

Committed to Providing Exceptional Customer Service

# **OSIP Online Services Guide**

Actuaries

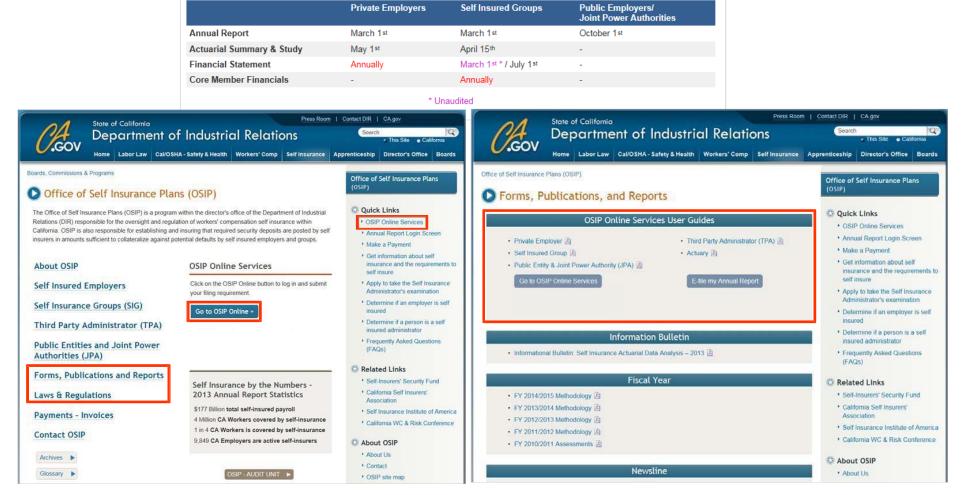
#### What is OSIP Online Services?

OSIP Online Services is where you can electronically submit a growing list of information to the Office of Self Insurance Plans (OSIP). Login to file or amend Actuarial Summaries and Studies, update your profile, or de-select former clients.

Annual Due Dates

Please email OSIP@dir.ca.gov or call (916) 464-7000 if you wish to register with OSIP, or have any questions. Please see the

regulations regarding self insurance plans and our Forms, Publications, and Reports page for updated user guides.



OSIP Online - Actuary User Guide

### Registering with OSIP

Email OSIP@dir.ca.gov for a link to the New Actuary Registration form. The following requirements must be certified as true and correct in order to register:

- 1. The actuary/firm maintains a minimum \$1,000,000 professional liability and errors and omissions coverage. §15209(a)(3).
- 2. I am independent with no common ownership or financial interest in the entity that is the subject of the actuarial study and summary.
- 3. I possess current experience making California workers' compensation actuarial projections.
- 4.I possess the professional designation of Fellow of the Casualty Actuarial Society (FCAS), or a member of the American Academy of Actuaries (MAAA), or a member of the Society of Actuaries (MSOA) who is qualified to sign a statement of actuarial opinion on loss reserves.

Designations listed in the drop-down menu are the minimum registration requirements as set forth in the California Code of Regulations.

After you submit your completed registration form, you will receive a registration confirmation email with your User ID and Password to access OSIP Online.



#### Main Menu

You may only submit an Actuarial Summary and Study after you receive an email notification that your client has selected you as their actuary. Click **Actuarial Summary & Study** to file or amend and note that information cannot be saved and continued at a later time.

Actuarial Summary and Study due dates:

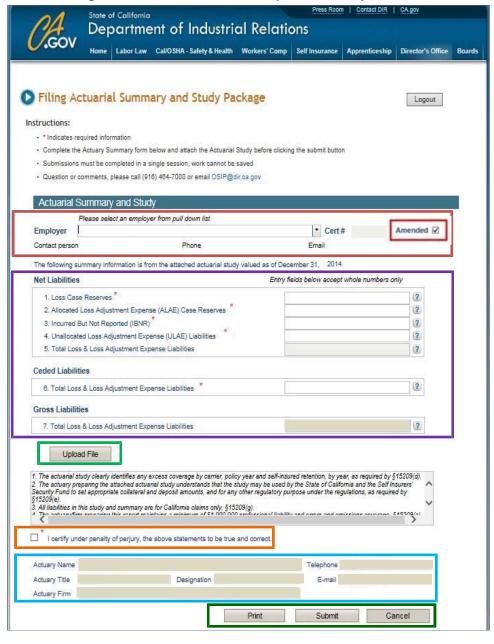
Self insurance groups - April 15<sup>th</sup> Private employers - May 1<sup>st</sup>

Choose **Update My Profile** to change any information entered at registration or to change your password.

Choose **De-Select Employer** if you no longer wish to offer a client your services or wish to keep your list of clients up to date. It is not necessary to de-select a client in order for them to select a new actuary.



## Submitting the Actuarial Summary and Study



Information entered on this summary page **cannot** be saved and continuedlater.

 Select your client from the **Employer** pull down menu. Their certificate number, contact person, phone number, and email address will display. Your client will not be listed if they have not logged in to select your services. Once you are selected you will receive an email confirmation.

Check off **Amend** if this is an amendment. Contact OSIP if you need to amend after the due date.

- Complete the Net Liabilities and Ceded Liabilities sections, the Gross Liabilities will automatically tally. Hover over for definitions.
- 3) Attach a PDF of your study by clicking **Upload File**. Please email the study to OSIP@dir.ca.gov if your file is larger than 12MB.
- 4) Read the certification statements and check the "I certify under penalty of perjury, the above statements to be true and correct" confirmation box to proceed.
- 5) Confirm your pre-populated profile information is accurate. Return to the main menu to update your profile by clicking Cancel. The information entered on the summary form will not besaved.
- **6) Print** will print the form but not the attachment.

**Submit** will file the completed form and attachment with OSIP. A confirmation screen will appear. You and Security Fund will receive a confirmation email with a copy of the completed summary and study. Your client will also receive a confirmation email, but without the summary and study.

**Cancel** will bring you back to the Main Menu, your work will not be saved.

#### **De-Select a Former Client**

Choose **De-Select Employer** if you no longer wish to offer a client your services or wish to keep your list of clients up to date. It is not necessary to deselect a client in order for them to select a new actuary.

- 1. From the Main Menu select **De-Select Employer**.
- 2. Select your former client from the drop-down menu.
- 3. Verify that the correct contact information populates, then **Print** a copy for your records.
- 4. Click Submit. Both you and your former client will receive a confirmation email



## **Update Your Profile**

The most current information on file will be shown. Update any information that needs to be changed and click **Submit**. You will see a confirmation screen and receive a confirmation email.

You can also change your log in information and password after you have registered.

Updates to your profile are not sent to your clients.

