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OSIP Online Services 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). Log in to file Actuarial Summaries and Studies for your clients and update your profile. Soon you will be able to de-select former clients.

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

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

1. You will receive a registration confirmation email with your User ID and Password to access OSIP Online.
2. Your name is placed on a list available to self insured employers to select your services.

![New Actuary Registration Form](image-url)
Log-In to OSIP Online

Log-in, find links to regulations, FAQs, and user guides at https://efiling.dir.ca.gov/OSIPO/.

Please email OSIP@dir.ca.gov if you forgot your User ID or Password.

Internet Explorer (8 or higher), Chrome, Firefox, and Safari allow full functionality of 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 and note that information cannot be saved and continued at a later time.

Actuarial Summary and Study due dates:
- Self insurance groups - April 15th
- Private employers - May 1st

Choose Update My Profile to change any information entered at registration.

The De-Select Employer feature will be available soon. It is not necessary to de-select a client in order for them to select a new actuary, but you may do so by emailing OSIP@dir.ca.gov.
Submitting the Actuarial Summary and Study

1) 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.

2) 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 be saved.

6) Print, Submit, and Cancel buttons:

Print will print the form but not the attachment.

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

Tips:

- Information entered on the summary page cannot be saved and continued later.
- Email OSIP@dir.ca.gov to amend a filed Actuarial Summary and Study. We will provide a summary form and instructions.
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.

Updates to your profile are not sent to your clients.