

**SDI ONLINE TUTORIAL** 

# File a Disability Claim

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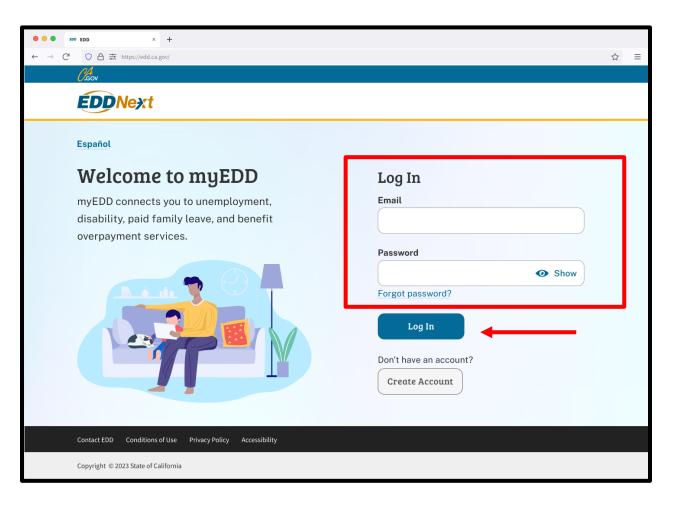
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## File a Disability Insurance Claim

Learn more about how to file a claim for disability benefits.

**Get Started** 



#### Note

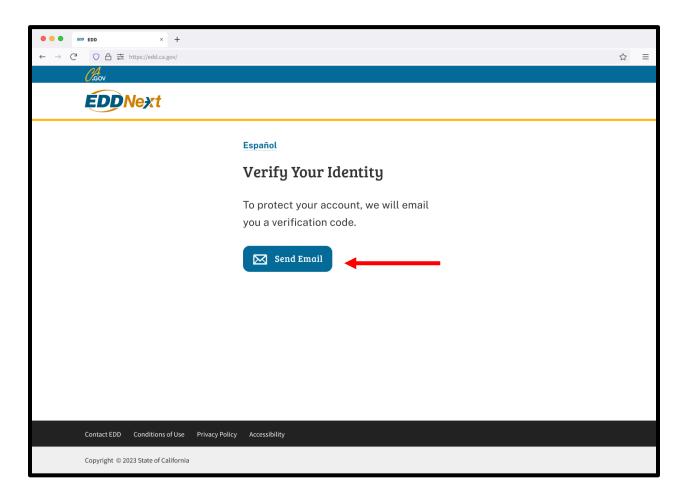
For Spanish, select **Español**.

#### **Important**

We lock your account for one hour after too many failed attempts to enter your password. You can wait one hour to try again or reset your password.

Log in to myEDD to access SDI Online and file a disability claim:

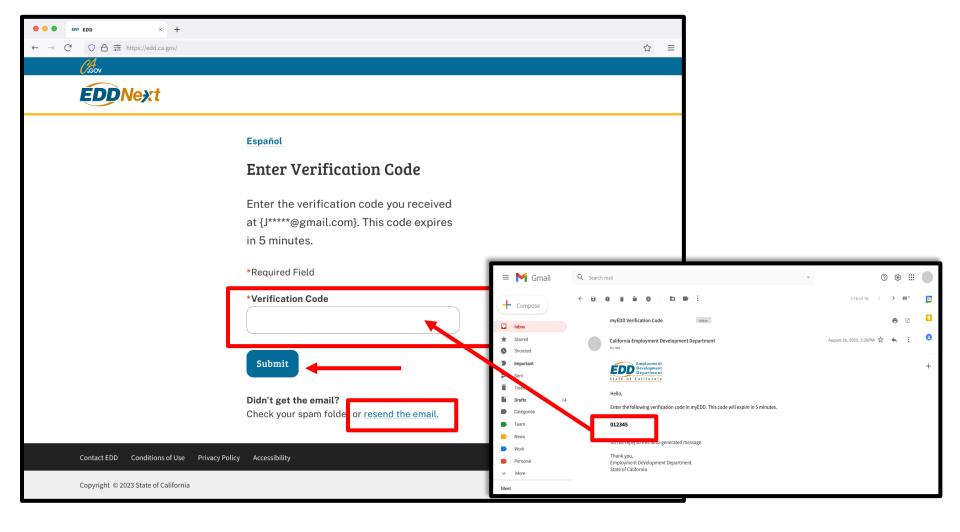
- Visit <u>myEDD</u>.
- 2. Enter the email and password used to create you myEDD account.
- 3. Select Log In.



To protect your account, we ask you to verify your identity every time you log in. In this example, the identity verification option is by email.

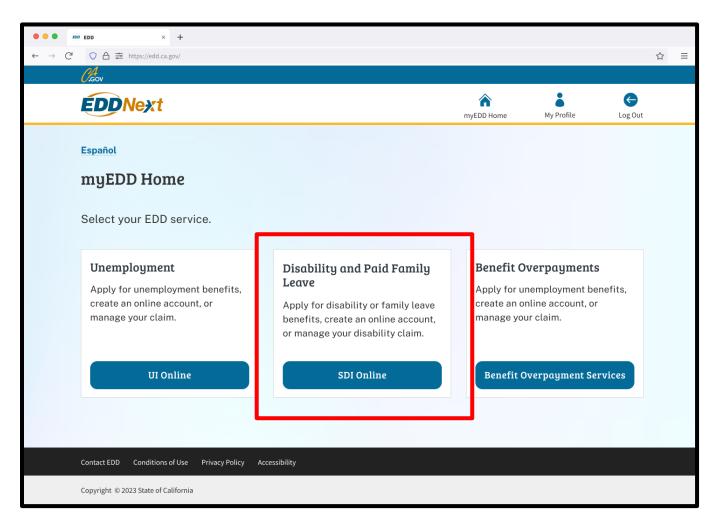
#### Select Send Email.

If you set up the login verification option as text message or phone call, follow the instructions based on that option.

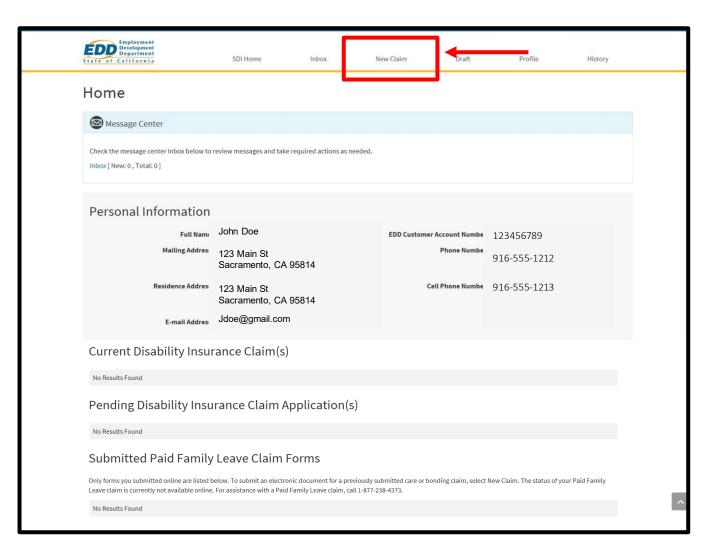


Check your email for your verification code. This code expires in five minutes. Check your spam or junk folder if you do not get this email.

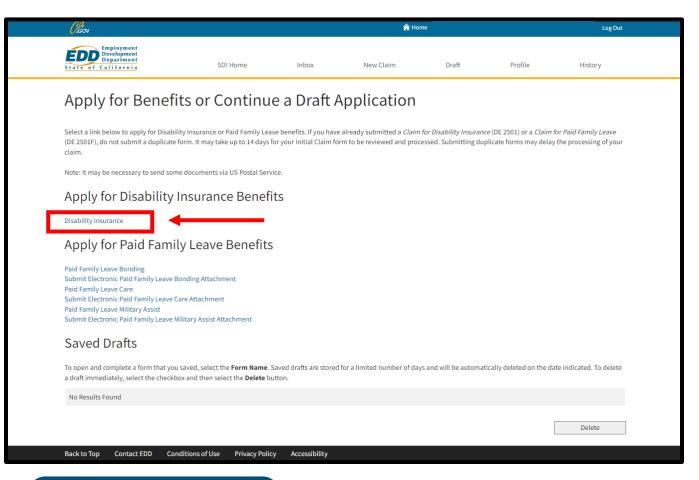
- Enter your verification code and select Submit.
- Select resend the email if you do not get a code.



From the myEDD homepage, select SDI Online.



Select New Claim from the main menu.



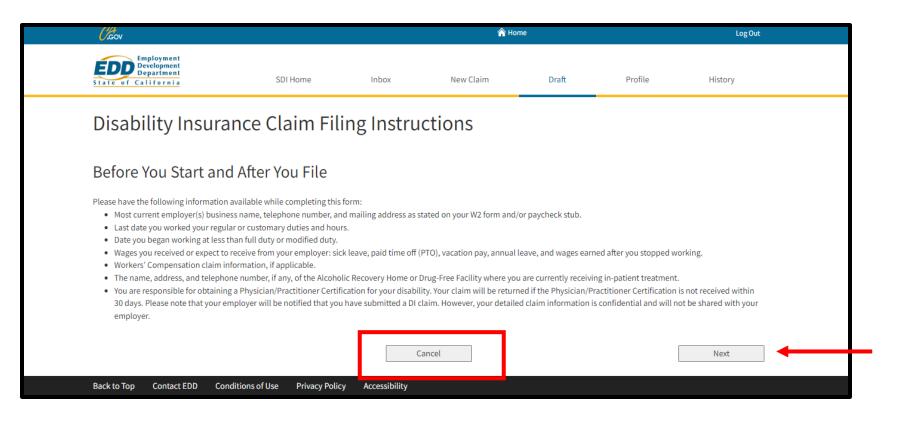
Select **Disability Insurance** under
Apply for Disability
Insurance Benefits
to complete your
section of the
disability
application.

#### Note

Submit your claim no earlier than the first day your disability begins, but no later than 49 days after your disability begins, or you may lose benefits.

#### **Important**

If you already submitted a claim, do not submit another claim. It can take up to 14 days for your claim to be reviewed and processed.

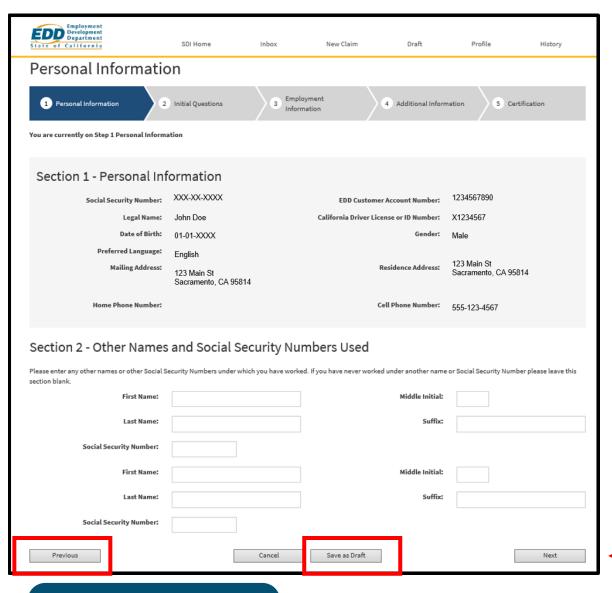


Review the Disability Insurance Claim Filing Instructions screen. It has important information you need to file a disability claim.

Select **Next** to continue.

#### Note

Selecting **Cancel** at any time will cancel the claim and return you to your SDI Online homepage.



The system automatically fills certain fields of the application.

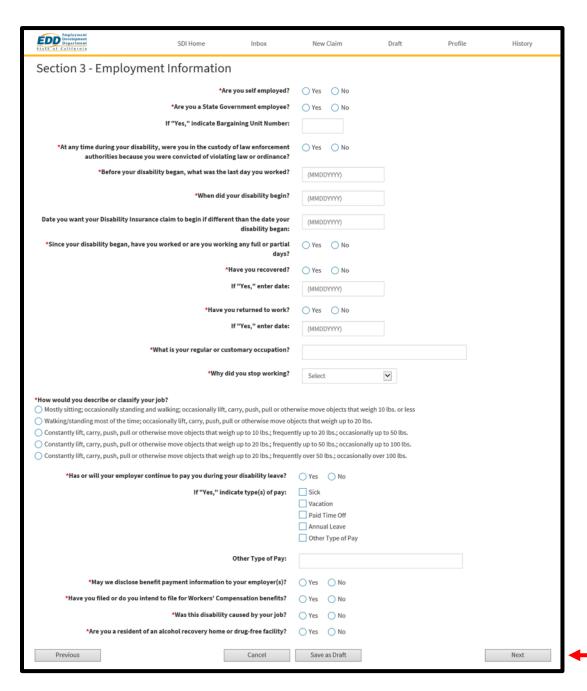
Verify the information in Section 1 and complete any open fields in Section 2, as appropriate.

If your personal information has changed, select **Save as Draft** and update your SDI Online profile.

Select **Next** to move to the next step.

#### Note

Select **Save as Draft** at any time to complete the form later. Select **Previous** to return to the previous screen. **Do not** use your browsers "back" button.

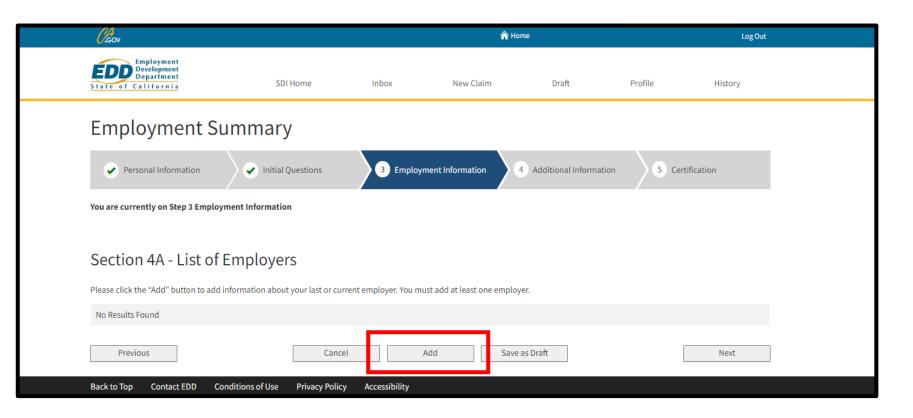


Complete Section 3 - Employment Information.

 Make sure all dates and information are correct to avoid a delay of benefits.

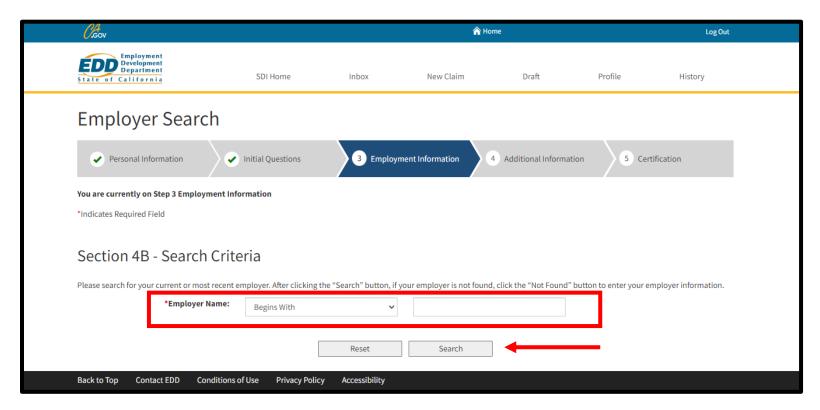
You must complete the fields marked with a red asterisk (\*).

Select Next.



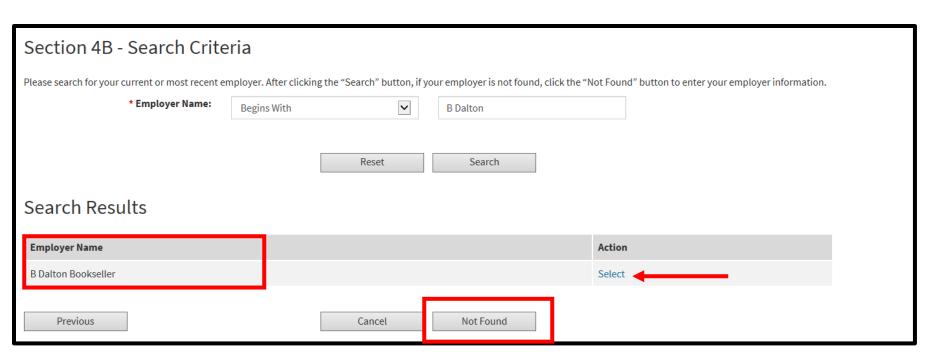
Select Add to enter information about your current employer.

You must add at least one employer to continue.



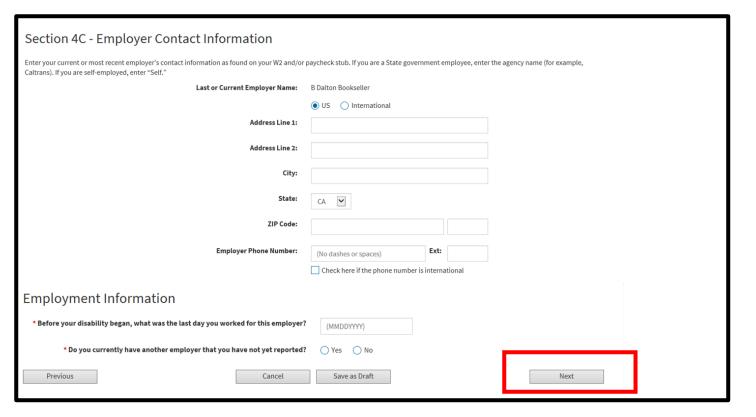
To search for your employer, select a search option. Search options include "Begins With," "Exact," and "Sounds Like."

- Enter your employer's name as shown on your W-2 or paystub.
- Select Search to continue.



If your employer's name populates in the Search Results table, click **Select** under the Action column.

If your employer is not listed under Search Results, select **Not Found** and skip to page 17.



If you selected your employer from the search results in Section 4B, you are asked to complete the Employer Contact Information and Employment Information sections (if you selected **Not Found** in Section 4B, skip to the next page).

- Add your current employer's business name, phone number, and mailing address as shown on your W-2 or paystub. If unsure what address to enter, ask your employer.
- If you have more than one employer, enter additional employers by selecting Yes to "Do you currently have another employer that you have not yet reported?"

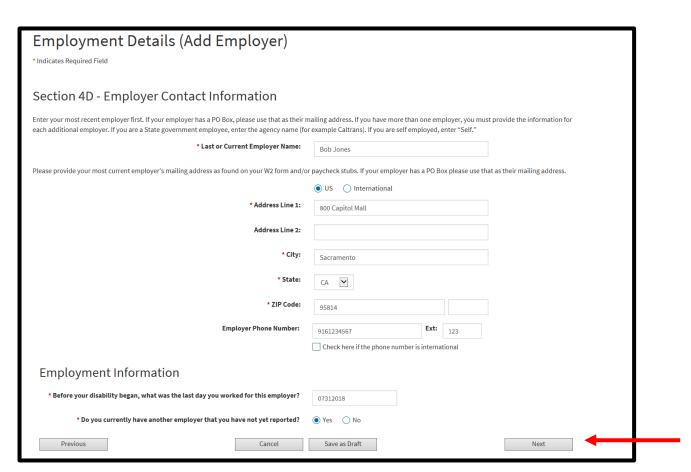
Select Next.

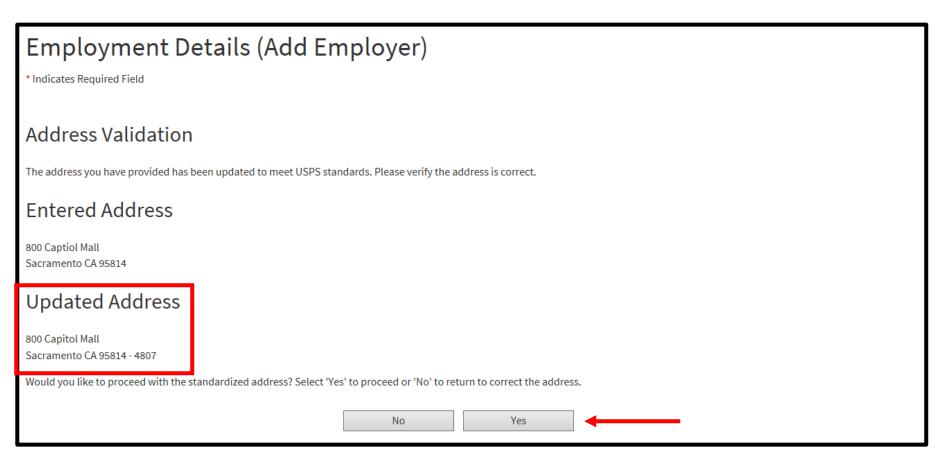
If you selected **Not Found** in Section 4B, add your current employer's business name, phone number, and mailing address as shown on your W-2 or paystub under Section 4D – Employer Contact Information. If unsure what address to enter, ask your employer.

 To enter additional employers, select Yes to "Do you currently have another employer that you have not yet reported?"

You must complete the fields marked with a red asterisk (\*).

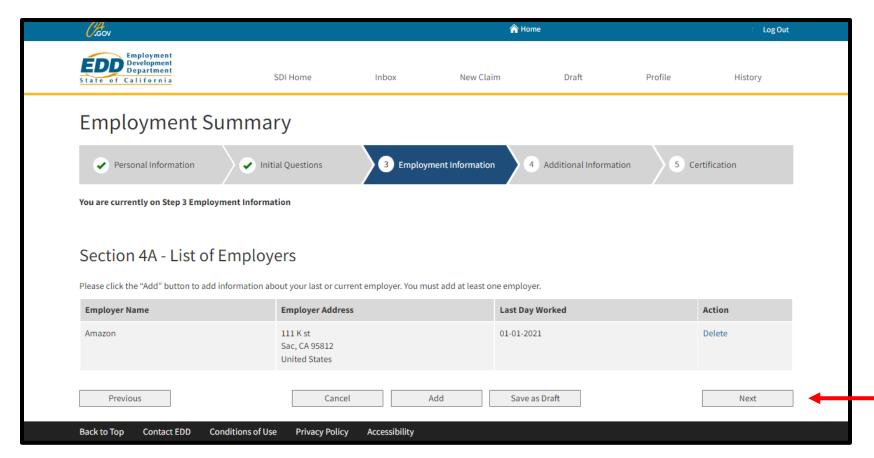
Select Next.





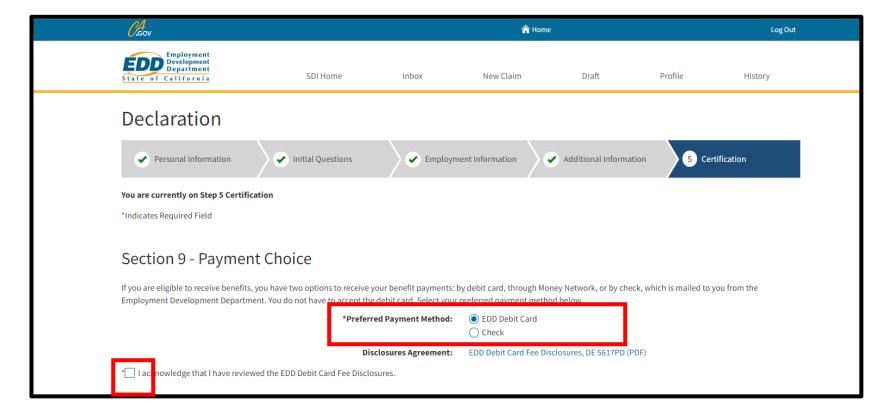
The system may adjust the employer address to follow USPS standards.

- Select Yes to confirm the Updated Address section is correct.
- Select No to go back to the previous screen and re-enter the address.



Once you add all your current employers, review the information listed under Section 4A – List of Employers.

- Select Next if everything is correct.
- Select **Delete** under the Action column if your employer's information is incorrect.



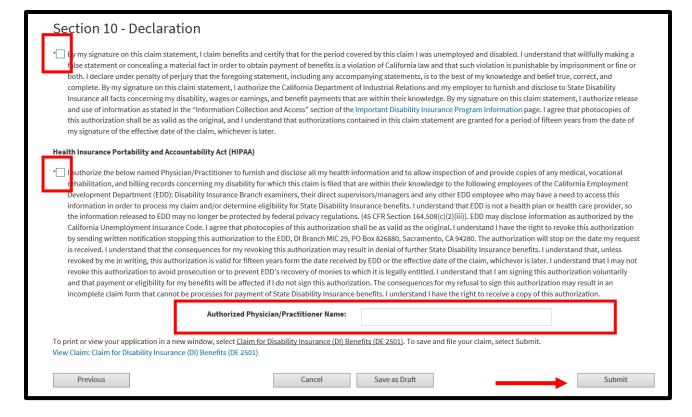
Complete Section 9 - Payment Choice to select how you want to get benefit payments from the options listed.

Select the I acknowledge box to confirm you have reviewed the disclosures.

In Section 10 –
Declaration, select
both boxes to
authorize an
electronic signature
and release of
information. Both
boxes must be
selected to complete
your claim.

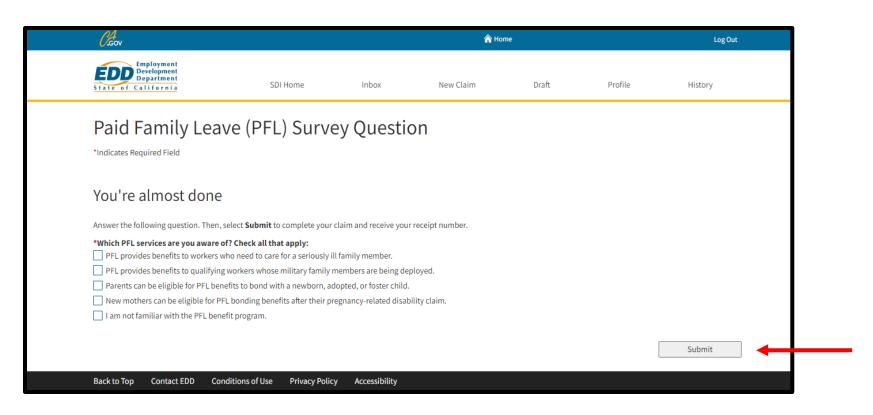
Enter the name of your licensed health professional in the Authorized Physician/Practitioner Name field.

Select **Submit** to send your claim to us.

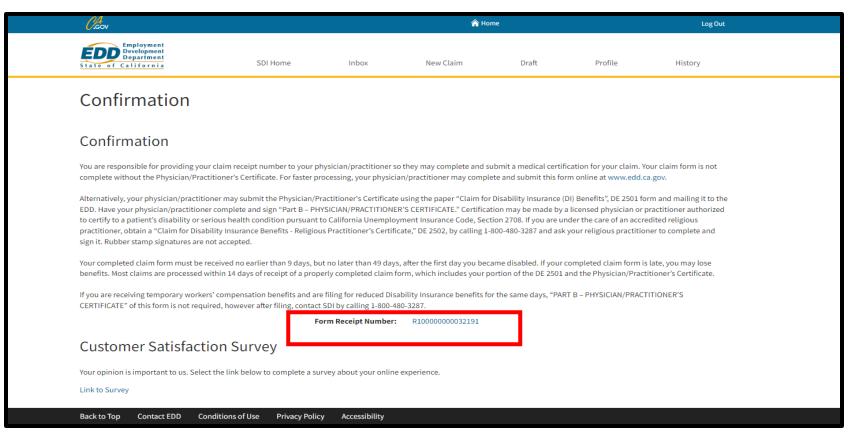


#### **Important**

You cannot modify the form after you select Submit.



Complete the survey and select Submit.



Your claim is assigned a Form Receipt Number on the confirmation screen.

#### Note

Save this number and give it to your licensed health professional so they can submit the medical certification.

#### **Important**

Your claim is not complete. Your licensed health professional can complete the medical certificate through SDI Online or by completing Part B of the paper *Claim for Disability Insurance (DI) Benefits* (DE 2501) form.



## Complete Paper Claim Forms

Learn more about how to complete and submit a paper claim form for disability benefits.

**Get Started** 

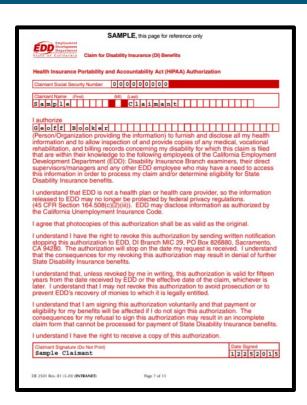
## Complete the *Claim for Disability Insurance (DI)*Benefits (DE 2501) to apply for disability benefits

Your claim is considered complete when both parts of the DE 2501 form are submitted:

- Part A Claimant's Statement (pages 1-4)
- Part B Physician/Practitioner's Medical Certificate (pages 5-7)

#### **Important**

If you already applied online, do not file a paper claim form. It can delay benefits.

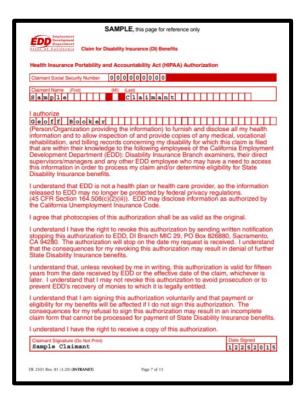


#### SAMPLE

Claim for Disability Insurance (DI) Benefits (DE 2501)

### How to get a paper DE 2501 form

- Order a <u>form online</u> to have it mailed to you.
- Visit an SDI Office.
- Call 1-800-480-3287 to request a paper form be mailed to you.
- Get the form from your licensed health professional or employer.



#### SAMPLE

Claim for Disability Insurance (DI) Benefits (DE 2501)

## To avoid delays when completing your paper claim form

Do

- Use black ink only.
- Type or write clearly within the boxes provided.
- Mail the completed form in the preaddressed envelope provided.

Don't

- Do not send photocopied or faxed forms.
- Do not mail the paper form if you already filed a claim online.

#### **SAMPLE**, this page for reference only



Claim for Disability Insurance (DI) Benefits

#### Health Insurance Portability and Accountability Act (HIPAA) Authorization

Claimant Social Security Number	00000000
Claimant Name (First)	(MI) (Last)
Sample	Claimant

#### I authorize

#### 

(Person/Organization providing the information) to furnish and disclose all my health information and to allow inspection of and provide copies of any medical, vocational rehabilitation, and billing records concerning my disability for which this claim is filed that are within their knowledge to the following employees of the California Employment Development Department (EDD): Disability Insurance Branch examiners, their direct supervisors/managers and any other EDD employee who may have a need to access this information in order to process my claim and/or determine eligibility for State Disability Insurance benefits.

I understand that EDD is not a health plan or health care provider, so the information released to EDD may no longer be protected by federal privacy regulations. (45 CFR Section 164.508(c)(2)(iii)). EDD may disclose information as authorized by the California Unemployment Insurance Code.

I agree that photocopies of this authorization shall be as valid as the original.

I understand I have the right to revoke this authorization by sending written notification stopping this authorization to EDD, DI Branch MIC 29, PO Box 826880, Sacramento, CA 94280. The authorization will stop on the date my request is received. I understand that the consequences for my revoking this authorization may result in denial of further State Disability Insurance benefits.

I understand that, unless revoked by me in writing, this authorization is valid for fifteen years from the date received by EDD or the effective date of the claim, whichever is later. I understand that I may not revoke this authorization to avoid prosecution or to prevent EDD's recovery of monies to which it is legally entitled.

I understand that I am signing this authorization voluntarily and that payment or eligibility for my benefits will be affected if I do not sign this authorization. The consequences for my refusal to sign this authorization may result in an incomplete claim form that cannot be processed for payment of State Disability Insurance benefits.

I understand I have the right to receive a copy of this authorization.

Claimant Signature (Do Not Print)	Date Signed
Sample Claimant	1 2 2 5 2 0 1 5

## Claim for Disability Insurance (DI) Benefits (DE 2501) - Page 1

Health Insurance Portability and Accountability Act (HIPAA)
Authorization form.

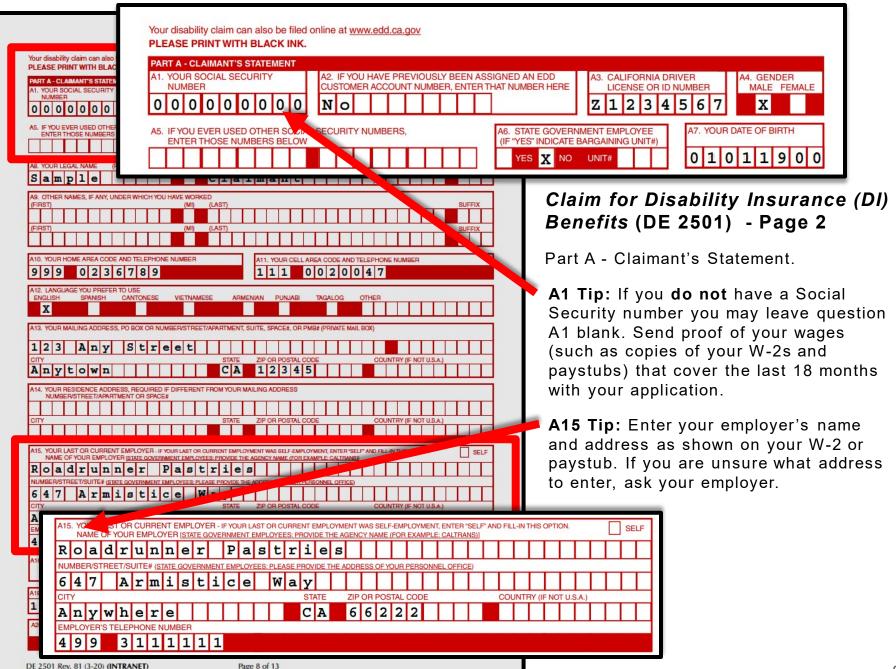
Sign and date the HIPAA
 Authorization and enter the
 name of your licensed health
 professional.

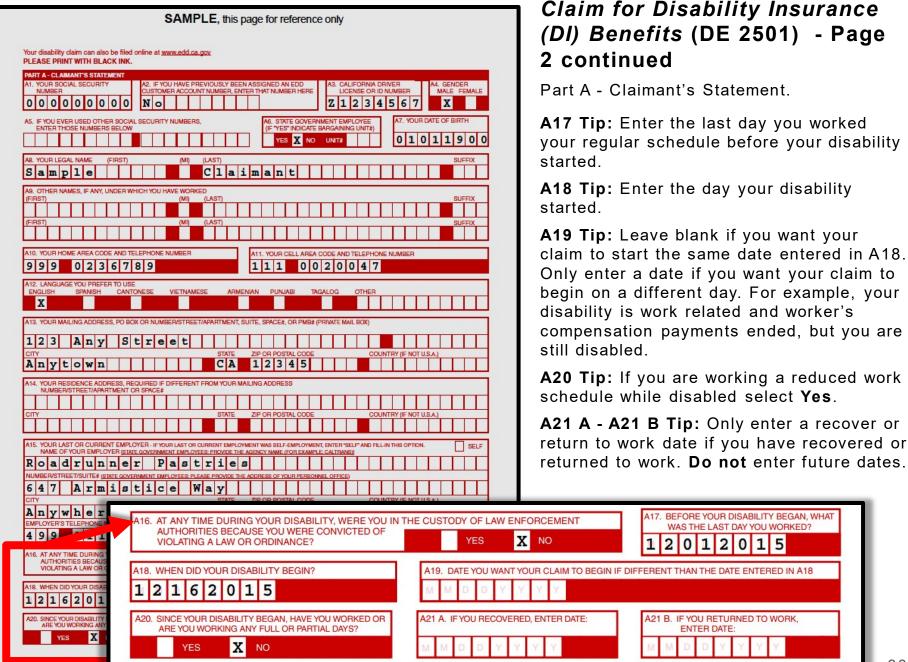
You must complete all questions on pages 1-4.

#### Note

The application comes with important claim information, filing instructions, and debit card fee disclosures.

Review all information before completing your paper claim form.





#### SAMPLE, this page for reference only A - CLAIMANT'S STATEMENT - CONTINUED 0 0 0 0 0 0 0 0 0 PLEASE RE-ENTER YOUR SOCIAL SECURITY NUMBER Pastry Chef Ma: UNPAID LEAVE OF ABSENCE VOLUNTARILY QUIT OR RETIRED TERMINATED OTHER REASON ☐ Ma A25. HOW WOULD YOU DESCRIBE OR CLASSIFY YOUR JOB Mostly sit; occasionally stand or walk; occasionally lift, carry, push, pull, or otherwise move objects that weigh 10 lbs. or less. Car X Con Mostly walk/stand; occasionally lift, carry, push, pull, or otherwise move objects that weigh up to 20 lbs Constantly lift, carry, push, pull, or otherwise move objects that weigh up to 10 lbs.; frequently up to 20 lbs.; occasionally up to 50 lbs. Constantly lift, carry, push, pull, or otherwise move objects that weigh up to 20 lbs.; frequently up to 50 lbs.; occasionally up to 100 lbs Constantly lift, carry, push, pull, or otherwise move objects that weigh over 20 lbs.; frequently over 50 lbs.; occasionally over 100 lbs A26. IF YOUR EMPLOYER(S) CONTINUED OR WILL CONTINUE TO PAY YOU DURING YOUR DISABILITY, INDICATE INFORMATION TO YOUR EMPLOYER(S) A28. SECOND EMPLOYER NAME (IF YOU HAVE MORE THAN ONE EMPLOYER Cosmic Cookies 4 | 6 | 9 | Thrifty STATE ZIP OR POSTAL CODE 1 2 1 6 2 0 1 5 ZIP OR POSTAL CODE AREA CODE AND TELEPHONE NUMBER A32. WAS THIS DISABILITY CAUSED BY YOUR JOB? Page 9 of 13 DE 2501 Rev. 81 (3-20) (INTRANET)

## Claim for Disability Insurance (DI) Benefits (DE 2501) - Page 3

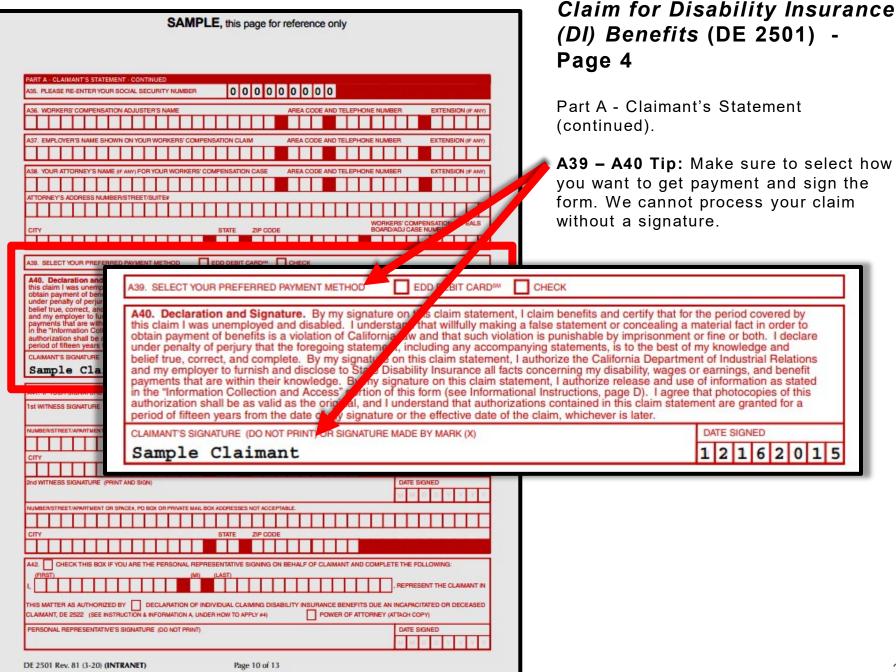
Part A - Claimant's Statement (continued).

**A24 Tip:** Tell us why you stopped working. If it was because of your disability, select **illness**, **injury**, **or pregnancy**. If you left work for reasons other than your disability, select the appropriate box.

A26 Tip: If your employer continues to pay you while getting disability benefits, select the type of pay. If your employer will supplement benefits with your paid leave, select other and write in "integrate." If not, select the appropriate box.

**A27 Tip:** If your employer supplements benefits with your paid leave, they can only get payment information from us if you select **Yes.** We will not release confidential claim information.

A31 – A 32 Tip: Do not forget to answer both questions. If the disability is not work related, select No to both.



SAMPLE, this page for reference only
Claim for Disability Insurance (DI) Benefits - Physician/Practitioner's Certificate PLEASE PRINT WITH BLACK INK.
PART B - PHYSICIAN/PRACTITIONER'S CERTIFICATE
B1. PATIENT'S SOCIAL SECURITY NUMBER 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
B3. IF YOU KNOW THE PATIENT'S ELECTRONIC RECEIPT NUMBER, ENTER IT HERE:  B4. PATIENT'S DATE OF BIRTH  D 1 0 1 1 9 0 0
B5. PATIENT'S NAME (FIRST) (MI) (LAST)  S a m p 1 e C 1 a i m a n t
B8. PHYSICIAN/PRACTITIONER'S LICENSE NUMBER  B7. STATE OR COUNTRY (F NOT U.S.A.) THAT ISSUED LICENSE NUMBER ENTERED IN B8  STATE C A COUNTRY
B8. PHYSICIANPRACTITIONER LICENSE TYPE  B9. SPECIALTY (IF ANY)
B10. PHYSICIANPRACTITIONER'S NAME AS SHOWN ON LICENSE (FIRST).  Geoff
B11. PHYSICIAN/PRACTITIONER'S ADDRESS MAILING ADDRESS, PO BOX OR NUMBER/STREET/SUITE#  2 6 9 C 0 m m e r c e  CITY  STATE ZIP OR POSTAL CODE  COUNTRY (IF NOT U.S.A.)  A n y w h e r e  C A 7 2 6 9 4  COUNTRY HOSPITAL/GOVENMENT FACILITY ADDRESS FACILITY NAME (IF APPLICABLE)  FACILITY ADDRESS, NUMBER/STREET/SUITE#  CITY  STATE ZIP OR POSTAL CODE  COUNTRY (IF NOT U.S.A.)  B12. THIS PATIENT HAS BEEN UNDER MY CARE AND TREATMENT FOR THIS MEDICAL PROBLEM FROM 1 2 1 6 2 0 1 5 TO M M D D Y Y Y Y X CHECK HERE TO INDICATE YOU ARE STILL TREATING THE PATIENT  AT INTERVALS OF: DAILY WEEKLY X MONTHLY AS NEEDED OTHER  B13. AT ANY TIME DURING YOUR ATTENDANCE FOR THIS MEDICAL PROBLEM, HAS THE PATIENT BEEN INCAPABLE OF PERFORMING HIS/HER REGULAR OR CUSTOMARY WORK?  X YES-ENTER DATE DISABILITY BEGAN 1 2 1 6 2 0 1 5  NO-SKIP TO B83
MAS THE DISABILITY CAUSED BY AN ACCIDENT ON THACMAY
("UNINDOWN", "NIDEFINITE", ETC., NOT ACCEPTABLE.)  GHECK HERE TO INDICATE PATIENT'S DISABILITY IS PERMANENT AND YOU NEVER ANTICIPATE RELEASING PATIENT TO RETURN TO HIS/HER REGULAR OR CUSTOMARY WORK
B15. IF PATIENT IS NOW PREGNANT OR HAS BEEN PREGNANT, PLEASE CHECK THE APPROPRIATE BOX AND ENTER THE FOLLOWING:  ESTIMATED DELIVERY DATE:   M   M   D   D   V   V   V   V   V   V   V   V
TYPE OF DELIVERY, IF PATIENT HAS DELIVERED: VAGINAL CESAREAN
DE 2501 Rev. 81 (3-20) (INTRANET) Page 11 of 13

## Claim for Disability Insurance (DI) Benefits (DE 2501) - Pages 5-7

Part B - Physician/Practitioner's Certificate.

Your licensed health professional must complete all relevant information including treatment dates, diagnosis, and medical codes. The licensed health professional must also sign the form.

- If you complete your portion online, enter the Receipt Number provided on the Confirmation screen in question B3 and give the form to your doctor.
- If your doctor will complete their portion online, send your claim form to us first and allow 5 business days for mailing. Then, contact your doctor and they can complete their medical certificate through SDI Online.

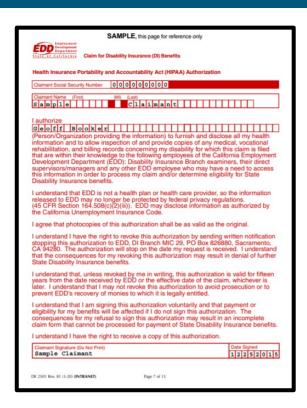
## Mail in your completed claim form

Use the pre-addressed envelope to mail to:

State of California Employment Development Department PO Box 989777 West Sacramento, CA 95798-9777

Do not submit the same claim more than once. This can delay your benefits.

Allow at least 14 days for processing once we get Part A and Part B of the DE 2501 form.



#### SAMPLE

Claim for Disability Insurance (DI) Benefits (DE 2501)

### **CONTACT US**

### 1-800-480-3287











**Accessibility** 

Language Resources

- Follow us -

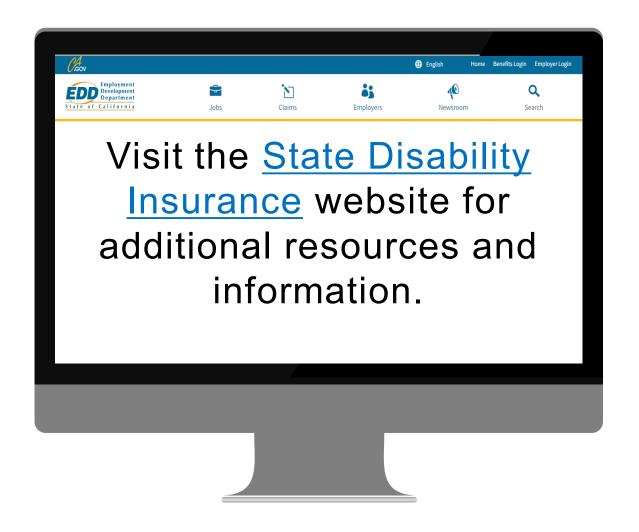












The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Requests for services, aids, and alternate formats need to be made by calling 1-866-490-8879 (voice), or through the California Relay Service at 711.