Employer Portal User Guide

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Introduction

This chapter covers basic information about SF City Option and how you can use the Employer Portal web application to participate in the program.

About San Francisco City Option and the Employer Portal

San Francisco employers can choose the SF City Option to meet the employer spending requirement (ESR) of the San Francisco Health Care Security Ordinance (HCSO). When you make contributions through the SF City Option Program, your employees are eligible for either access to health care services through Healthy San Francisco or one of two Medical Reimbursement Accounts (SF MRA or SF Covered MRA) to pay for health care expenses. For more information about SF City Option, visit www.sfcityoption.org.

The Employer Portal is the online web application for employers to make contributions on behalf of employees and load employee information and rosters. This User Guide provides step-by-step instructions on how to use the Employer Portal to comply with the HCSO and ensure that your employees can connect with their benefits.

We hope this User Guide is comprehensive and helpful. However, please contact us if you have any further questions about SF City Option or need assistance with the Employer Portal. You can reach SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.

If you have questions about the Health Care Security Ordinance, including the Annual Reporting Form, please contact the San Francisco Office of Labor Standards Enforcement at 1(415) 554-7892 or HCSO@sfgov.org, or visit their website at https://sfgov.org/olse/health-care-security-ordinance-hcso.
Accessing Your Employer Portal Account

This chapter outlines how to register and access your account, including requesting assistance if you have difficulty signing in to your account.

Registering a New Employer Account

If your company is new to SF City Option, go to the Employer Portal home page at https://employerportal.healthysanfrancisco.org and select the ‘Create Account’ menu option.

If your company already created an account in the Employer Portal but you are not a registered user and are unable to access the account, contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.
You will be prompted to enter information about yourself and the company, as well as to agree to the SF City Option Program Terms and Conditions.

Passwords must be at least 8 characters and include a combination of:
- Upper case letters (A-Z)
- Lower case letters (a-z)
- Numbers (0-9), and
- Non-alphanumeric characters (for example, !?#@&)

Check Your Email. After you have successfully created an employer account, you will receive two emails: (1) a new employer account confirmation email and (2) an email containing your user account login information.

If you are attempting to create a new employer account and receive a message that an account already exists, please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.
Signing in to Your Account

Once your account has been created, return to the Employer Portal home page at https://employerportal.healthysanfrancisco.org and enter your user name and password to sign in to your account.

Password Requirements

Account passwords expire every 90 days. The Employer Portal will prompt you to create a new password each time your password expires.

Passwords must be at least 8 characters and include a combination of:
- upper case letters (A-Z)
- lower case letters (a-z)
- numbers (0-9)
- non-alphanumeric characters (for example, !?#@&)
Forgot Your User Name or Password?

If you forgot your user name or password, select the ‘Forgot your user name or password?’ link on the Employer Portal home page.

- If you forgot your user name, enter the email address associated with your user account and click ‘Send My Username.’
  
  **Check Your Email.** If the email address you provided is in our system, an email with your username will be sent to the email address.

- If you forgot your password, enter the user name associated with your user account and click ‘Send My Password.’
  
  **Check Your Email.** If the user name you provided is in our system, an email with a temporary password will be sent to the email address associated with the user name. Once you have logged in with your user name and the temporary password, select the ‘Manage Account’ menu option on the left side of the webpage, click on the ‘Manage Users’ tab, and edit your account with a new password.

After five consecutive failed attempts to log in to your account, you will be locked out of our system. Please contact SF City Option at **(415) 615-4492** or **employerservices@sfcityoption.org** to have your password reset and be assigned a temporary password.

To change your temporary password after you log in to your account: select the ‘Manage Account’ menu option, click on the ‘Manage Users’ tab (if you are a primary user), and edit your account with a new password. Passwords expire after 90 days for security reasons and must meet the password complexity requirements noted in the Password Requirements section of this User Guide.
Changing Your Password

To change your password, click on the ‘Manage Account’ menu option.

- If you are a secondary user, you will see your user information.
- If you are a primary user, click on the ‘Manage Users’ tab and the ‘Edit’ hyperlink corresponding to your account to see your user information.

1. Click on the ‘Change Password’ button.

2. Type User Name, current password, and new password. Click on the ‘Save’ button.
Managing Rosters

This chapter discusses how to upload, enter and manage employee rosters using the Employer Portal.

Employers participating in SF City Option submit employee rosters through the Employer Portal to identify the employees who will receive an SF City Option health care benefit. Because we use the employee information you provide us to contact your employees and make benefits available to them, it is critical that you submit accurate and up-to-date employee information.

Employee Information for Rosters

The following table specifies the employee information you will be asked to provide for the employee roster and the rules corresponding to each data field.

<table>
<thead>
<tr>
<th>Employee Information</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>Required. This must be 9 digits without dashes. Do not provide an invalid SSN (e.g. 999999999).</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Required. This must be in MM/DD/YYYY format.</td>
</tr>
<tr>
<td>First Name</td>
<td>Required. Do not use special characters such as dashes or apostrophes in the First Name.</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>Optional.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Required. Do not use special characters such as dashes or apostrophes in the Last Name.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Required. This must be your employee’s personal address. Do not provide a company mailing address. We use the addresses you provide to communicate with your employees by mail about their health care benefits.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Optional.</td>
</tr>
<tr>
<td>City</td>
<td>Required. Verify that the city is spelled correctly. The city must be located within the zip code provided for the record or an error will appear.</td>
</tr>
<tr>
<td>State</td>
<td>Required. This must be the two letter state abbreviation.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Required. This must be 5 digits only.</td>
</tr>
<tr>
<td>Primary Phone</td>
<td>Required. This must be 10 digits without dashes or parentheses. Do not...</td>
</tr>
</tbody>
</table>
| **Does this employee have health insurance?** | Required.  
This question asks whether the employee has health insurance from **ANY** source. This could be health insurance provided by your company or another source. Acceptable answers are:  
- Yes  
- No  
- Unknown*  
Health insurance includes:  
- Health insurance provided by an employer (e.g. from your company, from another employer, from the employee’s spouse, or from the employee’s parent)  
- Individual health insurance purchased by the employee or a member of the employee’s family (e.g. through Covered California)  
- Government-funded health insurance (e.g. Medi-Cal)  
**Healthy San Francisco** is not health insurance. If you know that the employee is covered by Healthy San Francisco, the health access program for uninsured San Francisco residents, answer “No” for this question.  
*Use ‘Unknown’ if you do not know whether the employee has health insurance from any source.* |
| **Alternate Phone** | Optional. |
| **Health care contribution amount for this employee** | Required.  
This is the amount you will be paying to SF City Option for employee health care benefits under our program. Do not include employees who you do not want to receive SF City Option program benefits.  
If you intend to comply with the Health Care Security Ordinance (HCSO) for this employee entirely with contributions to our program, the amount is equal to the minimum employer spending requirement under the HCSO. For information about the minimum health care expenditure rate under the HCSO, visit the Office of Labor Standards Enforcement website at [https://sfgov.org/olse/health-care-security-ordinance-hcso](https://sfgov.org/olse/health-care-security-ordinance-hcso). |
Creating a Roster

You must create a new roster EACH TIME you make a payment in SF City Option on behalf of your employees. A roster should contain the information for all employees for whom you are making an SF City Option contribution for that time period. If you have questions about who to include on your roster, review the Health Care Security Ordinance (HCSO) guidance on Covered Employees on the Office of Labor Standards Enforcement website: http://sfgov.org/olse/C-COVERED-EMPLOYEES.

You can create an employee roster by one of two methods:
1. **Upload a roster** with employee information from an Excel spreadsheet saved as a CSV file
2. **Create a roster directly in the Employer Portal** by manually entering employee information

Method One: Uploading a Roster

Employers can upload an employee roster to the Employer Portal from an Excel spreadsheet saved as a CSV file.

To create a new roster:
1. Select the ‘Manage Rosters’ menu option.
2. Click the “Download Roster Template” link. If you are using Internet Explorer, you will be prompted with the dialog box to download or save the file. However, if you use Chrome, the browser may not prompt you and the download might be automatic. Save the roster template at your computer.
3. Add your employees for whom you are making SF City Option contributions to the roster template. After entering two employees, your file should look something like this:
4. Format the CSV file for upload. The Roster Template only has the column header row pre-populated. Necessary custom formatting is still required. Please follow the specified formats in the appendix A.

PLEASE SEE APPENDIX A FOR INSTRUCTIONS ON HOW TO FORMAT THE CSV FILE FOR UPLOAD.

To upload a roster after you have added your employees and formatted the CSV file:

1. Select the ‘Manage Rosters’ menu option.
2. Click on the ‘Browse’ button.
3. Choose the CSV file to upload from your computer and click on the ‘Open’ button.
4. Click on the ‘Import’ button on the Manage Rosters screen.

5. After the file has been imported, you will be able to review the employee information in the Employer Portal and make changes before submitting your roster – go to Errors and Warnings During Roster Review.
Method Two: Creating a Roster Directly in the Employer Portal

You can create a roster directly in the Employer Portal by entering employee information one employee at a time.

To create the roster using this method:
1. Select the ‘Manage Rosters’ menu option.
2. Click on the ‘Create New’ button.

1. Click on the ‘Add Employee’ button.
2. Enter employee information on the Employee Details screen. When you are completed entering information for the employee, click on the ‘Save’ button.

→ Note: Once you enter and save the Employee Details, the first 5 digits of the Social Security Number will appear as asterisks (e.g. ****2345).

3. You will be taken back to the Import Roster screen. If you need to add more employees, repeat Steps 3-4 until you have completed entering information for all employees on your roster.

4. After you have finished adding employees to the roster, click on the ‘Review’ button.

5. You will be able to review the employee information in the Employer Portal and make changes before submitting your roster – go to Errors and Warnings During Roster Review.
Errors and Warnings During Roster Review

The Employer Portal identifies discrepancies in your roster as part of the review process and will prompt you through warning and error messages to correct the discrepancies. When the Employer Portal identifies errors or warnings, a summary will appear in red at the top of the page detailing the number of employees in the roster with errors or warnings.

For more information about the discrepancy, click on the ‘Error’ or ‘Warning’ link to the far right of the employee record. If you need assistance, contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.

Read the next few pages for instructions on how to handle errors and warnings. Repeat editing each employee’s information as necessary to correct the errors and warnings. Once you are completed with making your corrections, click on the ‘Review’ button. Then, go to Submitting a Roster for instructions on how to submit your roster.
Handling Errors

Errors are indicated with an orange bar and require corrections for the employee record to be saved and submitted with the roster. The Employer Portal identifies errors to ensure that you are not submitting typos by mistake. If an error is not corrected, the employee with the error will NOT be included on the roster.

Errors include:

<table>
<thead>
<tr>
<th>Error Type</th>
<th>Error Name</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SSN Invalid</td>
<td>Missing digits or improper format</td>
</tr>
<tr>
<td>2</td>
<td>Phone Number Invalid</td>
<td>Missing digits or improper format</td>
</tr>
<tr>
<td>3</td>
<td>DOB Invalid</td>
<td>Missing digits or improper format</td>
</tr>
<tr>
<td>4</td>
<td>Multiple Employees With The Same SSN</td>
<td>Multiple employees on your roster have the same SSN</td>
</tr>
<tr>
<td>5</td>
<td>Verify Employee SSN</td>
<td>SSN you are attempting to submit in this roster is different from the SSN already in the City Option system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee)</td>
</tr>
<tr>
<td>6</td>
<td>Verify Employee DOB</td>
<td>Date of birth you are attempting to submit in this roster for an employee is different from the date of birth already in the City Option Program system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee)</td>
</tr>
<tr>
<td>7</td>
<td>Verify Employee Last Name</td>
<td>Last name you are attempting to submit in this roster for an employee is different from the last name already in the City Option Program system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee)</td>
</tr>
<tr>
<td>8</td>
<td>Verify Employee First Name</td>
<td>First name you are attempting to submit in this roster for an employee is different from the first name already in the City Option Program system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee)</td>
</tr>
</tbody>
</table>
Error Types 1-3: SSN/Phone Number/DOB Invalid

Upon clicking on the ‘Error’ hyperlink, you will be sent to a page to edit. Make the changes to the employee’s information and click on the ‘Save’ button.

If the error is in the SSN field and you need further assistance, contact SF City Option at 1(415) 615-4492.
Error Type 4: Multiple Employees With The Same SSN

Upon clicking on the ‘Error’ hyperlink, you will be sent to a page to edit.

If you entered the incorrect SSN for an employee, delete the record, click on “Back to Roster,” and then click on “Add Employee” to enter the correct information.

If you wanted to send multiple contributions for the same employee, SF City Option needs them combined into one record: delete all records except for one and then edit the contribution amount to reflect the total.

If you need assistance, contact SF City Option at 1(415) 615-4492.
Error Type 5: Verify Employee SSN

This error occurs when the SSN on the roster does not match the SSN in the SF City Option system. Upon clicking on the ‘Error’ hyperlink, you will be sent to a page to verify the correct SSN for the employee.

If the error is in the first 5 digits of the SSN, contact SF City Option at 1(415) 615-4492 for help in identifying the correct SSN.
Error Types 6-8: Verify Employee DOB/Last Name/First Name

This error occurs when the employee’s date of birth, last name, and/or first name on the roster does not match the date of birth, last name, and/or first name in the SF City Option system. Information in the SF City Option system reflects what your company submitted in a previous roster or what the employee updated since a previous roster. Upon clicking on the ‘Error’ hyperlink, you will be sent to a page to verify the correct information for the employee.

- Click on “Use Information from This Roster” to override the information already in the SF City Option system with the employee information you are attempting to submit in the roster. Select this option if you are certain that the employee information you have in the roster is correct.
- Click on “Use Information from City Option System” to replace the employee information in the roster with the employee information already in the SF City Option system. Select this option if you made a mistake on the roster or if you are uncertain that the employee information you have in the roster is correct.
Handling Warnings

Warnings are indicated with a yellow bar and encourage corrective action or investigation as to the discrepancy. Warnings are generated to prompt you to review whether the information you provide is the most accurate and updated information available for that employee. If a warning is not corrected, the employee with the warning will still have the record saved and submitted with the roster.

Warnings include:

- Notification that the address or phone number you are attempting to submit in the current roster is different from the address or phone number already in the SF City Option system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee).

Upon clicking on the ‘Warning’ link, you will be sent to a page to make edits, if necessary. Make any necessary changes to the employee’s information and click on the ‘Save’ button.

⚠️ Check Your Email. If a warning is not corrected and you proceed to submit the roster, you will receive an email notification regarding the warnings that were detected and not corrected. The email will also contain instructions for correcting the discrepancies if necessary.
Submitting a Roster

Once you have reviewed employee information and addressed any warnings and errors, you can submit your roster. On the Import Roster screen, click on the ‘Confirm and Proceed to the Next Step’ button.

Read the Terms and Conditions on the next screen thoroughly. From this page, you may also click on the ‘Print this Roster’ button to print out the roster for your records.

To submit the roster, you must: (1) check the box next to “I have read and agree to the Terms and Conditions,” and (2) click on the ‘Submit’ button.

Check Your Email. After you have successfully submitted a roster, you will receive an email confirming the submission of your roster and the payment amount owed for that roster.
Making a Payment

Rosters must be paid within 30 days after the end of the quarter to be in compliance with the Health Care Security Ordinance. If payment for past quarters was missed, reach out to the San Francisco Office of Labor Standards Enforcement (OLSE) to get guidance on how to come into compliance; do not use SF City Option for missed quarters as we cannot apply payments retroactively.

Timely payments are important. Submitted rosters are reverted to ‘Editing’ status if a payment is not received within 30 calendar days of roster submission. If your roster is reverted to ‘Editing’ status, you will need to resubmit the roster in order for SF City Option to process your payment.

If you send payment and do not submit a roster within 30 calendar days of our receipt of your check, your check will be returned to you. You will need to submit the roster and resend payment.

➤ Note: If you have questions about Health Care Security Ordinance (HCSO) payment deadlines, contact the San Francisco Office of Labor Standards Enforcement (OLSE) at HCSO@sfgov.org or consult the OLSE website at https://sfgov.org/olse/health-care-security-ordinance-hcso.

There are two ways to make a payment:

1. Making a Payment via Check

Make your check payable to San Francisco City Option. Include the Roster ID Number on the check. **Do not include a printed version of your roster as it contains sensitive employee information like names, addresses and phone numbers.** Mail your check to:

   San Francisco City Option
   PO Box 194367
   San Francisco, CA 94119-4367

   The contribution amount on the check must match the total amount of the employee roster. Do not submit multiple checks for a single roster. Do not submit one check for multiple rosters.

   SF City Option does not provide a street address for overnight delivery. To send payment via a trackable or overnight option that delivers to a PO Box, you can send your check via Certified Mail or Priority Mail Express through the United States Postal Service.

   If you have questions about payments to SF City Option, please contact us at 1(415) 615-4492 or employerservices@sfcityoption.org.
2. Making an Online Payment

After you submit your roster, the Employer Portal will take you to a screen to start the online payment process. Click on the ‘Proceed to Online Payment’ button to start the process.

Note: This is an electronic funds transfer (EFT) payment and not an ACH deposit. We do not accept payment by ACH deposit.

Note: If your bank requires a bank security form, send us the form to complete prior to making your online payment otherwise your payment may be declined. If you are unsure whether your bank needs a bank security form, check with your Finance Department or your bank.

Note: The maximum payment amount for a single online payment is $800,000. If you need to make a payment greater than $800,000, please mail a check. To arrange for the ability to make an online payment greater than $800,000 for a future roster, please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.
If you want to pay online at a later time, click on the ‘Cancel’ button. When you are ready to pay online, select the ‘Manage Rosters’ menu option and click on the ‘Pay Now’ link corresponding to the roster you want to submit payment for.

You will need your company’s bank routing and account number. Select ‘Pay Now’ to be directed to Forte’s Secure Web Pay. Online payment is a free and secure service.

To begin an online payment, review Billing Information and Order/Transaction Information sections.

- Company Name, User first and last name, email, phone number, employer address and Roster ID are pulled from the Employer Portal.
  - To correct any of the company information, return to the Employer Portal account, select ‘Manage Account’.
- Select “Continue” to proceed to the next step.

![SF CityOption Image]

Enter Routing and bank account number into the Electronic Check. Below the Electronic Check, re-enter Account number and select Account Type from the dropdown menu.

![SF CityOption Image]

➔ Note: Payment Amount field is locked and cannot be changed. This field is populated directly from the roster that you submitted.
Once the bank account number is entered, the numbers are masked and appear only as asterisks (i.e. **********). Select ‘Continue’ to go to the next step.

Review the Billing Information, Order/Transaction Information and Payment Information sections.
- Check the box next to “I authorize my account to be charged in accordance to the following Terms and Conditions for the payment(s) indicated above”.
- Select ‘Submit Payment’.

⇒ Note: A pop-up will appear with either a “Transaction Declined” or “Transaction Approved” message.
Upon successful submission of your payment, you will be taken to the ‘Congratulations. Your payment was successfully submitted’ screen in the Employer Portal. If you do not receive the payment confirmation email, contact SF City Option before attempting to make a payment a second time.

⇒ IMPORTANT: To avoid making a duplicate payment, DO NOT use your back button browser AFTER you have clicked on the ‘Submit’ button.

If you have questions about online payments to SF City Option, please contact us at 1(415) 615-4492 or employerservices@sfcityoption.org.

Receiving a Payment Confirmation

☐ Check Your Email (for online payment only). When your payment has been successfully submitted, you will receive a confirmation email with the subject line “Forte Secure Web Pay – Payment Authorization Notification.” If your payment is declined, you will receive an email with the subject line of “Forte Secure Web Pay – Payment Rejection Notification.”

☐ Check Your Email (for both check and online payment). When your payment has cleared, you will receive an email notification. For online payments, you will receive this email within 1-3 business days of submitting your payment online. For check payments, you will receive this email within 3-5 business days of our payment receipt date.

You may also sign in to your account online to check your payment status. Click on the ‘Manage Rosters’ menu option. The roster status for the particular roster will show ‘Payment Processing’ if we have received your payment or ‘Payment Posted’ if we have received your payment and the payment has cleared.
### Employer Portal

#### Manage Rosters

Use this page to view the rosters you've created or to create a new roster.

To create a new roster, click the "Download Roster Template" link below and add your employees for whom you are making SF City Option contributions to the roster template. To import your saved and completed roster template, click the "Browse" button. After selecting the file name, click the "Import" button.

To create the roster directly in the portal, click the "Create New" button and enter in your employee information one by one.

Please refer to the Employer Portal User Guide for additional instructions.

#### Download Roster Template

<table>
<thead>
<tr>
<th>Roster Created</th>
<th>Roster Status</th>
<th>Last Updated</th>
<th>Last Updated By</th>
<th>Roster ID</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2019 1:28:45 PM</td>
<td>Payment posted</td>
<td>07/01/2019</td>
<td>DahSrikantha</td>
<td>DANS01000003049</td>
<td>Export</td>
</tr>
<tr>
<td>7/1/2019 1:27:48 PM</td>
<td>Payment processed</td>
<td>07/01/2019</td>
<td>DahSrikantha</td>
<td>DANS01000003049</td>
<td>Export</td>
</tr>
<tr>
<td>7/1/2019 1:22:45 PM</td>
<td>Edited</td>
<td>07/01/2019</td>
<td>DahSrikantha</td>
<td>DANS01000003047</td>
<td>Export</td>
</tr>
<tr>
<td>7/1/2019 12:29:45 PM</td>
<td>Roster submitted</td>
<td>07/01/2019</td>
<td>DahSrikantha</td>
<td>DANS01000003046</td>
<td>Export</td>
</tr>
</tbody>
</table>
Loss of Online Payment Privileges

When you are ready to pay online, select the ‘Manage Rosters’ menu option and click on the ‘Pay Now’ link corresponding to the roster for which you want to submit payment.

If your electronic payment is rejected, you may receive a temporary restriction on your ability to pay electronically. Instead of arriving at the standard ‘Pay Now’ screen to proceed with payment, you will receive a message as noted below. Please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org to find out what steps need to be taken in order to have payment privileges restored. You may have lost payment privileges because you requested that your bank decline payment processing or because you need to provide your bank with our ACH ID: 5330903620 to process payment.
Editing a Roster

You can edit any roster in ‘Editing’ or ‘Submitted’ status. Click on the ‘Manage Rosters’ menu option and then click on the ‘Editing’ or ‘Submitted’ hyperlink corresponding to the roster you want to edit.

You will be taken to the Import Roster screen. You can add an employee to the roster by clicking on the ‘Add Employee’ button, delete an employee from the roster by clicking on the trashcan icon corresponding to the employee, and edit an employee record by clicking on the pencil icon corresponding to the employee. When you are finished with making your edits, click on the ‘Review’ button to proceed with the roster review and submission process.
Viewing Roster History

Click on the ‘Manage Rosters’ menu option on the left side of the webpage. The Manage Rosters screen will display all the rosters ever created for your business that have not been deleted. This includes rosters successfully submitted to SF City Option, as well as rosters started but not submitted.

The Roster Status specified on the Manage Rosters screen reflects the following information about the roster:

1. **Editing** – The roster is in draft status. You can update and change employee information.

2. **Submitted** – The roster has been reviewed for warnings and errors, the employer has agreed to the Terms and Conditions, and the employer has clicked on the ‘Submit’ button in the Employer Portal. You can update and change employee information.

3. **Payment Processed** – The SF City Option Program has received payment for the roster. However, the payment has not yet cleared the bank. You can no longer make changes to the roster.

4. **Payment Posted** – The payment for the roster has cleared the bank and the funds have been assigned to the employees on the roster. You can no longer make changes to the roster.

Rosters created in 2008 are no longer available in the Employer Portal. Please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org if you need roster information from 2008.
You may view employee information associated with each submitted roster by clicking on the Roster Status hyperlink for the particular roster. Clicking on ‘Submitted,’ ‘Payment processing,’ or ‘Payment posted’ will take you to the “View Roster” screen.

The information shown reflects current information in the SF City Option system, including changes to employee information after the Roster Submitted date. To see what was submitted in the roster, click on the ‘View Submitted Roster’ button.
Printing a Roster

To print a roster, (1) select the ‘Manage Rosters’ menu option, and click on the ‘Print’ hyperlink corresponding to the roster you want to print.

The printout includes employee name, address, phone number, and contribution amount. Do not include the printed roster with your payment to SF City Option.
Deleting a Roster

You can delete a roster from that is in ‘Editing’ or ‘Submitted’ status. Once a roster status has been updated to ‘Payment Processed’ or ‘Payment Posted’ the roster can no longer be deleted or changed. Once you delete a roster, the Employer Portal will no longer store that information.

To delete a roster, (1) select the ‘Manage Rosters’ menu option, and (2) click on the ‘Delete’ hyperlink corresponding to the roster you want to delete.
After You Submit a Roster and Make a Payment

Under the Health Care Security Ordinance, after the first time you submit a payment to SF City Option on behalf of an employee, you must send the employee an Employee Health Care Payment Confirmation notice. To download the notice, visit the San Francisco City Option website at www.sfcityoption.org, go to the Employer Resources tab, and click on “Download Materials.”

Next Steps for Employees
Employees are not automatically enrolled in a health care program after your first contribution to SF City Option on their behalf. SF City Option uses the employee contact information you provided in your rosters to send a welcome letter to each employee. In the welcome letter, the employee is instructed to fill out an SF City Option Program Finder Form that will help SF City Option determine their program eligibility and enroll them in one of three programs: SF MRA, SF Covered MRA, or Healthy San Francisco. After they are enrolled in one of these programs, your contributions will be assigned to that program for the employee.

Program Information
Your employees receiving contributions will be able to enroll in one of the following SF City Option program they are eligible for:

SF MRA
Employees may be eligible for the SF MRA program if they live outside of San Francisco or have health insurance through an employer, spouse or parent’s plan, Medi-Cal, or Medicare. Employees enrolled in SF MRA can use the funds in their Medical Reimbursement Accounts to get reimbursed for eligible health care expenses, including out-of-pocket costs related to medical, dental, and vision care products and services.

SF Covered MRA
Employees may be eligible for the SF Covered MRA program if they live in San Francisco, are required by law to have health insurance, and purchase health insurance through Covered California. Employees enrolled in SF Covered MRA will be eligible for additional help paying their Covered California premiums and can use the funds in their Medical Reimbursement Accounts to pay for health insurance premiums and other eligible health care expenses.

Healthy San Francisco
Employees may be eligible for Healthy San Francisco if they are uninsured, not eligible for public health insurance like Medi-Cal, and live in San Francisco. Once enrolled in Healthy San Francisco, the employee receives a discount on program participant fees and can get access to health care services at certain health care providers in San Francisco. The employer contribution goes to Healthy San Francisco to support the employee’s enrollment and participation in that program.

More information about SF City Option is available online at: www.sfcityoption.org.
Managing Your Employer Portal Account

This chapter describes how to manage the users and information related to your account.

The Employer Portal allows for a single employer account to have multiple users with separate login information. A user is either a Primary User or a Secondary User.

A Primary User is authorized to:
1. Edit all users’ profiles;
2. Add other users;
3. Activate or deactivate user accounts;
4. Edit the company’s information;
5. Create, edit, and submit employee rosters;
6. Edit employee information; and
7. Make online payments.

There is only ONE Primary User for each employer account. By default, the person who created the new employer account is the Primary User, but the Primary User may designate another user for this role.

A Secondary User is authorized to:
1. Edit his/her own user profile;
2. Submit and edit employee rosters;
3. Edit employee information; and
4. Make online payments.

Secondary users only see their own user profile in the Employer Portal. Secondary users cannot “promote” themselves into the role of Primary User.

If you are unable to access the employer account because the administrator is no longer with the company or if you need assistance managing user accounts, please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org.
Managing Your User Profile

SF City Option uses the contact information in your user profile to communicate with you. It is important that you maintain updated contact information with us to ensure that you receive program updates and information.

If you are a Primary User, to update information in a user profile, (1) select the ‘Manage Account’ menu option, (2) select the ‘Manage Users’ tab, (3) click on the ‘Edit’ hyperlink corresponding to the user profile you would like to edit, and (4) edit the pop-up box with updated information and click on the ‘Update’ button.
If you are a **Secondary User**, to update information in your user profile, (1) select the ‘**Manage Account**’ menu option, and (2) edit your account with updated information and click on the ‘**Update**’ button.
Managing Your Company Profile

Only the Primary User can edit the company profile. To edit company information, the Primary User must: (1) select the ‘Manage Account’ menu option, (2) select the ‘Manage Employer’ tab, and (3) edit the account with updated information and click on the ‘Save’ button.

Changing the Tax ID number (TIN) associated with your employer account will result in the creation of a new employer account. If you need to change the Tax ID number associated with your employer account, please first contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org to discuss the impact of the Tax ID number change on your employees’ access to health care benefits.
Adding Users

Only the Primary User can add other users ("Secondary Users") to the employer account. To add Secondary Users, the Primary User must: (1) select the ‘Manage Account’ menu option, (2) select the ‘Manage Users’ tab, (3) click on the ‘Add User’ button, and (4) enter the Secondary User’s information in the pop-up box and click on the ‘Create’ button.

Check Your Email. After a Primary User has created a Secondary User’s account, the Secondary User will receive a confirmation email containing account login information.
Activating and Deactivating Accounts

Only the Primary User can activate and deactivate other users’ accounts. Active users receive communications from SF City Option about the employer account and news/updates about the program. By default, all user accounts are in ‘active’ status until deactivated by the Primary User.

To deactivate (or reactivate) accounts, the Primary User must: (1) click on the ‘Manage Account’ menu option, (2) select the ‘Manage Users’ tab, (3) remove (or add) the check box from the ‘Active’ column, and (4) click the ‘Save’ button.

The Primary User can also “demote” his/her user profile to no longer be the primary user by selecting the button under the ‘Primary User’ column to designate another user for the role.
Managing Employees

This chapter provides guidance about how to manage employee demographic information, including how to make changes to employee information in the Employer Portal.

Updating Employee Information

Click on the ‘Manage Employees’ menu option. You will see the Manage Employees screen containing all employees who have ever appeared on your submitted rosters.

You may search for a particular employee by the last 4 digits of SSN, DOB, first name, and/or last name.

To make changes to an employee’s information, click on the ‘Edit’ link to the left of the employee’s record. Any changes that you make directly into the Employer Portal will override information submitted on a prior roster or information that SF City Option has already received from your employee.

➤ Note: If you attempt to change an employee’s SSN and the SSN is already in our system for another employee at your company, you will get an error message. Please contact SF City Option at 1(415) 615-4492 to change the employee’s SSN.
If our program has been unable to reach your employee by mail and/or phone, the ‘Employee Details’ page will display message(s) in red next to the address and/or phone number. If possible, follow up with your employee to obtain updated contact information and enter the updated contact information in the Employer Portal.

![Employee Details](image)

Our program flags an employee address as invalid after mail gets returned to us as undeliverable or because the employee is no longer at the address provided.

Our program flags an employee phone number as invalid after unsuccessful call attempts because the phone number does not belong to the employee or is invalid, disconnected, no longer in service, or a fax number.
You can check the history of changes made to an employee’s account and the user who made the changes. Once on the ‘Employee Details’ page, click on the ‘View History’ button to see all changes to an employee’s information.

Check Your Email. When SF City Option receives updated information from your employees, you will receive an email notification describing the changes. Update your internal records to reflect the changes or contact SF Option at 1(415) 615-4492 or employerservices@sfcityoption.org if you believe the updates to be inaccurate.
Exporting Employee Data

The employee information in the Employer Portal is the most current and up-to-date information on record with San Francisco City Option. To export an Excel file of employee data: (1) click on the ‘Manage Employees’ menu option, and (2) click on the ‘Export Employees’ button.

⇒ Note: Only the last 4 digits of the employees’ SSNs are visible in the export file.
Appendix A: How to Format a CSV File for Your Roster

The following instructions are for formatting a CSV file using Microsoft Excel.

Note: The Roster Template only has the column header row pre-populated. Necessary custom formatting is still required.

Step 1: Format Your File

1. Open Microsoft Excel.

2. If you are not using the Roster Template, create your file’s header row by typing the following column names exactly (without quotation marks or spaces between words):
   - In cell A1, type SSN
   - In cell B1, type DOB
   - In cell C1, type FirstName
   - In cell D1, type MI
   - In cell E1, type LastName
   - In cell F1, type Address1
   - In cell G1, type Address2
   - In cell H1, type City
   - In cell I1, type State
   - In cell J1, type ZIP
   - In cell K1, type PrimaryPhone
   - In cell L1, type AlternatePhone
   - In cell M1, type OtherHealthCoverage
   - In cell N1, type ContributionAmount

3. You must use custom formatting to display any leading zeroes in Social Security numbers properly. Highlight and right-click on column A, and select ‘Format Cells’. In the ‘Number’ tab, select ‘Custom’ as the Category. In the ‘Type’ field, enter 000000000 and click ‘OK’.

agog Note: If you do not use custom formatting, Social Security numbers with leading zeroes will not display properly in the Employer Portal and you will encounter errors during the import process.
4. Enter employee data in the format specified below. Each row should correspond to one employee. Go to Employee Information for Rosters for additional instructions about each data field.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Formatted Example</th>
<th>Min/Max Field Length</th>
<th>Required Field?</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>Social security number</td>
<td>123456789</td>
<td>9/9</td>
<td>Required</td>
</tr>
<tr>
<td>DOB</td>
<td>Birth date</td>
<td>02/14/1970</td>
<td>10/10</td>
<td>Required</td>
</tr>
<tr>
<td>FirstName</td>
<td>First name</td>
<td>Randall</td>
<td>1/50</td>
<td>Required</td>
</tr>
<tr>
<td>MI</td>
<td>Middle initial</td>
<td>S</td>
<td>0/1</td>
<td>Optional</td>
</tr>
<tr>
<td>LastName</td>
<td>Last name</td>
<td>Taylor</td>
<td>1/50</td>
<td>Required</td>
</tr>
<tr>
<td>Address1</td>
<td>Personal address line 1</td>
<td>201 First Street</td>
<td>1/255</td>
<td>Required</td>
</tr>
<tr>
<td>Address2</td>
<td>Personal address line 2</td>
<td>Apt 3</td>
<td>0/255</td>
<td>Optional</td>
</tr>
<tr>
<td>City</td>
<td>Personal city</td>
<td>San Francisco</td>
<td>1/50</td>
<td>Required</td>
</tr>
<tr>
<td>State</td>
<td>Personal state (abbreviation)</td>
<td>CA</td>
<td>2/2</td>
<td>Required</td>
</tr>
<tr>
<td>ZIP</td>
<td>Personal zip code</td>
<td>94102</td>
<td>5/5</td>
<td>Required</td>
</tr>
<tr>
<td>PrimaryPhone</td>
<td>Personal primary phone number</td>
<td>4155552000</td>
<td>10/10</td>
<td>Required</td>
</tr>
<tr>
<td>AlternatePhone</td>
<td>Personal alternate phone number</td>
<td>4155551234</td>
<td>0/10</td>
<td>Optional</td>
</tr>
<tr>
<td>OtherHealthCoverage</td>
<td>Does this employee have other health insurance? (YES/NO/UNKNOWN)</td>
<td>NO</td>
<td>2/7</td>
<td>Required</td>
</tr>
<tr>
<td>ContributionAmount</td>
<td>The amount contributed for this employee (must be greater than $0.00)</td>
<td>123.45</td>
<td>2/8</td>
<td>Required</td>
</tr>
</tbody>
</table>

After entering two employees, your file should look something like this:

```
   A   B    C       D       E         F        G   H       I   J       K        L       M       N
  1  SSN  DOB      FirstName  MI  LastName  Address1  Address2  City  State  ZIP  PrimaryPhone  AlternatePhone  OtherHealthCoverage ContributionAmount
  2  123456789  2/14/1970    MICKEY    M  MOOSE   100 First St  1001 Second St  Foster City  CA  94404  4155552000  NO
  3  0123456789  2/2/1972    WINNIE    T  POOH   100 First St  1002 Second St  Anchorage  AK  99907  9032111234  NO  123.45
  4  0123456789  2/2/1972    WINNIE    T  POOH   100 First St  1002 Second St  Anchorage  AK  99907  9032111234  YES
```
Important notes:

- Do not include employees receiving a contribution of $0.00. Do not include employees who you do not want to receive health care benefits through SF City Option.
- **Middle Initial** (MI), **Address2**, and **Alternate Phone** are optional fields for each employee row, but all three columns must be present in the file in order for the roster to import properly. Leave the cell blank if the information is not applicable for the particular employee, but make sure the columns are present in the spreadsheet.
- If your file has missing columns, extra columns, missing rows, or extra rows, it will not import properly.
  - For example, off-to-the-side calculations will cause an error.
  - For example, extra rows such as a title row "Company X Roster Quarter 3 2013" will cause an error.
- Each field may not exceed its maximum field length. Make sure you do not have blank spaces preceding or trailing any field value if not necessary.
  - For example, an SSN that is entered as “123456789   ” will cause an error because of the extra spaces after the last digit.

Step 2: Save your file

Once you have listed all of your employees, save your file as a CSV file.

1. From the ‘File’ menu option, select ‘Save As’ and select ‘Other Formats.’
2. Select a location on your local drive or network to save your file.
3. In the ‘File Name’ field, type a name for the file.
4. From the ‘Save as type’ drop-down menu, scroll down to select “CSV (Comma delimited) (*.csv)” and click on the ‘Save’ button.
→ Note: If you open the CSV file, it may not look like the original Excel spreadsheet you created. Do not be alarmed. If you followed these instructions, the file will import properly.

Your file is now ready to import to the Employer Portal website. Please return to Method One: Uploading a Roster.