

HUMAN RESOURCES MEMORANDUM 08-007A		DATE ISSUED: 4/5/2008
SUBJECT: State Disability Insurance and Paid Family Leave Information and Requirements		REFERENCE: None
TO: MANAGERS, SUPERVISORS, PERSONNEL LIAISONS, Attendance Clerks		SUPERCEDES: None

PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES

Purpose

The purpose of this Human Resources (HR) Memorandum is to notify employees, supervisors and attendance clerks of their responsibilities regarding State Disability Insurance (SDI) and Paid Family Leave (PFL).

NOTE: Please ensure a copy of this HR Memorandum is distributed to all managers and supervisors in your office.

HR Memo 06-028

This memorandum provides detailed information outlining the SDI and PFL programs and requirement criteria.

Employee and Supervisor Checklists

The Employee and Supervisor Checklists outline responsibilities if/when an employee elects SDI and/or PFL. See the following checklists:

- Employee Responsibility Checklist
- Supervisor Checklist
- State Disability Insurance (SDI) and Paid Family Leave (PFL) Employee Options Checklist (Options Checklist)

Responsibilities

The following table provides the individual tasks and who is responsible for completion of each task:

Step	Action	Responsibility
1	Notify supervisor immediately if he/she plans to apply for SDI/PFL	Employee
2	Request Family Medical Leave Act (FMLA) eligibility report from personnel specialist	Attendance Clerk
3	Print and give the employee the following documents: <ul style="list-style-type: none"> • Family Medical Leave Act papers • Employee Responsibilities checklist • State Disability Insurance (SDI) & Paid Family Leave Program (PFL) Employee Options Checklist • Formal Leave of Absence request form GS 28 	Attendance Clerk

Step	Action	Responsibility
	Links for all documents are located on the Supervisor's checklist at the following link in the OHR website at: Supervisor's Checklist	
4	Print the State Disability Insurance (SDI) Paid Family Leave (PFL) Checklist for Attendance Clerks and Supervisor and check off each task as it is completed.	Supervisor or Attendance Clerk
5	Read and complete FMLA papers and send them to his/her Supervisor or Attendance Clerk.	Employee
6	Read the Employee Responsibilities Checklist and complete the following documents: <ul style="list-style-type: none"> • FMLA papers and formal leave of absence request to immediate Supervisor or Attendance Clerk. • State Disability Insurance (SDI) & Paid Family Leave (PFL) Options Checklist • Formal Leave of Absence request • Mail all documents to immediate supervisor within three days of receipt of forms. 	Employee

Required Documentation

The employee is required to submit the following documents within three days of the date received:

- FMLA package
- [State Disability Insurance \(SDI\) & Paid Family Leave \(PFL\) Employee Options Checklist \(DGS OHR 100\)](http://www.documents.dgs.ca.gov/dgs/fmc/dgs/ohr100.pdf)
- [Formal Leave of Absence Request Form \(DGS OHR 28\)](http://www.documents.dgs.ca.gov/dgs/fmc/dgs/ohr028.pdf)

The following documents are provided by EDD, and the employee is required to submit copies of these documents to his/her supervisor:

- SDI Notice of Computation (provides potential award information)
- Notice of Determination providing eligibility information
- Copies of their SDI/PFL pay stubs

Continuation of Health Dental and Vision Benefits

Per PML 2006-042 an employee is eligible to continue his/her health, dental, and vision coverage while out on approved SDI/PFL leave.

The employee will continue to be responsible for his/her portion of the benefits premiums.

An A/R will be established for employee's portion of the benefits premium and the employee will be required to pay the A/R for the continuation of his/her benefits.

All A/Rs will be cleared with the supplemental pay or upon the employee's return to work.

Lapse in Benefit Coverage

The State Disability Insurance (SDI) & Paid Family Leave (PFL) Employee Options Checklist provides the Disability Transaction Unit (DTU) with the employee's election to continue or discontinue health, dental, and vision benefits.

If the Checklist is not received, by the DTU, the benefits will automatically be discontinued until the Employee Options Checklist is received.

Supplemental Pay Delay

Per PML 2006-042, the state departments are required to have received copies of an employee's SDI/PFL pay stubs prior to requesting leave supplementation pay.

Supplementation of leave credits is designed to assist employees in paying their portion of benefit premiums.

Important: If the DTU does not receive the employee's pay stubs timely, supplementation pay will be stopped, and an A/R will be established for the employee's portion of his/her health, dental, and vision benefits.

Note: Supplementation pay is subject to mandatory deductions.

Confirmation Letter

When the DTU receives the FMLA package, Employees Options Checklist, and Formal Leave of Absence Request form; the DTU will provide a confirmation letter to the employee confirming the options selected.

Note: If the employee disagrees with any information in the confirmation letter, or would like to request a change, he/she shall contact the DTU immediately.

Overpayment Occurs

The employee is required to notify EDD of all wages earned, as it may impact their SDI payments.

When an employee is overpaid while on SDI/PFL, EDD will establish the A/R and recover the overpayment.

Contact

For questions regarding this memorandum, please contact the DTU specialist at 376-5457.

/s/

MARIA J. LOPEZ, Manager
Personnel Operations Section

kts