



Edmund G. Brown Jr.
Governor

August 29, 2012

To: Voluntary Plan Employers and Third Party Administrators

Subject: **GENERAL RELEASE LETTER REGARDING STATE DISABILITY INSURANCE (SDI) ONLINE**

This letter provides Voluntary Plan (VP) employers and Third Party Administrators (TPA) information and instructions for use of the Employment Development Department's (EDD) new State Disability Insurance (SDI) Online system scheduled for release in Fall 2012.

User Benefits

The new SDI Online system, allows claimants, medical providers, employers, VP employers, and TPA the option to submit and receive certain Disability Insurance and Paid Family Leave claim information online. Once the user's initial registration is completed, the system will be easy to use.

When SDI Online is released, VP employers and TPA will be able to access the following services:

1. Submit Notice of Voluntary Plan Claims Filed (Form DE2523) to the EDD.
The VP employers/TPA will be able to use the system to electronically submit both the opening and closeout of the Report of Voluntary Plan Disability Claim form (DE 2523) to the EDD and request the benefit payment award information, if applicable. SDI Online is designed to provide the award information within 24 hours in most cases. The DE 2523 close out reports can be submitted to the EDD online upon final claim payment. (VP employers/TPA who have not been granted access to the online system can continue to use the existing manual processes to submit the DE 2523 forms but may not be able to receive award information within the shorter timeframe provided by online filing.)
2. Receive EDD Disputed Coverage (DE 5022) Referrals to VP Employers.
The EDD will be able to submit this form to VP employers/TPA online and they will be able to use the system to respond to EDD referrals.

3. Submit questions to the EDD.

Employers can submit questions and receive a response pertaining to a claim filed using SDI Online. Employers can use a common SDI Online inbox that can be accessed by multiple users. To submit questions, click on the **contact us** hyperlink located on the home page under the main menu.

4. Regarding Voluntary Plan Disputed Coverage Referrals to the EDD.

VP employers/TPA cannot submit disputed coverage referrals electronically using the SDI Online system. The current manual process to submit disputed coverage claims to the EDD will continue.

SDI Online Username and Password Request Procedures

Prior to using SDI Online services, VP employers and/or authorized TPA must request a username and a temporary password from the EDD. Complete and e-mail the enclosed *EDD SDI Online Username Tracking Matrix* to VPSDIOnlineRegistration@edd.ca.gov.

An employer can request as many user names as needed. An employer who uses a TPA to process claims has the option to assign all user names to the TPA or retain some for its own use.

Additionally, an employer who uses a TPA to process claims can assign the task of completing the *EDD SDI Online Username Tracking Matrix* to the TPA. However, the employer is ultimately responsible for the activities of all its users in SDI Online and must notify the EDD of any changes.

The definitions below are provided to assist with completing the attached *EDD SDI Online Username Tracking Matrix*.

Username: A unique identifier that meets the following criteria:

- Minimum length of 8 characters
- Maximum length of 15 characters
- Can contain both letters (alpha) and digits
- Cannot contain special characters such as (! @ # \$ % ^)
- Example which meets username criteria: JaneDoe10

E-mail Address: Business e-mail address

First and Last name: Owner, Partner or Officer

VP Employer: VP employers name

Employer Account Number: Employers account number

VP Account Number: Employers voluntary plan number

After the EDD receives the completed *EDD SDI Online Username Tracking Matrix*, the VP employer will receive an e-mail response from the EDD.

If the username is approved, the VP employer will receive the username along with a temporary password. If the username is not approved, the VP employer will be instructed to re-submit a new username to the EDD for approval.

The EDD DI VP Section will be available to assist VP employers to setup a username or to reset a password. Please call Steve Hung at 916 657-5083.

Questions regarding this Special General Release Letter may be directed to Victor Young at 916-654-9248, or Chris Okugo at 916-654-8250.

Sincerely,

A handwritten signature in black ink, appearing to read "Elizabeth Wahnnon", with a long horizontal flourish extending to the right.

ELIZABETH WAHNON
Deputy Director
Disability Insurance Branch

Enclosure

