1. **What is OPEB CBID?**

   Other Post-Employment Benefits (OPEB) Collective Bargaining Identifier (CBID) is a new civil service/exempt data item, effective 01/31/19. It denotes whether an employee is eligible or not eligible for OPEB contributions and it is completely computer-generated for all departments. In rare instances where an exception OPEB CBID value is appropriate, the department must submit a Personnel Action Request (PAR) document to Personnel and Payroll Services Division (PPSD) for key entry.

2. **How Does OPEB CBID Affect Payroll OPEB Contributions?**

   Until SCO implements fully automated Payroll modifications for OPEB contributions, the Employment History (EH) OPEB CBID will have no bearing on Payroll OPEB contributions. In the meantime, the existing interim Payroll OPEB Contribution process will remain the same.

3. **Where Can I Find Other References Regarding OPEB CBID & OPEB?**

   SCO Personnel Letter #19-005 (Civil Service Only) can be referenced for additional information at https://sco.ca.gov/Files-PPSD-Letters/Payr/2019_e19-005.pdf

   CalHR OPEB Policy Information can be referenced at:
   http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422

4. **How Was OPEB CBID Originally Updated on EH/PIMS?**

   The State Controller's Office (SCO) processed an EH mass update on the evening of Thursday, 01/31/19. The mass update posted a 126 transaction effective 01/31/19 for active and on leave records to add OPEB CBID values. The mass update did not update records with appointment or separation expiration dates earlier than 01/31/19.

   If a record rejected from the mass update, but the SCO knew the employee's OPEB CBID value, PPSD manually key entered a 126 transaction effective 01/31/19 to update the new OPEB CBID. Those transactions were key entered within a few days following the mass update.

5. **Where Can I Find OPEB CBID on EH/PIMS?**

   a. **Inquiry Screens**

   When viewing the Inquiry PIMS PAR 1 screen, OPEB CBID appears on the same line as Position Number, to the immediate right of Employee CBID.

```
-----POSITION NUMBER----  DEPT  CLAS    EE    OPEB           CNTY  OTHER      BIRTH      PERS
AGENCY UNIT CLASS SERIAL  CODE  TYPE   CBID   CBID           CODE   POS       DATE       FLAG
```

OPEB CBID also appears on the PIMS Inquiry History Type A and B screens. For each of these screens, it appears near the bottom of the screen, to the immediate right of Employee (EE) CBID.

For the History Type A screen, it appears as 'OPEB CBID'.

```
TAU CLEAR    CTYPE      EE-CBID R06 OPEB-CBID R06 PS-CBID
```

For the History Type B screen, it appears as 'OP CBID'.

```
MHR                      APT-TYP F GSI   EE-CBID R06 OP-CBID R06 PS-CBID
----------------------------ESTABLISHED EARNINGS----------------------------
L 8KG   200.00           0.00           0.00
```

b. **Update Screens**
When keying any transaction where the Personnel Action Manual (PAM) shows OPEB CBID as required/conditional, OPEB CBID will appear on the update screen, but the cursor will skip over the field since it is computer-generated only.

- Transactions where OPEB CBID is considered required/conditional, include: all appointment transactions and the 120, 126 and 405 transactions.
- For all other transactions, OPEB CBID will carry forward per normal transaction processing.

6. **What Should I Know About OPEB CBID on Turnaround & Padded PAR Forms?**

a. **Where Can I Find OPEB CBID on the PAR?**
OPEB CBID appears in Item 142 as the last (most right) item on the PAR Line 1. It replaces what used to be the display only/computer-generated only item 145, ANNIV DATE. (The employee's actual Anniversary Date information is located in Item 330 on Line 3.)
   - Note: Item 142, OPEB CBID, appears in the same place on both the Turnaround PAR (SCO-680, REV-10) and the Padded PAR (STD. 680A, REV. 01/2019)) forms,
   - On both forms, Item 142 is shaded since it is a computer-generated item.
   - The first 'OPEB CBID' Turnaround PARs resulted from PAR transactions key entered on 02/1/19 and later.
   - The first 'OPEB CBID' Padded PARs were available at General Services on 01/31/19.

b. **Turnaround PARs from the OPEB CBID Mass Update**
Due to the volume of all Civil Service/Exempt active and on leave employee records, the SCO did not produce Turnaround PARs from the OPEB CBID mass update. We apologize for any inconvenience this may have caused, but we believe that the workload

associated with printing, delivering and filing a Turnaround PAR for nearly every Civil Service/Exempt employee, outweighed any potential inconvenience.

c. **Turnaround PARs Soon After the 1/31/19 OPEB CBID Update**
If you received a Turnaround PAR shortly after 1/31/19, with a 126 transaction effective 1/31/19 and an updated OPEB CBID, the 126 transaction was likely key entered by PPSD for a record that rejected from the mass update.

7. Does OPEB CBID Create NOPA (Notice of Personnel Action) Messages?

a. **Why Did I Receive a NOPA from a 120 Transaction?**
Previously, 120 transactions did not produce NOPA documents. With the implementation of OPEB CBID, however, the PIMS system generates NOPA messages for specific changes to OPEB CBID. If that change occurs on a 120 transaction, the system generates a NOPA. This is the only condition for which a 120 transaction will produce a NOPA.

b. **When Will OPEB CBID Produce a NOPA Message**?
NOPA messages will only be produced for transactions that are effective 01/31/19 and later. The following describes when an OPEB CBID change will generate a NOPA and what the NOPA message will say.

Message Text	When a NOPA is Produced
YOU ARE NOT SUBJECT TO OPEB CONTRIBUTIONS TO PRE-FUND RETIREE HEALTH BENEFITS.	Any Appointment Transaction where the After Image OPEB CBID = "NON".
	Miscellaneous Change Transaction 120, 126, or 405 where: • The After Image OPEB CBID = "NON" and • The After Image OPEB CBID ≠ the Before Image OPEB CBID.
YOU ARE SUBJECT TO OPEB CONTRIBUTIONS TO PRE-FUND RETIREE HEALTH BENEFITS.	Any Appointment Transaction where the After Image OPEB CBID ≠ "NON".
	Miscellaneous Change Transaction 120, 126, or 405 where: • The After Image OPEB CBID ≠ "NON" and • The After Image OPEB CBID ≠ the Before Image OPEB CBID.

8. **How Does OPEB CBID Get Updated on EH/PIMS?**

a. **Why Didn't a Transaction Generate OPEB CBID?**
OPEB CBID is effective 01/31/19. If the transaction is effective prior to 01/31/19, OPEB CBID will not generate.

> **NOTE: When processing a New Hire or Reinstatement Appointment transaction that is retroactive and effective prior to 01/31/19:** You must also process a 126 transaction effective 01/31/19 to generate OPEB CBID. Because OPEB CBID is completely computer- generated for departments, simply key enter the 126 transaction.

b. **What Transaction(s) Can I Use to Update OPEB CBID?**
Because OPEB CBID is a computer-generated item, if you believe a previously key entered transaction did not generate the correct OPEB CBID, please contact the PPSD Statewide Customer Contact Center at (916) 372-7200.

> **126 Transaction:**
>
> - If the primary purpose of your EH action is to update/change the employee's OPEB CBID or Employee CBID, use a 126 transaction.
>   - NOTE: A 126 transaction should only be effective on the first day of a pay period, whether updating Employee CBID or OPEB CBID.
> - Because OPEB CBID is completely computer generated for departments, simply key enter the 126 transaction with the appropriate effective date to generate OPEB CBID. If Employee CBID is changing, you must enter a value in that field.
>
> **When a Permanent Intermittent Employee Becomes Eligible for Retirement**
> When a Permanent Intermittent employee works the appropriate number of hours and becomes eligible for retirement, and you key enter a 505 transaction to effect his/her retirement status, you must also key enter a 126 transaction to computer generate the employee's OPEB CBID.
>
> **Other transactions that generate OPEB CBID, include:**
>
> - All Appointment transactions.
> - The 120 and the 405 Miscellaneous Transactions.
>   - The 120 and 405 transactions allow for the entry of Employee CBID. If Employee CBID changes, it is possible that OPEB CBID will also change.
>   - If a 405 transaction changes an employee's time base to/from OPEB eligibility, it is possible that OPEB CBID will change to/from NON or an eligible OPEB CBID.

9. **What Values are Computer-Generated for OPEB CBID?**

    a. **OPEB CBID Values**
        - When an employee is not OPEB eligible, OPEB CBID will reflect 'NON'.
        - When an employee is OPEB eligible, OPEB CBID will reflect a value that is similar in format to Employee CBID.
            o When the system determines an employee to be OPEB eligible, it then examines the record further to determine if the OPEB CBID should be equal to:
                - His/her Employee CBID or
                - An exceptional value.

    The following sections describe how the system determines a record to be OPEB eligible or not – and how it determines the appropriate OPEB CBID.

    b. **Eligible vs Not Eligible**

    For most employees, the California Department of Human Resources (CalHR) identifies OPEB eligibility conditions in their OPEB Policy Statement at: http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422.

    Eligibility conditions for Judicial Council employees are similar to CalHR, with a few small exceptions for Permanent Intermittent and Temporary employees.

    In most cases, an employee's tenure/time base and retirement membership determines their OPEB eligibility. However, there are a number of instances where only an employee's class code, employee CBID and/or class type determine their OPEB eligibility. See the section below titled, Additional Records That Are Not OPEB Eligible, for those exceptions.

    c. **Not Eligible for OPEB**
        Employees are NOT Eligible for OPEB if their EH record, effective 01/31/19 or later, meets any of the following conditions.

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
1	Any Employee Who is Not a Retirement Member	Equal to N, NA, NM, NO, TD or TM	N/A	N/A	N/A	N/A	NO
2	Any Employee: • Any Time Base • Tenure is Retired Annuitant	N/A	N/A	= 'R'	N/A	N/A	NO
3	Any Employee: • Time Base is Indeterminate	N/A	= 'IND'	N/A	N/A	N/A	NO

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
4	Any Employee: • Time Base is Less Than Half-Time	N/A	Numeric & < '001002'	N/A	N/A	N/A	NO
5	Any Employee: • Time Base is Intermittent & • Tenure is Temporary	N/A	= 'INT'	= 'E', 'L', 'T'	N/A	N/A	NO
6	Judicial Council Employee Only: • Time Base is Intermittent & • Tenure is Permanent	N/A	= 'INT'	= 'P'	= 'J'	N/A	NO
7	Not a Judicial Council Employee: • Any Time Base • Tenure is Temporary (Limited Term or TAU) & • Appointment Number of Months is Blank.	N/A	N/A	= 'L', 'T'	Not = 'J'	= Blank	NO

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
8	Not a Judicial Council Employee: • Any Time Base • Tenure is Temporary (Limited Term or TAU) & • Appointment Number of Months is Non-numeric.	N/A	N/A	= 'L', 'T'	Not = 'J'	Non-numeric	NO
9	Not a Judicial Council Employee: • Any Time Base • Tenure is Temporary (Limited Term or TAU) & • Appointment Number of Months is Numeric AND Equal to or Less Than 6 Months.	N/A	N/A	= 'L', 'T'	Not = 'J'	Numeric & =/< '06' months	NO

d. **Additional Records That Are Not OPEB Eligible**

The following employee groups are not eligible for OPEB for reasons other than time base, tenure and retirement status. OPEB CBID = 'NON' will be computer-generated for these employees.

- Seasonal Class Codes for which a link exists at: http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422
- Satellite Wagering Facility employees with Employee CBID E25.
- California Conservation Corps employees.

- Judges, Legislators and Constitutional Officers, Employee CBIDs = E90, E91 and E92.

e. **Eligible for OPEB**

The information below identifies specific conditions used to determine if an employee is OPEB eligible – with differences reflected for civil service/exempt versus Judicial Council employees.

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
10	Any Employee Who Is: • A Retirement Member & • Time Base is Full Time or (Equal to or Greater than Half-time) & • Tenure Is Permanent, CEA or Emergency.	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'FT' or Numeric and = or > '001002'	'P', 'C' or 'E'	N/A	N/A	YES
11	Not a Judicial Council Employee Who is: • A Retirement Member & • Time Base is Intermittent & • Tenure is Permanent or CEA.	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'INT"	'P' or 'C'	Not = 'J'	N/A	YES

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
12	Not a Judicial Council Employee Who is: • A Retirement Member & • Time Base is Full Time or (Equal to or Greater than Half-time) & • Tenure is Temporary (Limited Term or TAU) & • Appointment Number of Months is Greater than 6 Months.	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'FT' or Numeric and = or > '001002'	'L' or "T'	Not = 'J'	Numeric & > '06' months	YES
13	Judicial Council Employee Only Who Is: • A Retirement Member & • Time Base is Full Time or (Equal to or Greater than Half-time) & • Tenure is Temporary (TAU)	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'FT' or Numeric and = or > '001002'	'T'	= J	N/A	YES

    f. When OPEB CBID Is Not Equal to Employee CBID
Currently, there are two (2) types of OPEB CBID exceptions.

Some CEA (Career Executive Assignment) Appointments
A small group of CEA employees exists for whom their OPEB eligibility relates to a specific bargaining unit, mostly for units 6, 7, or 8. Their OPEB CBID will not equal M01;

instead, it will equal M06, M07 or M08. These values are exceptions to the normal OPEB CBID generation for which only PPSD can enter the OPEB CBID information.

Once CalHR approves one of these "OPEB exception" appointments, the department can either:

- Key enter the appointment and allow the M01 OPEB CBID to generate, then:
  - If the appointment is effective on the first of the pay period, submit a 126 transaction to PPSD with the same effective date as the appointment, and the exception OPEB CBID documented in Item 142 on the PAR.
  - Or, if the appointment is effective mid-month, submit an appointment correction with the exception OPEB CBID documented in Item 142 on the PAR.
- Or, submit the original CEA appointment transaction to PPSD for key entry with the exception OPEB CBID documented in Item 142 on the PAR.

In any of these cases, the department should document in Line 10 of the PAR: CEA employee has an exception OPEB CBID that requires PPSD key entry.

Once the CEA "exception OPEB CBID" appointment is key entered on EH/PIMS, any subsequent appointment, 120, 126 or 405 transaction must also be key entered by PPSD if the employee remains in a CEA appointment and his/her OPEB CBID remains an exception (not equal to M01).

- Appointment, 120, 126 and 405 transactions allow the generation of OPEB CBID. If the exception OPEB CBID is not key entered, these transactions will generate M01 in Item 142.
- Other transactions will carry the existing OPEB CBID forward according to normal in sequence and out of sequence transaction processing.

If a subsequent transaction changes the employee's status in such a way that he/she no longer has an exceptional OPEB CBID, departments can key enter the transaction and OPEB CBID will be computer-generated.

Other OPEB CBID Exceptions
A few other OPEB CBID exceptions exist for specific class codes associated with Employee CBIDs E97, E98, E99 or M99.

The following exception values will be computer-generated. They are also referenced in CalHR Policy at: http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422

EE CBID	Class Type	Class Code	OPEB CBID
R01		0032	NON
R01		0033	NON
R01		0034	NON
E		0365	NON
R11		0790	NON
R11		0835	NON
E		0986	NON
E10		0986	NON
R12		0987	NON
R12		0989	NON
R07		0990	NON
R07		0993	NON
R07		0994	NON
R12		0996	NON
E		1016	NON
E		1019	NON
E		1021	NON
R11		1023	NON
R07		1030	NON
E		1035	NON
R08		1080	NON
E04		1120	NON
E97		1120	NON
R04		1120	NON
E		1158	NON
E		1161	NON
E		1854	NON
E		1860	NON
R11		1931	NON
R07		1949	NON
R19		2168	NON
R01		2791	NON
R11		3012	NON
R03		3082	NON
E		4660	NON
E		4708	NON
E		4854	NON
E		4857	NON
E		4863	NON
E		4870	NON
R11		4871	NON

EE CBID	Class Type	Class Code	OPEB CBID
E		4872	NON
E		5048	NON
E		5178	NON
E		5999	NON
E		6197	NON
E		6198	NON
E		6199	NON
E		6226	NON
E		6242	NON
E		6245	NON
R10		7956	NON
R18		8233	NON
R18		8254	NON
R20		8434	NON
E		8895	NON
E		8981	NON
R19		9313	NON
E		9991	NON
R15		9992	NON
R11		9993	NON
E25		****	NON
E90	L	****	NON
E91	L	****	NON
E92	L	****	NON
E	E	****	NON
E97		9704	R06
E97		9705	R06
E97		9766	R06
E98		9706	S06
E98		9767	S06
E99		9764	M06
E99	F	0320	M06
E99	F	0321	M06
E99	F	0322	M06
E99	F	0533	M06
E99	F	1680	M07
E99	F	5033	M06
E99	F	5507	M06
E99	F	6281	M06
E99	F	6298	M06
E99	F	6380	M08

EE CBID	Class Type	Class Code	OPEB CBID
E99	F	6581	M06
E99	F	7642	M06
E99	F	8668	M07
E99	F	8963	M07
E99	F	9042	M05
E99	F	9077	M06
E99	F	9081	M06
E99	F	9380	M06
E99	F	9404	M07
E99	F	9487	M07
E99	F	9593	M06
E99	F	9625	M06
E99	F	9649	M06
E99	F	9657	M06
E99	F	9678	M05
E99	F	9915	M06
E99	L	0318	M06
E99	L	7912	M06
E99	L	8373	M05
E99	L	8667	M07
E99	L	8964	M07
M99		0011	M01

10. How Does OPEB CBID Work with Out of Sequence Transactions?

For most transactions, OPEB CBID carries forward per normal in sequence and out of sequence transaction processing.

Exceptions:
For any transaction where the PAM shows OPEB CBID as required/conditional, it is computer- generated. It cannot be key entered by departments and it will not carry forward. Transactions for which this occurs, include: all Appointment transactions and the 120, 126 and 405 transactions.

If processing an out of sequence transaction effective prior to 01/31/19, OPEB CBID will be blank. If corrected transactions are processed as part of the out of sequence package, and they are effective equal to or later than 01/31/19, the corrected transactions will generate OPEB CBID according to the eligibility information contained in those transactions.