



Transaction Supervisors Forum

February 2021

SURVEY QUESTIONS:

The following questions were submitted via the Transaction Supervisors' Forum survey. If you would like to submit a question for the next forum, please use the survey link that will be provided with the invite.

- **Question:** What is the fastest way to get documents to SCO SDI/NDI and IDL, would it be to email or fax?
 - **Answer (Jill Souza):** The most ideal way is when emails are sent to our email inbox indicating which program area you are sending documents to.
- **Question:** Holidays are to be considered an EFMLA day if they fall into a block of EFMLA time taken, what does SCO consider a block of time? A week, 12 days?
 - **Answer (Kim Herlache):** Anything beyond a day is considered a block of time.
- **Question:** Can you please share any information and/or guidance you have related to Gov Code Section 12479. Specifically, is there a published procedure on issuing final pay to a designee of a deceased employee, including any reference to an official State stamp that authorizes the designee to receive and negotiate the warrant?
 - **Answer (Cari Buenaventura):** In order to help with processing transactions I can provide the link to our processing manual. There are references to different sections for special processes. SCO will process the PAR in the order it was received. Labor Code: CLC 202 (b) states notwithstanding any other law, the state employer shall be deemed to have made an immediate payment of wages unless contributions shall be tendered for payment to the employee's pre-tax or Roth 401(k), 403(b), or 457 plan account no later than 2 ½ months after the employee's final day of employment. If deferring into two tax years CLC 202(c) states plan contributions shall be deposited no later than 2 ½ months after the employee's last day of employment; payments shall be tendered no later than February 1 in the year following the employee's last day of employment.
 - FAQ sheet: https://sco.ca.gov/Files-PPSD/Lump_Sum_Separation_Pay_FAQ.pdf
- **Question:** Currently 674 AR's using leave offset is backlogged two years, current processing date is 02/04/19. How is this going to be brought up to date? Any documents you process

must have to go back to the agency for re-calculations due to GENs, MSAs, pay reductions etc.

- **Answer (Bryce Miller):** We are diligently catching up on our backlogs, and leave credit offsets is one of our priorities. We are currently processing documents as is, but if you need to reach out to make adjustments to the form we will reach out on a case by case basis. When SCO specialist are reaching out for clarifications, please ensure that you are responding timely to these requests to avoid delays.
- **Question:** In a previous Supervisor's Forum it was mentioned that there would be electronic STD.672s, is there a completion date yet?
 - **Answer (Nastassja Johnson):** The business requirements to create an electronic version of the STD.672 has been sent to our technical team (SCO). PPSD does not have an estimated day on when the electronic version will be available, however we will follow up once we have an update on it.
- **Question:** In the recent months, we have scanned and emailed documents to SCO for processing, however, when we call to check the status based on the processing dates, SCO states they were never received. When we resend by forwarding the original email, will those documents be placed and worked with the documents based on their original scan/email dates or will they be place and worked based on the 2nd scan/email dates? When emailing documents to the PPSDTempOps@sco.ca.gov email address, can SCO put an auto reply on every email sent, not just the original email sent?
 - **Answer (Cari Buenaventura):** If you have a copy of the first email that included your attached document sent to a valid email address, we will process the original document according to the initial sent date. We won't go by received dates in these cases as long as it was sent to valid email address.
- **Question:** Who is the new contact at CalHR to update our list of persons permitted to contact the Dental/Vision carriers for employee enrollment issues?
 - **Answer (Chiara Galloway):** The correct email box is:
visiondental.authorization@calhr.ca.gov
- **Question:** Recently, we've had a lot of new hires that are not reflecting in the CalPERS system. We've checked weeks after they were keyed in SCO and they still are not reflecting. Who do we contact when a new hire does not show up in the CalPERS system, but was keyed in SCO? We've received the run around between SCO and CalPERS.
 - **Answer (Tracy Gutierrez):** We also send a daily enrollment file into myCalPERS. This file only includes employees who are CalPERS members. Health only appointments do not go over on our files, something we do not handle at the SCO level.

Sometimes things do error out for CalPERS members, if so you can contact the membership section at CalPERS or call our customer center at SCO.

- **Question:** Does any department have a policy on the increments used for docking employees? Do employees only dock in 15 minute increments or do they dock down to the minute? Example: If the supervisor docks an employee for five minutes it creates an increased workload for the Personnel Specialist. The PS must pull the master, send it back to SCO for redeposit, wait for redeposit and then correct the paycheck or set up an AR for five minutes.
 - **Answer (Kim Herlache):** We've been doing research on this because the MOUs talk about the increments in which leave credits can be used. We're not finding anything that talks specifically about Doc. We currently do not have an answer, hoping to have one by the next meeting.
- **Question:** When does SCO anticipate having 2020 retirements with lump sum deferral (2020 and 2021) processed?
 - **Answer (Renee McClain):** As it stands right now we've received over 2,600 separations, which is a little bit more than normal. We have about 5 audit staff on our team and 8 payroll staff that have to manually process the deferral amount for each pay period. Some departments may not be aware of the labor code, but you actually have 2.5 months from the time of separation in order to process the separation.
- **Question:** Employee (EE) originally had an S41 dismissal. A stipulation later came in removing the S41 (to S41E) and changing the S41 to a PUN. Are agencies able to key the S41 V or E then key the PUN on top in order for the EE's benefits to start up again? (Note: CalPERS sent the EE a letter stating the EE's benefits would stop due to the separation [meaning the S41 stopped the benefits])
 - **Answer (Renee McClain):** No, they have to be submitted to SCO because of the stipulation process. There is a stipulation guide on the SCO website under our resources section for additional information on the process.
- **Question:** What is preventing SCO from taking the State Disability Insurance (SDI) Accounts Receivable directly from the employee's payroll check like the retirement mishap, a few months back?
 - **Answer (Lisa Dean):** When we process those retirement adjustments back in August from the July pay period, we followed some very specific procedures that are laid out in the PPN which allow us to take arrears adjustments by doing a deduction out of the next pay period. When it came to the SDI issue we had in December, that falls

under the process that drives us to setting up the accounts receivable per the government code & MOU established. We were just following procedures.

- **Question:** On 1/19/21 CalPERS released Circular Letter #200-006-21 (ca.gov) which notified departments that employees can now submit service credit purchase requests through myCalPERS. After working through various requests myself and after contacting CalPERS for guidance, I wanted to provide some insight to other agencies who may be experiencing the same issues I did, and also pose a question for SCO. Employers are now required to certify dates when the employee worked at that agency, regardless of whether or not the employee now works at another agency. Personnel offices will need to contact each other to obtain PIMS information whenever a service credit request is submitted with CalPERS. Be aware that the timeframe for agencies to certify the information with CalPERS is 30 days, so these requests should be completed between agencies in a timely manner. If an employee is requesting service prior to membership, the payroll records will not be included in their CalPERS history and need to be added manually. CalPERS shared a student guide with me, which gives step-by-step instructions on how to key this in. If the timeframe that needs to be keyed is within 3 years, agencies can access the records through the SCO system. However, if beyond 3 years, agencies now need to request pay history records from SCO. In my experience, these requests take over 30 days to be completed, however CalPERS will cancel the employee's request if the agency does not certify within 30 days. Is SCO going to implement a new process for requesting pay history, or be able to provide faster turnaround times? I also brought this to CalPERS's attention, that agencies may not be able to meet their deadline if older pay history is needed.
 - **Answer (Sarah Huggins):** The State Controller's Office processes Payment History requests for current and prior Civil Service employees. To request payment history, please provide the following information in a letter or memo:
 - Employee's full name
 - Employee's full Social Security Number (SSN)
 - Pay Period(s) of payment data needed
 - Brief explanation of why the data is needed
 - The type of data needed (please let us know if you need Miscellaneous Deduction level data)
 - Contact information (return address, email, and phone number) so that we may reach the requestor if there are any questions
 - Signature of the requestor or authorizing manager
 - Civil Service departmental Human Resource offices may now submit payment history requests via Encrypted Email to: ReportingOperations@sco.ca.gov.
 - All other requestors, and requests that cannot be sent via Encrypted Email, should be mailed to the following for processing:

*State Controller's Office-Personnel/Payroll Services Division-PMAB
ATTN: Michele Hawkins
300 Capitol Mall Suite #1001
Sacramento, CA 95814*

- **Question:** Extension for EPSLA
 - **Answer (Megan Vinson):** After the Transaction Supervisor's forum in February, it was brought to our attention that misinformation regarding the EPSLA and EFMLA benefits was shared in the chat. For clarification: the SPSL benefit is eligible to be used past the expiration date of December 31, 2020 if the usage of the benefit started prior to the expiration date and the benefit is used in a continuous manner. This benefit, per the CalHR policy, should be keyed as ATO in the Leave Accounting System. EPSLA and EFMLA are not eligible for that same extension. Those benefits expired on December 31, 2020, with no allowance for extended usage into 2021.

Benefits

❖ **Affordable Care Act (ACA) Program Updates – Sarah Huggins (SCO)**

- New ACA Manager
- 2020 1095-C Update
 - PDA1782: 1095-C Issued Report
 - Duplicate 1095-C Process
- Training Update
 - January 2021 Re-verification due date

❖ **Affordable Care Act (ACA) Updates – Wendy Yang and Elaine Smith (CalHR)**

- Quarterly ACA Compliance Review
 - During the first week of February, CalHR notified departments with outstanding ACAS errors (over 90 days). Departments are expected to correct and certify the correction of the outstanding ACAS errors within 30 days of receipt of notification from CalHR.

❖ **Vision Program Updates – Lisa Hatten (CalHR)**

- Reminder to personnel staff to contact VSP directly for vision inquiries other than appeals. Email VSP directly at stateofca@vsp.com.
- Any name change requests must be communicated directly through SCO to be transmitted onto the monthly data files that are sent to VSP.
- Reminder to assist prospective retirees in completing the CalHR 695 form if they wish to continue vision benefits into retirement. Send forms directly to VSP.
- Vision backlog is caught up to January 15, 2021.

❖ **Dental, FlexElect and CoBen Updates- Chiara Galloway (CalHR)**

- Appeals status updates
 - Appeals turnaround times vary by program
 - dental@calhr.ca.gov or flexelect@calhr.ca.gov
- Reminders
 - Ensure to submit complete appeal packages with correctly completed forms matching request
 - Be sure to check the version of the forms completed by employees
 - Only mandatory deletions can be processed administratively
 - Some requests do not require an appeal
- Resources
 - Benefits Administration Manual (BAM) and HR Manual

❖ **Benefits Reminder - Bryce Miller (SCO)**

- Benefits Reminders

Program Updates

❖ **Reminders and Updates to Certification Process – Michelle Norris (CalPERS)**

- The paper MEM-1344 was replaced with an online method for you to submit the Request for Employment Information.
- Your agency will be notified based on your notification preferences in MyCalPERS to complete the employment certification if for an arrears
- If for a service credit purchase request this is now initiated by the employers electronically only through the MyCalPERS system
- The letter for this request is titled Request for Employment Information.
- Will consist of two sections
- Employment Information
- Payroll Detail/Earnings information
- Your agency will have 30 days to complete the certification in MyCalPERS.
- What causes an arrears?
- Under Gov. Code section 20283 of the Public Employees' Retirement Law (PERL), employers have 90 days to establish membership in MyCalPERS.
- Enrollments entered into MyCalPERS outside of the 90-day time frame are considered late.
- Reminders
 - Arrears notifications
 - Get your appointment entered on time
 - Submit SPM requests early
 - Waive and reconsider determinations
- Arrears reconsideration?
- System Logic

- A nightly batch process captures the retirement appointments entered that day in MyCalPERS with an effective date more than 90 days in the past. When a retirement appointment is entered with a start date of more than 90 days in the past, your agency will receive a Notification of Reported Late Appointment. You may access this notice by selecting the Document History left-side link.

❖ **W-4 Updates Due to Tax Cuts and Jobs Act of 2017 – Tracy Gutierrez (SCO)**

- 2020 Employee Action Request (EAR) Std. 686 Form and Federal Withholdings Toolkit
 - Link to Toolkit:
 - https://www.sco.ca.gov/ppsd_2020fedwithholdings.html
 - FAQ
 - EAR Quick Start Guide
 - EAR Keying Guide
- Developing e-learning
 - Class for HR shops, employees

❖ **2020 W-2 Cal Employee Connect CEC Update – Liz James (SCO)**

- Connect Human Resources (HR) Portal Updates
- New Connect HR mailbox: hrconnecthelp@sco.ca.gov

Closings

❖ **CalHR Benefits' Resources**

- **Websites**
 - Human Resources: <https://www.calhr.vs.gov/state-hr-professionals>
 - State Employees: <https://www.calhr.ca.gov/employees>
- **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
 - CalHR Suggestions and Feedback benefits@calhr.ca.gov

❖ **CalPERS Resources**

- [State Reference Guide](#)
- [Membership Reporting@calpers.ca.gov](mailto:Membership_Reporting@calpers.ca.gov)
- [Membership Appeals@calpers.ca.gov](mailto:Membership_Appeals@calpers.ca.gov)
- [Circular Letter 200-042-20](#)
- [myCalPERS Employment Certification Functionality Student Guide](#)

- CalPERS Customer Contact Center
- 888 CalPERS (or 888-225-7377)

❖ **SCO Resources – Nastassja Johnson (SCO)**

○ **Websites:**

- Human Resources: https://sco.ca.gov/ppsd_state_hr.html
- State Employees: https://sco.ca.gov/ppsd_se_payroll.html

○ **Contact:**

- [Statewide Customer Contact Center](#) (916) 372-7200
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Cal Employee Connect Email connecthelp@sco.ca.gov
- Cal Employee Connect Feedback Email connectfeedback@sco.ca.gov

○ **SCO Key Initiatives:**

- Cal Employee Connect Project
- CalATERS Replacement Project
- California State Payroll System Project

CUSTOMER RELATIONS SURVEY:

Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov

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