

TRANSACTION SPECIALISTS' EDUCATIONAL FORUM QUESTIONS & ANSWERS – JUNE 2024

The following questions were submitted during the forum:

Question: How much time should pass between when a stipulation is keyed and STD. 674s being requested to issue pay?

Answer: Multiple areas are involved with stipulation processing, please allow up to two (2) weeks for processing.

Question: Does SCO have any plans on providing a 505 (account code) training for HR offices?

Answer: There is a self-paced training module available on the SCO website, that is titled "[Item 505 Retirement Codes](#)." The purpose of this training is to help you determine the correct retirement account code for keying Item 505 on the Personnel Action Request (PAR) and to create awareness of regulatory legislation and supporting documentation.

Question: Where can we get the new updated STD. 692 form (separate from the benefit calculator)?

Answer: Click the [STD. 692](#) hyperlink to access the form. Also, The [Department of General Services \(DGS\) Forms](#) website will always have the most updated version of forms needed.

Question: Will we receive a ding notice if we upload a STD. 674D to document type Green Cycle for 50% Non-Industrial Disability Insurance (NDI), 75% NDI, or State Disability Insurance (SDI) supplemental pay after monthly pay?

Answer: Green Cycle Documents are accepted during the published Green Cycle days on the [Decentralized Calendars](#). Please note that SCO begins accepting Green Cycle documents the day after monthly payroll cutoff.

Question: When submitting the documents during green cycle, what is the cut off time for the day? I have submitted documents at about 2:15 p.m. and it does not get processed until a day or two (2) later.

Answer: We batch documents up to 1:00 p.m. each Green Cycle Day. If received after 1:00 p.m., the document is batched first thing the next morning. Please note that SCO begins accepting Green Cycle documents the day after monthly payroll cutoff.

Question: How do we submit information if we do not have the ability to enter it in CalPERS?

Answer: Please contact your System Access Administrator at your department.

Question: Do we have to provide the CalPERS Reciprocal Self-Certification form to every single new-to-state appointment and update it into CalPERS?

Answer: Yes, this is a new responsibility. The Reciprocal Self-Certification form is to be completed by every retirement enrollment into CalPERS.

Question: What happens if we do not update reciprocal information in myCalPERS?

Answer: The member may not be enrolled correctly; there may be adjustments to payroll and create under/over payments. Failure to validate information may result in enrollment errors.

Question: We have an employee who transferred to our agency from another state agency and did not complete his reciprocity at his former agency. We are unable to key his reciprocity and he was told to go back to his former agency and have them mail in the form? Is this correct?

Answer: The former agency will need to enter the information in myCalPERS.

Question: What is the name of the CalPERS reciprocal online class?

Answer: It is named "myCalPERS Retirement Enrollment: Edit Reciprocal Information."

Question: If the Employment Certification is not completed by the 30-day deadline and its closed, how can we reopen the request?

Answer: You cannot; if you do not complete the employer information within 30 days, the member must resubmit their Service Credit Purchase request online.

Question: Why would a Savings Plus account go negative if a deposit was removed? Wouldn't that return the account to the original balance or 0? Is this mostly for lump sum or separations? Not active employees?

Answer: The California State Controller's Office (SCO) and Human Resources/Payroll offices across the State of California do not have a mechanism to check with the Savings Plus Program (SPP) to ensure there is an adequate balance in a participant's account before submitting a payroll reversal.

If there are insufficient funds in the participant's account (for example, the participant recently took a distribution, or separated from state service and cleared out their account), the payroll reversal will result in a participant account with a negative balance.

Although some accounts are later restored by payroll corrections and/or adjustments, many of these result in what we call a "Failed Negative." This is when there is no subsequent adjustment forthcoming and the participant's account remains in the negative.

Question: In the past to update/enroll in Vision Service Plan (VSP) during open enrollment, employees had to go directly to VSP. Why would we need the vision enrollment form?

Answer: Yes, the employee (EE) can still go directly through VSP and is encouraged to do so. Permanent Intermittent EEs enrolling/deleting is an example of when you would submit a STD. 700 Vision form to SCO for processing.

Question: Is there a form for long term disability?

Answer: Please review the [Benefits Administration Manual](#) (BAM) Long-Term Disability for clarification.

Question: Regarding the Family Connect Portal (FCP) reverification, if we see duplicate entries for dependents that have incorrect information, do we delete the incorrect entry from the FCP portal? Or do we need to contact FCP to remove the incorrect information?

Answer: Duplicate profiles are typically caused from the carriers having incorrect information. To correct a dependent's account, please contact the carrier with the incorrect information and update the dependent's information verbally. The following month the carrier with the incorrect information will send a file with the corrections and their FCP account will be updated. Carriers send their updated files between the 1st and 10th of each month. Once you notice the correct information has been uploaded into FCP, please delete the dependent's account that has the incorrect information. Please email to DRV@calhr.ca.gov, if you still have questions on this item.

Question: To confirm, when it comes time to recertify a disabled dependent, CalHR will handle that? We should not complete disabled child reverifications locally?

Answer: If the disabled dependent is not covered by the employee's health benefits and only covered by their dental and/or vision benefits, please ensure all documents are sent to our unit and we will complete the certification and make your department aware when a decision has been made. The HBD-34 form should be submitted to our unit directly from the doctor.

Question: How do you determine a Parent-Child Relationship (PCR)?

Answer: Parent-Child Relationship is established when an employee intentionally assumes parental status or duties over a child who is not the employee's adopted, step, or recognized natural born child, and meet specific enrollment criteria.

Question: A few retirees were sent Dependent Re-Verification (DRV) forms, does the personnel specialist process these?

Answer: There was an error where all retirees who were born in the month of July received the DRV notice for active employees. These retirees can disregard the notice from CalHR but should still respond to the notices being sent to them from CalPERS.

Question: What happens if Vision Service Plan (VSP) Premier does not get timely payments due to Accounts Receivables (A/Rs) pending to be set up because the employee is on Leave of Absence (LOA)? VSP Premier then cancels benefits due to non-payments. After, VSP enrolls employee and dependents into VSP basic. Can employee get a refund of VSP Premier?

Answer: If the member is termed for non-payment, then VSP would not have any Premier premiums to refund.

Question: About how long after a dental appeal is approved does the employee (EE) see their benefits?

Answer: The EE will see it in approximately 30 to 60 days.

Question: What is meant by submitting separate emails with identical subject lines? How does this help with redacting socials?

Answer: If your department does not allow you to send a full email in an encrypted manner, then you can send the email with the employee's (EE's) first five (5) digits of their social security number (SSN), and then on the second (separate) email include the EE's remaining four (4) digits of their SSN.

Question: Regarding Basic Vision, it is my understanding that for new employees (EEs), they are automatically enrolled? Is that correct?

Answer: Yes, Permanent Full-Time EEs are enrolled into Basic Vision automatically. Permanent Intermittent EEs must meet the control period, per CalHR [Benefits Administration Manual](#) (BAM).

Question: How long after we submit a STD. 692 does it take to delete a 26-year-old dependent? Should we wait for Family Connect Portal (FCP) to update? I have one that I submitted six (6) months ago, and the dependent is still listed on FCP as covered.

Answer: For the deletion to appear in FCP, the carriers would have to not report that they are enrolled in benefits. If the deletion is recent, there is a 90-day lag on when the dependent drops from their system. Please reach out to DRV@calhr.ca.gov, if you need further assistance on this item.

Question: CalHR approved an employee's dental appeal on 2/8/2024, but the State Controller's Office has not processed the form yet even though this is past the current processing dates. I have called on this and was told it would be processed.

Answer: Please forward the approval email to Dental@calhr.ca.gov to request a follow-up so the dental team can look into this specific matter.

Question: Do we need a letter regarding dropped coverage for a 26-year-old trying to get insurance or will CalPERS know they are dropped at 26?

Answer: If they are enrolling in a CalPERS plan due to loss of coverage, then they will need a loss of coverage letter, even if it's because they turned 26.

Question: What makes an employee "eligible" to cancel Basic Vision?

Answer: Please review the [Benefits Administration Manual](#) (BAM) Vision Care Program for clarification.

Question: Do I need to report when a Permanent Intermittent (PI) employee is eligible for benefits due to meeting the required hours in a control period in the Affordable Care Act System (ACAS)?

Answer: Yes, you will need to update the employee's ACAS to reflect that the employee is eligible for benefits.

Question: I have tried to enroll to Affordable Care Act System (ACAS) training twice and I received a reply with a certificate of completion; however, I have never taken the course. I have not gotten further information on how to enroll for the training.

Answer: Please reach out to acasupport@sco.ca.gov with any questions.

Question: Are the Affordable Care Act System (ACAS) penalties federal (cannot be waived/avoided)?

Answer: The Internal Revenue Service has provided relief from these penalties since the enactment of ACA.

Question: For example, if an employee permanently separates from Agency A without 6A, but then re-employs at Agency B, will a correction still be needed by Agency A?

Answer: If a separation is keyed by Agency A in employment history, Affordable Care Act (ACA) Status Code 6A will auto populate. If the employee is re-hired with Agency B prior to the effective date of the 6A, or transfers to Agency B, Agency B will need to ensure the accuracy of the employee record and make any updates necessary. Since Agency A will no longer have access to the employee record in the Affordable Care Act System (ACAS), it will be Agency A's responsibility to ensure the accuracy of all new and existing employee records at the time of hire and throughout their employment. If there are corrections that are a result of Agency A, Agency B should document them for potential future Information Reporting Penalties (IRP) purposes.

Question: An employee (EE) is requesting Form W-2s for the last four (4) years. Is this possible?

Answer: The EE can view their Form W-2s in Cal Employee Connect.

Question: Our agency has two (2) employees who we will be separating in the next few months due to Notice of Adverse Action. Both employees have Accounts Receivables (A/Rs) that were sent to SCO to establish due to late dock. I know, currently, the processing date is showing 5/10/2023. We are wondering when the time comes to separate these employees, if there is someone we can contact at SCO to expedite these A/Rs, to ensure we are able to recover them from their final pay?

Answer: Per our escalation guidelines, once the employee has a permanent separation code reflected in the employment history, HR offices may contact the [Statewide Customer Contact Center](#) (SCCC) and request for the A/Rs to be expedited. Please include the employees first and last name, upload date, upload dropdown, and upload time.

Question: I noticed that the STD. 674 payment type 0 processing date has not moved for a few weeks now. It has been at 01/22/2024, is that the correct processing date?

Answer: Yes, that date is correct.

Question: Can there be a note added to the Misrouted Notifications regarding the document submitted?

Answer: Thank you for your suggestion, this will be discussed internally.

Question: For an employee (who is only enrolled in dental) to recertify their Parent-Child Relationship (PCR), do I need to send his forms for recertification to the Dependent Re-Verification (DRV) email?

Answer: Yes, please send all PCR certification requests to DRV@calhr.ca.gov, and our team will complete the certification process.

Question: The STD. 674 A/R payment type 0 processing date has not moved for over a year, is that the correct processing date?

Answer: Yes, the date is correct.

Question: On the weekly processing dates, would someone be able to tell me what the difference is between Industrial Disability Leave (IDL) Special and IDL Complex?

Answer: Please see the [Workload Definitions for Statewide Civil Service Disability Program](#) document on the SCO website.

Question: How many 715s in a row can be keyed in an employee's (EE's) employment history? Is there a difference in how many 715s can be keyed when there is pay due to the EE or no pay due to the EE? Where can we find a rule in writing?

Answer: You cannot have NON in item 606 two (2) times in a row per the [California Code of Regulations \(CCR\) 599.785.5](#).