



Edmund G. Brown Jr.  
Governor

Date: December 11, 2012

To: Voluntary Plan Self-Insurers

Subject: GENERAL RELEASE LETTER FOR 2013

The General Release (GR) letter provides information on recent legislation, regulations, and procedural changes that affect your voluntary plan (VP) for the 2013 calendar year. The GR letter outlines actions needed to ensure continued approval of your plan.

You can access information about State Disability Insurance (SDI), the Paid Family Leave (PFL) program, and the Voluntary Plan Group (VPG) on the Disability Insurance Web page at [www.edd.ca.gov/disability](http://www.edd.ca.gov/disability).

If you have a new third party administrator (TPA), or new VP corporate contacts, please notify the Employment Development Department (EDD). See Attachment 2 for the VP Administrative Changes form.

For assistance with your VP, contact us at 916-653-6839, or see the "Voluntary Plan Group Contacts" on page 7 where you will find the appropriate staff for your questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Elizabeth Wahnnon".

ELIZABETH WAHNON  
Deputy Director  
Disability Insurance Branch

Attachments

29:101gl

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## **Acronyms**

- CA California
- CCR California Code of Regulations, Title 22
- CUIC California Unemployment Insurance Code
- DI Disability Insurance
- DIA Disability Insurance Automation
- DIVP Disability Insurance Voluntary Plan
- EDD Employment Development Department
- EAN Employer Account Number
- ER Employer
- FMLA Family and Medical Leave Act
- FTDI Family Temporary Disability Insurance
- GR General Release
- HIPAA Health Insurance Portability and Accountability Act
- IME Independent Medical Examination
- MBA Maximum Benefit Amount
- PFL Paid Family Leave
- SDI State Disability Insurance
- TPA Third Party Administrator(s)
- UI Unemployment Insurance
- UCD Unemployment Compensation Disability
- VP Voluntary Plan
- VPAG Voluntary Plan Advisory Group
- VPDI Voluntary Plan Disability Insurance (Claim)
- VPFL Voluntary Plan Paid Family Leave (Claim)
- VPG Voluntary Plan Group
- WBA Weekly Benefit Amount

## 1. 2013 Legislation/Regulations Update

**Assembly Bill 2039 – Family and Medical Leave** would increase the circumstances under which an employee is entitled to protected leave pursuant to the Moore-Brown-Roberti Family Rights Act by eliminating the age and dependency elements from the definition of “child,” thereby permitting an employee to take protected leave to care for his or her independent adult child suffering from a serious health condition; expanding the definition of “parent” to include an employee’s parent-in-law; and permitting an employee to also take leave to care for a seriously ill grandparent, sibling, grandchild, or domestic partner, as defined.

**Reference:** An act to amend Section 12945.2 of the Government Code.

**Status:** 8/16/12 – In Senate Appropriations Committee; Held under submission.

**NOTE:** This bill would expand protected leave rights for employees under the California Family Rights Act, but would not impact eligibility for PFL benefits or the administration of the SDI program.

**Senate Bill 1438 – Long-Term Care Insurance** would require the Insurance Commissioner to convene a task force composed of specified stakeholders and representatives of government agencies to examine the components necessary to design a statewide long-term care insurance program, as specified, and to report findings to the Governor and Legislature.

**Reference:** An act to add and repeal Section 10234.75 of the Insurance Code.

**Status:** 5/24/12 – In Senate Appropriations Committee; Held under submission.

Detailed California Legislative information is available at the following website:  
<http://leginfo.legislature.ca.gov/>

## 2. Contribution Rate and Wage Ceiling

Effective January 1, 2013, the SDI worker contribution rate will remain **1.0 percent** of an employee’s gross taxable wages up to \$100,880. The taxable wage ceiling was \$93,316 in 2011, increased to \$95,585 in 2012, and has increased to \$100,880 for 2013.

**Reference: California Unemployment Insurance Code (CUIC) Section 984**

The SDI program taxes covered employees up to a ceiling set by Section 985 of the CUIC. The 2013 SDI taxable wage ceiling (the maximum amount of wages per employee that are subject to SDI contributions) will be \$100,880. The maximum annual contribution per employee for 2013 will be \$1008.80 (\$100,880 x 1.0 percent). Employers report these contributions to the EDD Tax Branch on the Quarterly Contribution Return, DE 3D, line D, box D1 Voluntary Plan.

**Reference: CUIC Section 985**

### 3. Voluntary Plan Assessment Rate

Effective January 1, 2013, the VP assessment rate (on line K of the Quarterly Contribution Return, Form DE 3D) will remain at **0.140 percent** (0.0014). This figure is the product obtained by multiplying the worker contribution rate by 14 percent, or  $1.0 \times 0.14 = 0.140$  percent.

**Reference: CUIC Section 3252[b]**

Employers using a voluntary plan must remit payments along with their employment tax payments. Employers may pay the assessment out of their corporate funds, or charge it to the VP trust fund. When charged to the VP trust fund, the expenditure must be shown on the Annual Report of Self-Insured Voluntary Plan Transactions, Form DE 2568V Rev. 21 (11-08), and be submitted to the Voluntary Plan Group (VPG).

### 4. Calendar of Required Actions for the Year 2013

**Effective Immediately:**

VP Text Amendments Require Immediate Notification of Employees.

The law requires that immediate notification be given to covered employees of any VP amendments no later than the effective date of the amendment. The notice of the amendment should include notification of the right to withdraw from the VP as of the effective date of the amendment. The VP is also required to notify immediately the EDD of any plan text changes as well.

**Reference: CUIC Section 3271[a]**

- Please submit all plan text amendments to the Voluntary Plan Group for approval by February 15, 2013.

**By January 1, 2013:**

- Provide written notice to your VP employees of the maximum weekly benefit amount (WBA) of \$1,067 and maximum benefit amount (MBA) of \$55,484 and any other plan changes. A notice of benefit changes is not necessary, if your VP already provides a higher WBA and MBA.
- Notify VP and SDI covered employees that the contribution rate last year of 1.0 percent of taxable wages remains, but the taxable wage ceiling increases to \$100,880 in 2013. VP employers may decrease their VP contribution rate and VP taxable wage ceiling to levels lower than the SDI contribution rate and SDI tax ceiling. Please note, however, that the \$100,880 taxable wage ceiling applies to both SDI and VP wages reported on line D1 Voluntary Plan and D2 State Plan, Quarterly Contribution Return, Form DE 3D. (See "Contribution Rate and Wage Ceiling", page 1)

**By February 15, 2013:**

- For all changes to your VP, please provide the VPG with written documentation describing all amendments made to your 2013 plan. Include a copy of the employee notice informing employees of any rate changes and/or plan amendments.
- Complete and return to the VPG the attached “Voluntary Plan 2013 Security Review” worksheet, Attachment 1, outlining proposed changes to your security deposit, along with required documents.
- Complete and return to the VPG the “Voluntary Plan Administrative Changes” information sheet, Attachment 2, only if you have changes to report.
- Download, complete, and return the Annual Report of Self-Insured VP Transactions, Form DE 2568V Rev. 21 (11-08) for calendar year 2012 to the VPG, by February 15, 2013. Employers can obtain the DE 2568V on the EDD website at: [http://www.edd.ca.gov/pdf\\_pub\\_ctr/de2568v.pdf](http://www.edd.ca.gov/pdf_pub_ctr/de2568v.pdf) .
- The DE 2568V Rev. 21 (11-08) can be submitted to the EDD via e-mail at: [vp68v@edd.ca.gov](mailto:vp68v@edd.ca.gov).

**Reference: California Code of Regulations (CCR) Title 22 Section 3267-2**

- Mail hard copies of the DE 2568V to:  
  
EDD, Disability Insurance Branch  
Voluntary Plan Group  
P.O. Box 826880, MIC 29VP  
Sacramento, CA 94280-0001
- Fax hard copies of the DE 2568V to 916-653-6209.

**NOTE:** Use the most recent version of the form, DE 2568V Rev. 21 (11-08). Using an old version may cause it to be returned as incomplete. You must use the most recent version of the form and make sure all fields are filled in with the correct information. If a field is not applicable, enter zero (0) or N/A (not applicable).

**Reference: CUI Section 3271[a]**

## 5. How to Determine When to Increase/Decrease a Security Deposit

- **Making Adjustments to Existing Security Deposits**

The 2013 contribution rate is 1.0 percent of an employee's taxable wages, and the taxable wage ceiling is \$100,880. The amount of your existing security deposit may need to be adjusted due to the contribution rate used in the calculation. We have included a Voluntary Plan 2013 Security Review worksheet, Attachment 1, to assist you with this calculation. Please complete and return the worksheet to the VPG by February 15, 2013, regardless of whether a change was made to your VP security amount.

**Reference: CUIC Section 3258**

If the difference between your existing security and the required amount is more than 5 percent, you must increase your security amount.

EXAMPLE #1:      Required Security Amount:    \$205,000  
                         Existing Security Amount:    \$200,000

Example #1 indicates that the security amount does not need to be increased since the difference between the two amounts is only 2.5 percent.

EXAMPLE #2:      Required Security Amount:    \$219,350  
                         Existing Security Amount:    \$205,000

Example #2 indicates that the difference between the two amounts exceeds 5 percent, thus requiring you to increase the security amount.

Please complete and return the Voluntary Plan 2013 Security Review worksheet with one of the following items to the VPG by February 15, 2013:

- ❖ Guarantee bond rider amendment
- ❖ Letter of credit amendment
- ❖ Cash or bearer bond

**Reference: CCR, Title 22, Section 3258-1; CUIC Section 3258**

## 6. How to Complete the VP 2013 Security Review Worksheet

To complete the worksheet (Attachment 1), first obtain a reasonable estimate of your 2012 taxable wages up to the ceiling amount of \$100,880 per employee, and then calculate the required security amount by applying the following formula:

- 2013 Estimated VP Total Taxable Wages x 0.5 (per CUIC Section 3258) x 1.0 percent (worker contribution rate beginning January 1, 2013) = estimated 2013 security amount.

- Round up to the next even \$100
- Minimum required deposit is \$1,000

EXAMPLE #1: Year 2013 taxable wages = \$1,455,000  
 $(\$1,455,000) \times .5 \times .010 = \$7,275$   
Security deposit should be \$7,300 because you should round up to the next even \$100.

EXAMPLE #2: Year 2013 taxable wages = \$155,000  
 $(\$155,000 \times .5) \times .010 = \$775$   
Security deposit should be rounded up to \$1,000 because the minimum required security deposit is \$1,000.

## 7. Where to Send Your Security Deposit

- **Guarantee Bond or Letter of Credit Deposits**

Send an original and one copy of your guarantee bond or letter of credit to one of the following addresses, depending on mail or in-person delivery:

### **Mailing Address**

EDD, Disability Insurance Branch  
Voluntary Plan Group  
Attention: Security Analyst  
P.O. Box 826880, MIC 29VP  
Sacramento, CA 94280-0001

### **In-Person Delivery Address**

EDD, Disability Insurance Branch  
Voluntary Plan Group  
Attention: Security Analyst  
800 Capitol Mall, Room 3137, MIC 29VP  
Sacramento, CA 95814

## 8. Voluntary Plan Advisory Group

The EDD actively participates in the Voluntary Plan Advisory Group (VPAG). The VPAG consists of VP employers, third party administrators (TPA) and EDD representatives, who meet twice yearly to discuss VP issues and pending legislation, share common concerns, clarify VP claim procedures, and exchange ideas to improve the VP program.

The Spring 2012 VPAG meeting was held on Thursday, April 19, 2012, at the Sacramento Convention Center and hosted by Applied Underwriters Incorporated.

The Fall 2012 VPAG meeting was held on Thursday, October 18, 2012, in Burbank, California and hosted by Disability Services International (DSI).

The next scheduled VPAG meeting will be held on Thursday, April 18, 2013, in San Jose, California and will be hosted by Matrix Absence Management Incorporated.

To join the VPAG, contact Chris Okugo, Manager of the Voluntary Plan Group at 916-654-8250 or e-mail [cokugo@edd.ca.gov](mailto:cokugo@edd.ca.gov).

## **9. General Information**

### **9.1. EDD Tax Questions**

Inquiries regarding employer tax issues should be directed to the EDD Tax Branch. The forms that generate most of these questions are the DE 3D, DE 9, DE 16, and DE 938.

For answers to your tax questions, contact the EDD Tax Branch at the toll free number, 1-888-745-3886 or at 916-464-2500, and ask to speak with the "Auditor of the Day".

### **9.2. SDI Online Registration and EDD Award Notification**

The EDD released the new SDI Online system to external users (claimants, medical providers, VP employers, and others) on October 9, 2012; and notified VP employers about the system in a special General Release (GR) Letter dated September 14, 2012. To see a copy of this letter access the VP Web page at: [http://www.edd.ca.gov/Disability/VP\\_Forms\\_and\\_Publications.htm](http://www.edd.ca.gov/Disability/VP_Forms_and_Publications.htm)

We encourage VP employers and TPAs to register for SDI Online and use the system to submit online VP forms to EDD. Once registered it is very easy to use SDI Online to submit the Report of Voluntary Plan Disability Claim, Form (DE 2523) or Report of Voluntary Plan Paid Family Leave Claim, Form (DE 2523F). If an employer or TPA submits the DE 2523 online to request claimant award information, the system will process the request and within 48 hours post the award information in the SDI Online Inbox of the employer or TPA representative that submitted the request.

One of the benefits of online submission of DE 2523 is the system provides immediate receipt upon successful submission of the form. This provides assurance that the EDD received the form. The response to an online submittal of the DE 2523F is still provided by paper notification.

In addition to using SDI Online to notify employers and TPA of awards, the EDD also uses SDI Online to send Disputed Coverage Claim referrals (form DE 5022) to VP employers or the TPA. The EDD sends the referral to the SDI Online Inbox of the employer or TPA corporate contact person designated in the EDD Voluntary Plan Database responsible for processing VP claims. The employer or TPA has the option of developing the procedures for accessing the SDI Online Inbox to complete the DE 5022 and submit a response to the EDD to accept or deny liability.

(See Attachment 3 for SDI Online Procedures for Voluntary Plans)

### 9.3. EDD Medical Director Contact Information

For medical questions contact:

EDD Medical Director  
800 Capitol Mall, MIC 29 B  
P.O. Box 826880  
Sacramento, CA 94280-0001  
916-654-8621

### 9.4. New VP Database and Changes to VP Number Assignments

The EDD developed a new VP database to link with SDI Online, which allows the system to retrieve employer information when a Disability Insurance claim is filed on SDI Online. The VPG historically used a numbering system for identifying Voluntary Plans that began with a prefix of 99 and a unique four-digit suffix for each plan (99-XXXX). The number of plans has grown to the point of exhausting our current numbering system, so the VPG implemented a new numbering system.

The EDD no longer uses the 99 to identify new VPs. We now use a new numbering system. The new numbering system begins with a prefix of 10 and a four-digit suffix. Unlike the previous numbering system, the prefix and suffix are automatically generated by the new VP database to allow for a larger number of future Voluntary Plans.

The new VP database randomly assigns new VP numbers starting with the sequence of 10-0001 number series. All plans that currently have the 99-XXXX number sequence will retain those numbers.

## 10. Voluntary Plan Group Contacts

VPG staff are always ready to provide you with assistance.

Name	E-mail Address and Phone Number	Functions
<b>Chris Okugo</b>	Chris.Okugo@edd.ca.gov 916-654-8250	<b>Section Manager, Voluntary Plan Section</b>
<b>Victor Young</b>	Victor.Young@edd.ca.gov 916-654-9248	<b>Manager, VP Administration Unit</b>
<b>Phillina Lyles</b>	Phillina.Lyles@edd.ca.gov 916-654-9172	<b>Manager, VP Audit and Compliance Unit</b>
<b>Connie Anderson</b>	Connie.Anderson@edd.ca.gov 916-654-9825	<b>Disputed Coverage (DC) Claims</b>
<b>Darci Hoffman</b>	Darci.Hoffman@edd.ca.gov 916-651-9344	<b>Paid Family Leave (PFL) Claims</b>
<b>James Ellsworth</b>	James.Ellsworth@edd.ca.gov 916-654-8742	<b>DE 2523 Award Information</b>

<b>Name</b>	<b>E-mail Address and Phone Number</b>	<b>Functions</b>
<b>Jim Iwamiya</b>	Jim.Iwamiya@edd.ca.gov 916-654-9279	<b>Technical Assistance (VP Policy and Procedures)</b>
<b>Jaime Briseño</b>	Jaime.Briseno@edd.ca.gov 916-654-7811	<b>Annual Report of Self-Insured VP Transactions, DE 2568V</b>
<b>Myisha Robertson</b>	Myisha.Robertson@edd.ca.gov 916-653-7417	<b>VP Audits</b>
<b>Elena Torres</b>	Elena.Torres@edd.ca.gov 916-654-8393	<b>Withdrawn/Terminated Plans</b>
<b>Caroline Owoyele</b>	Caroline.Owoyele@edd.ca.gov 916-657-5081	<b>New Plan Approvals</b>
<b>Emmanuel Okoronkwo</b>	Emmanuel Okoronkwo@edd.ca.gov 916-654-8789	<b>New Plan Approvals</b>
<b>Sharisse Kemp</b>	Sharisse.Kemp@edd.ca.gov 916-654-6777	<b>Security Deposits</b>
<b>Steve Hung</b>	Steve.Hung@edd.ca.gov 916-657-5083	<b>SDI Online Technical Support</b>
<b>Glenn Lomax</b>	Glenn.Lomax@edd.ca.gov 916-653-2883	<b>General Release Letter and VP Administration Forms</b>

- **Written inquiries regarding voluntary plans may be addressed to:**

EDD, Disability Insurance Branch  
Voluntary Plan Group, MIC 29VP  
P.O. Box 826880  
Sacramento, CA 94280-0001

**Voluntary Plan 2013 Security Review***(Please do not alter or reformat this worksheet!)*

Employer Name \_\_\_\_\_ VP # \_\_\_\_ - \_\_\_\_\_

California Employer Account Number \_\_\_\_\_

Name of Third Party Administrator, if any \_\_\_\_\_

**2012 Quarterly Taxable Wages**(from Line D1 on your Quarterly  
Contribution Return Form DE 3D)1<sup>st</sup> Quarter \$ \_\_\_\_\_2<sup>nd</sup> Quarter \$ \_\_\_\_\_3<sup>rd</sup> Quarter \$ \_\_\_\_\_4<sup>th</sup> Quarter \$ \_\_\_\_\_**2012 Total** \$ \_\_\_\_\_**Total Estimated 2013 Taxable Wages\***      **2013 Total** \$ \_\_\_\_\_

\* Reminder: The maximum taxable wage ceiling will be \$100,880 for 2013

**Security Required to Continue VP****Total Estimated 2013 Taxable Wages** \$ \_\_\_\_\_ x .5 x .010 = \$ \_\_\_\_\_  
(From line above) (Rounded up to next even \$100)**Current Security Deposit** \$ \_\_\_\_\_**Adjustment (Increase/Decrease)** +/- \$ \_\_\_\_\_**Return this form whether or not you need to increase your security deposit.** Submit this worksheet and your security increase documents by February 15, 2013, to one of the following addresses, depending on mail or in-person delivery:**Mailing Address:**EDD, Disability Insurance Branch  
Voluntary Plan Group  
Attention: Security Analyst  
P.O. Box 826880, MIC 29VP  
Sacramento, CA 94280-0001**In-Person Delivery Address:**EDD, Disability Insurance Branch  
Voluntary Plan Group  
Attention: Security Analyst  
800 Capitol Mall, Room 3137, MIC 29VP  
Sacramento, CA 95814

Check the box below that applies:

- Security adjustment is attached.
- Security adjustment will be forwarded to the EDD under separate cover.
- Request to submit cash.
- Request to submit bearer bond.
- No adjustment to the current security amount is needed.

Name \_\_\_\_\_ Date \_\_\_\_\_  
(Print or type your name)

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

Please direct questions about this form to the VPG at 916-653-6839.



## Voluntary Plan Administrative Changes

Please provide company contact information and if necessary, on a separate form provide TPA contact information. Associated companies may report identical information on one form.

➤ Complete and return the form by February 15, 2013, to:

EDD, Disability Insurance Branch  
Voluntary Plan Group, MIC 29VP  
P.O. Box 826880  
Sacramento, CA 94280-0001

Employer Name \_\_\_\_\_ VP # \_\_\_\_-\_\_\_\_\_

Employer doing business as (dba) or Alias Name \_\_\_\_\_

California Employer Account Number \_\_\_\_\_

**Main Contact Person, (usually the benefits manager, human resources manager, or personnel manager) regarding VP issues (VP administration, securities, claims, etc.):**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail Address \_\_\_\_\_

**Second Contact Person, regarding VP issues (VP administration, securities, etc.):**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail Address \_\_\_\_\_

**Contact Person for questions regarding Annual Report of Self-Insured Voluntary Plan Transactions, Form DE 2568V:**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail Address \_\_\_\_\_

**Disputed Coverage Referrals Contact Person (claims received by the EDD that may be VP liability) should be addressed as follows:**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail Address \_\_\_\_\_

Form Completed by: Name \_\_\_\_\_ Date \_\_\_\_\_

E-mail Address \_\_\_\_\_ Phone \_\_\_\_\_

## **SDI Online Procedures for Voluntary Plans**

### **A. How VP Employers and TPAs obtain user names and temporary passwords**

VP employers and/or authorized third party administrators (TPA) must first complete the “EDD SDI Online Username Tracking Matrix” before registering in SDI Online.

To obtain a copy of the “EDD SDI Online Username Tracking Matrix”, VP employers and/or authorized TPA can request a copy from the Voluntary Plan Group (VPG) or go to the VP Forms and Publications webpage.

- 1) To obtain a copy by phone from the VPG, call 916-653-6839 to have a copy sent via e-mail, U.S. mail, or fax.
- 2) To obtain a copy from the VP Forms and Publications Web page:
  - a. Go to: [http://www.edd.ca.gov/Disability/VP\\_Forms\\_and\\_Publications.htm](http://www.edd.ca.gov/Disability/VP_Forms_and_Publications.htm)
  - b. Select “General Release Letter for State Disability Insurance (SDI) Online”.
  - c. Scroll down to the “EDD SDI Online Username Tracking Matrix” that is attached to the last page of the letter.

Completed copies of the “EDD SDI Online Username Tracking Matrix” can be sent to the EDD by e-mail, U.S. mail, or fax.

- d. If sending by e-mail, send your completed “EDD SDI Online Username Tracking Matrix” to [VPSDIOOnlineRegistration@edd.ca.gov](mailto:VPSDIOOnlineRegistration@edd.ca.gov)
- e. If sending by U.S. Mail, send your completed “EDD SDI Online Username Tracking Matrix” to:

EDD, Disability Insurance Branch  
Voluntary Plan Group  
PO Box 826880, MIC 29VP  
Sacramento, CA 94280

- f. If sending by fax, send your completed “EDD SDI Online Username Tracking Matrix” to: 916-653-6209.

The definitions below are provided to assist with completing the “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 corporate officer

**VP Employer:** Company name

**VP Account Number:** Employer's six-digit Voluntary Plan number

**Employer Account Number:** California employer's account number

- Once the username is approved, you will be notified and provided with a temporary password.

#### **B. How VP Employers and TPAs create a user account in SDI Online**

- 1) Go to the Employment Development Department website at [www.edd.ca.gov](http://www.edd.ca.gov).
- 2) Select the "Disability" link, which will navigate to the Overview-State Disability Insurance page.
- 3) Select the "SDI Online Login" link.
- 4) Enter your username and select "Submit".
- 5) Read the Voluntary Plan: Terms and Conditions.
- 6) Select "I Agree" or "I Do Not Agree".
- 7) Selecting "I Do Not Agree" will prevent an account from being established.
- 8) Selecting "I Agree" will allow you to proceed with establishing an account.
- 9) Complete the account information on the "Voluntary Plan: Setup Security Profile Information" page and select "Next".

**NOTE:** In the current password field, please enter the temporary password that you were given. Create and enter the new password in the new password field.

- Complete the information on the Voluntary Plan Personal Profile Information page and select "Submit".

Once the user account has been successfully created, you will receive a notification message indicating successful account creation. Please keep a copy of the notification of successful account creation for your own record.

**C. How VP Employers and TPAs submit a DE 2523 or DE 2523F in SDI Online**

- 1) Go to [www.edd.ca.gov](http://www.edd.ca.gov).
- 2) Select the “Disability” tab at the top of the page.
- 3) Login to SDI Online (username and password).
- 4) On the Voluntary Plan Forms and Publications page, select the “Report of Voluntary Plan Claim-SDI DE 2523” or “Report of Voluntary Plan Claim-PFL DE 2523F” link.
- 5) Complete the required fields on the Voluntary Plan Options page and select “Next” button.
- 6) On the “Submit Claim Information and Final Report” page, enter the rest of the information from the DE2523 or DE 2523F and select “Submit”.
- 7) Once you select “Submit,” you will receive a confirmation page in SDI Online, which displays the claim ID and receipt number. Please record both numbers, as you will need them later to access and view SDI Online and related award information.

**D. How VP Employers and TPAs submit a DE 2523 or DE 2523F Final Report in SDI Online**

- 1) Go to [www.edd.ca.gov](http://www.edd.ca.gov).
- 2) Select the “Disability” link at the top of the page
- 3) Login to SDI Online (username and password)
- 4) On the Voluntary Plan home page, in the Claim Search section, choose “Claim ID” from the Search By dropdown list.
- 5) Enter the claim ID number.
- 6) Enter the claimant’s last name in the “Claimant Last Name” field and select “Search”.
- 7) Select the appropriate claim by selecting the “Claim ID” link.
- 8) In the Forms Available To Submit section, select the “Submit final report” link.
- 9) Enter the closeout information in the “Final Report Information” section and select the “Submit” button.
- 10) Once you select “Submit”, you will receive a confirmation page in SDI Online, which displays the claim ID and receipt number. Please record both numbers for future reference.

**E. How VP Employers and TPAs respond to a Disputed Coverage referral (DE 5022) in SDI Online**

- 1) Go to [www.edd.ca.gov](http://www.edd.ca.gov).
- 2) Select the “Disability” tab at the top of the page.

### Attachment 3

- 3) Log in to SDI Online (username and password).
- 4) On the Voluntary Plan Home page under the Message Center, select the link “Items Requiring Attention and Notices”.
- 5) Select the “Subject” link in the Inbox screen to access the DE 5022.
- 6) Complete the required fields on the VP/TPA responds online to a DE 5022 and select the “Submit” button.
- 7) Once you select “Submit”, you will receive a confirmation page in SDI Online, which displays the Receipt number. Please record the receipt number for future reference.