

STATE CONTROLLER'S OFFICE
PERSONNEL AND PAYROLL SERVICES DIVISION
P.O. BOX 942850
SACRAMENTO, CA 94250-5878

DATE: January 30, 2019

PERSONNEL LETTER #19-005
(Civil Service Only)

TO: All Agencies in the Uniform State Payroll System

FROM: Marissa Revelino, Chief
Personnel and Payroll Services Division

RE: NEW DATA ITEM, OPEB CBID, AND RELATED MASS UPDATE

The State Controller's Office (SCO) is implementing a new Employment History (EH) data item, OPEB CBID, to identify an employee's eligibility for Other Post-Employment Benefits (OPEB). This letter contains information describing the data item as well as an upcoming mass update that will populate values for the item. Because a special processing request exists, the mass update is discussed first.

EMPLOYMENT HISTORY (EH) MASS UPDATE PROCESSING

To implement OPEB CBID, the SCO will process an EH mass update on the evening of Thursday, 1/31/19. The mass update will post a 126 transaction effective 1/31/19 for active and on leave records to add OPEB CBID values. (See the New Data Item section below for specific values.) Records with appointment or separation expiration dates earlier than 01/31/19, will not be updated.

Due to the volume of records being updated, the SCO will not produce Turnaround PARs from this mass update.

DEPARTMENTAL ACTION REQUIRED TO ASSIST THE MASS UPDATE

Except for separation and EAR transactions, Personnel/Payroll Services Division (PPSD) requests that you refrain from key entering PAR transactions on Thursday, 01/31/19, regardless of their effective date. This key entry limitation will help ensure that the greatest number of 126 transactions successfully update and it will reduce the number of transactions that require manual processing to complete the update.

PPSD will manually update EH records not included in the mass update and will notify departments of any situations requiring department action.

Reminder: any PAR transaction that is processed after the 126 transaction will require the Document Processing Number be incremented.

NEW EH DATA ITEM #142, OPEB CBID

PAM revisions will be published in the near future with all OPEB CBID related detail. Until that time, the following provides the most important information regarding this item.

NO IMPACT ON PAYROLL OPEB CONTRIBUTIONS

Until Payroll modifications are implemented in 2020, the EH OPEB CBID will have no bearing on Payroll OPEB contributions. In the meantime, the Interim Payroll OPEB Contribution process will remain the same.

OPEB CBID VALUES

OPEB CBID is a new civil service/exempt data item, effective 1/31/19. 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 needed, the department must submit a PAR document to PPSD for key entry.

OPEB eligibility is determined by tenure/time base and retirement membership. However, there are a number of instances where eligibility is determined by virtue of class code, employee CBID and/or class type. These exceptions are identified below in the OPEB CBID EXCEPTION VALUES section.

- For most employee's, OPEB eligibility conditions are identified by CalHR in their OPEB Policy Statement at [CalHR 1422 - OPEB Prefunding](#).
- Eligibility conditions for Judicial Council employees are similar to CalHR, with a few small exceptions for Permanent Intermittent and Temporary employees.
- When an employee is not OPEB eligible, OPEB CBID will reflect 'NON'.
- When an employee is eligible, OPEB CBID will reflect a value that is similar in format to Employee CBID. In most cases, it will be equal to the employee's Employee CBID.
 - A few exceptions exist for specific class codes associated with Employee CBIDs E97, E98, E99 or M99. These exception values will be computer generated.
 - Also, there is a very small group of individual CEA employees whose OPEB eligibility is tied to a related bargaining unit, mostly for units 6, 7, or 8. These values will be initially computer generated by the 1/31/19 mass update, but any OPEB CBID changes to these records must be submitted to PPSD for key entry, once the CEA appointment is approved by CalHR. (Special instructions will be issued.)

WHERE TO VIEW OPEB CBID ON EH (PIMS)

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

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

Screen A

EE-CBID R18 OPEB-CBID R18 PS-CBID

Screen B

EE-CBID R18 OP-CBID R18 PS-CBID

When key entering a transaction where OPEB CBID is considered 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.

WHERE OPEB CBID APPEARS ON PAR FORMS

On both the Turnaround PAR and the Padded PAR forms, OPEB CBID will appear as the last (most right) item on Line 1. It replaces what used to be the display only/computer generated only item #145, ANNIV DATE. (The employee’s actual Anniversary Date is located in Item 330 on Line 3.)

- Item 142 on both PAR forms will be shaded since it is a computer generated item.
- The first ‘OPEB CBID’ Turnaround PARs will be generated from PAR transactions key entered on 2/1/19.
- The first ‘OPEB CBID’ Padded PARs will be available at General Services on or around 1/31/19.

OPEB CBID EXCEPTION VALUES

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

- Seasonal Class Codes for which a link exists at [CalHR 1422 - OPEB Prefunding](#).
- Satellite Wagering Facility employees with Employee CBID E25.
- California Conservation Corps employees.
- Judges, Legislators and Constitutional Officers, Employee CBIDs = E90, E91 and E92.

The following employees will have a computer generated OPEB CBID that is different from their Employee CBID.

- Additional Exempt and Excluded Classifications Prefunding OPEB with a Bargaining Unit’ for which a link exists [CalHR 1422 - OPEB Prefunding](#). This group includes specific class codes for which the employee’s Employee CBID = E97, E98 or E99 and OPEB CBID is aligned with bargaining unit 5, 6, 7 or 8.
- Employees with M99 Employee CBID and class code 0011 will have an OPEB CBID = M01.
- Specific CEA employees for which their OPEB eligibility is aligned with a specific bargaining unit.
 - This determination is made at the time the CEA appointment is approved for a very small number of employees. When this occurs, CalHR communicates the information with the department and with PPSD.

Please direct questions related to OPEB CBID as follows:

SUBJECT AREA	CONTACT	TELEPHONE NUMBER
General Payroll Procedures Disability Payroll Procedures Employment History Procedures	Statewide Customer Contact Center	(916) 372-7200

MR:RK:PMAB