

State Controller's Office

State Disability Insurance and

Nonindustrial Disability Insurance Toolkit

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The Purpose:

To identify common errors made when certifying State Disability Insurance (SDI) and Nonindustrial Disability Insurance (NDI) form STD. 674D and reduce the number of documents returned to agencies for correction. Create additional resources to aid in preventing future errors from occurring and provide clarification on existing tools available.

The Approach:

Using the SCO PR250 Tracker history reports, the most frequent errors were identified. Detailed examples and expanded instruction were compiled creating a toolkit to aid in accurate completion of documents.

The Goal:

To reduce the number of documents returned to agencies due to inaccurate or incomplete information on the form STD. 674D, create additional resources to aid in preventing future errors from occurring, provide clarification on existing tools available and increase service levels by processing forms that are correct on original submission.

What is a Green Cycle Document?

A STD. 674 and/or STD. 674D requesting **time** (days and/or hours) be issued in the current pay period during days indicated as "Green Cycle" on the <u>Decentralized Calendar</u>. If an employee has already received all possible time, 21 or 22 days, it is not a Green Cycle Document.

Example of Green Cycle Documents include:

• Time is owed in the current pay period within designated Green Cycle days.

Examples of non-Green Cycle Documents include:

- IDL 2/3 being transferred to IDL Full or EIDL with no additional **time** being owed.
- IDL or NDI being transferred to Regular with no additional **time** being owed.
- Regular time being transferred to IDL or NDI after a full warrant has issued.
- Request for salary adjustment with no additional **time** being owed.
- Request of time for any month other than the current pay period.

If a warrant is returned, do not submit a document requesting time be issued until the redeposit appears in pay history. Until this time, it is a transfer of funds which is a Special.

Document Type Definitions

<u>Green Cycle</u>: Document requesting **time** be issued for the current pay period within designated Green Cycle days.

<u>Regular</u>: Document requesting **time** be issued within the previous 12 months which is not current pay during a designated Green Cycle.

Special: Document requesting a transfer of funds or salary adjustment within the previous 12 months.

<u>Complex</u>: Any document requesting time be issued, transfer of funds or salary adjustment for a pay period older than 13 months.

The document type is determined by the date received and does not change once batched. Inventory is processed by document type and receipt date.

- Example: a document for the 12/2022 pay period requesting a transfer of funds uploaded 10/16/2023 would be batched as and remain a Special while in inventory. It does **not** change to Complex even after the pay period becomes older than 13 months. Do not upload inquiries for previously submitted documents as these will be deemed invalid and duplicate. Once the <u>Weekly</u> <u>Processing Date</u> reflected is more than 10 days past the original upload for the document type, submit the original ConnectHR file upload confirmation using the <u>Escalation Email Instructions</u>.
- For PR250 corrections mark "Amended" at the top of the document and include a copy of the PR250 notice email when uploading to ConnectHR.

SDI Error Messages

SDI Time is Incorrect

The most common SDI ding notice sent is "SDI regular time is incorrect". If an employee is entitled, regular time must be certified in Item 10 on the STD. 674D.

Use the <u>SDI Supplementation Calculator</u> to verify SDI supplementation time allowed.

	SD	I Supplementat	ion Calcula	tor					
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Pay Period:	November	2023				1	2	3	4
ray renou.	November	7777	5	6	7	8	9	10	11
					SDI	SDI	SDI	SDI	SDI
SDI dates:	11/7/2023 to	11/30/2023	12	13	14	15	16	17	18
	m/d/yyyy	m/d/yyyy	SDI	SDI	SDI	SDI	SDI	SDI	SDI
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weekly sol benefit.		\$ 775.00	26	27	28	29	30	301	301
			SDI	SDI	SDI	SDI	SDI		
Monthly based on salary for Supplementation	on Pay:	\$ 4,500.00							
Timebase:		Fulltime							
□Working while on SDI			Possib	le supp	lement	ation:	40	hours	
Monthly based on salary f	or Regular Pay:			=	5	days	0	hours	
Total time worked DURING the SDI period:	days	hours		Note: M	ax supp	ementa	tion is 4	0 hours	
	Res	et							

Incorrect STD. 674D that shows 4 days of regular pay in Item 9 however not certified in Item 10:

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Personnel@agency.ca.gov																					Pers	onr	nel	@ag	gen	cy.c	a.g	ov						

Corrected STD. 674D which includes the 4 days of regular pay due in Item 10:

STATE OF CALFORNIA - CONTROLLER'S OFFICE DOCUMENT NUMBER OF INDUSTRIAL/STATE DISABILITY PAY/ADJUSTMENT REQUEST STD. 6740 (REV. 32022) Amended	SERIAL 001 F=NDI-FCL] 30 31											
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R01 123-45-6789 A B SAMPLE 2. s. PAY PERIOD 6. ENTER NUMBER OF HOURS AND CODE - Intervening activity/working while on Disability [W=Worked or leave used; C=Industrial Disability (DL); L=Dock during the regular period of pay; I Please complete If employee is on alternate work schedule before, during, and after Disability Vertical during the regular period of pay; I	F=NDI-FCL]											
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b. ■ EMPLOYEE ENTITLED TO ENHANCED IDL 12 01 23 0 4 1234567												
c. AVERAGE HOURS COMPUTED FOR INTERNITY OF												
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b. ■ EMPLOYEE ELECTED SUPPLEMENTATION SHIFT CODE HOURS SHIFT RATE Personnel Specialist												
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c. SDI WEEKLY RATE: § 775,00 DLFULL 6 916-555-1234												
DL 2/3 N												
15. EMAIL ADORESS	13. Email Audress Personnel@agency ca dov											
Personnei@agency.ca.gov												

Note:

Supplementation time allowed varies based on an employee's election to supplement, salary, and SDI weekly rate. Maximum supplementation cannot exceed 40 hours (5 days). It is <u>required</u> to verify the SDI weekly rate awarded to the employee and include this value in Item 8B. Always use the SDI Supplementation Calculator to verify supplementation eligibility as it is possible for an employee to be ineligible due to their SDI Weekly Rate. For example, ineligibility may occur when an employee consistently works overtime since those values are used when EDD determines the SDI Weekly Rate.

NDI Error Messages

NDI Supplementation Time is Incorrect and Supplementation Time is Incorrect

The most common NDI PR250 notices sent are "NDI time is incorrect" and "Supplementation time is incorrect". The primary root causes of the errors are incorrect dates for NDI days, and salary rate for NDI. By using the Enhanced NDI Calculator found on the SCO website and verifying entries, the frequency of these errors can be greatly reduced.

When opening the <u>Enhanced NDI Calculator</u> there are several worksheets at the bottom of the workbook. Use the "ENTER" worksheet to enter data which calculates and will autofill the 674D worksheet.



Following the instructions circled below, complete the calendar section of the ENTER worksheet. Indicate time worked, dock and approved NDI days. Holidays, if any in the pay period, are highlighted in purple. Refer to <u>PPM Section E 106</u> Holiday on NDI for more information on holiday pay eligibility.

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Complete all peach-colored fields of this worksheet and verify accuracy for the specified pay period. Fields in grey are locked and linked to the information entered within the calendar section.

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Several of the fields have additional instructions available and can be viewed by clicking the cell.

<u>Note</u>:

The "Monthly Salary Rate for NDI (not actual)" field must contain the salary as of the beginning of the NDI approval period <u>not</u> the current salary. An incorrect salary will result in miscalculation of NDI benefits and supplementation.

Please refer to <u>PPM Section E 103</u> which states in part, "NDI benefits are computed based on the employee's salary rate at the inception of the benefit and are NOT modified by any subsequent salary increases or decreases".

After the fields have been completed, click the "Go to 674D" button at the bottom of the worksheet. This will take you to the auto filled 674D.

STATE OF CALIFORNIA INDUSTRIAL/NON- STD. 674D (REV. 3/2022)	ITATE OF CALIFORNIA - CONTROLLER'S OFFICE NOUSTRIAL/NON-INDUSTRIAL DISABILITY/STATE DISABILITY PAY/ADJUSTEMENT REQUEST STD. 674D (FEV. 3/2022) Amended Inquiry Separated TO _STATE CONTROL LDDOED LIDEADE UDV UNIT																		ſ	DOCUM	ENT NUMBER	80F				
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Item 9 and Item 12 are required to be completed prior to submission. These are fillable fields and can be completed by clicking into the appropriate cell. For Item 9, if no pay appears in pay history, enter "None".

Frequently Asked Questions

Q. Can I save calculators to my desktop?

A. Online calculators are constantly having internal tables updated in the background to include the most up to date information. Once a calculator is saved to your computer it prevents these updates from being received which is why it is strongly recommended to always use calculators found directly on the SCO website.

Q. Since you can see pay history, why do I have to complete Item 9 on the STD. 674D?

A. Completion of Item 9 is required to efficiently identify document type and prevent delays of documents being batched for processing. Documents with an incomplete Item 9 must have further review to identify document type. To ensure accurate and timely batching, complete Item 9 with pay information or if there is currently no pay write "none".

Q. How are health, dental or vision benefits continued without supplementation?

A. Health, dental and vision benefits may be continued up to 26 weeks while an eligible employee is receiving SDI benefits per <u>PPM Section E 806</u> either by using leave and/or establishment of account receivables for the employee's premium portion. This part of the PPM also provides another reference to <u>PPM Section H827</u> that lists detailed instructions for completing the STD. 674. When requesting to establish a continuation of benefits accounts receivable, the STD. 674 must be routed to the Benefit's Unit per step 2 of the previously mentioned instruction.

Q. Why is verification of the SDI weekly benefit required prior to issuing supplementation?

A. Per the <u>Integration of Wages with Benefits FAQ</u>, which is found on the EDD website, "Wages received during this time, plus DI or PFL benefits, cannot be more than the employee's normal weekly salary (excluding overtime pay) before the start of the disability or family leave period." This is in line with <u>California Unemployment Insurance</u> <u>Code Section 2656</u>. *If Supplementation is issued without verification it could result in an overpayment to the employee.

Q. Where can I find additional references for NDI and NDI-FCL?

A. Below are several additional references for NDI and NDI-FCL.

NONINDUSTRIAL DISABILITY INSURANCE (NDI) - REFERENCES

NDI Module 1 Handout

EDD - Nonindustrial Disability Insurance

CalHR NON-INDUSTRIAL DISABILITY INSURANCE - FAMILY CARE LEAVE FAQ

CalHR NDI-FCL Calculator Samples