Employer Portal User Guide
Last Updated: October 2023

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Employer Portal User Guide

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) or comply with the Healthy Airport Ordinance.
When you make contributions through the SF City Option Program, your employees are eligible for a Medical Reimbursement Accounts (SF MRA) to pay for health care expenses. For more information about SF City Option, visit www.sfcityoption.org.

The **Employer Portal** is an 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://sf.gov/information/health-care-security-ordinance.
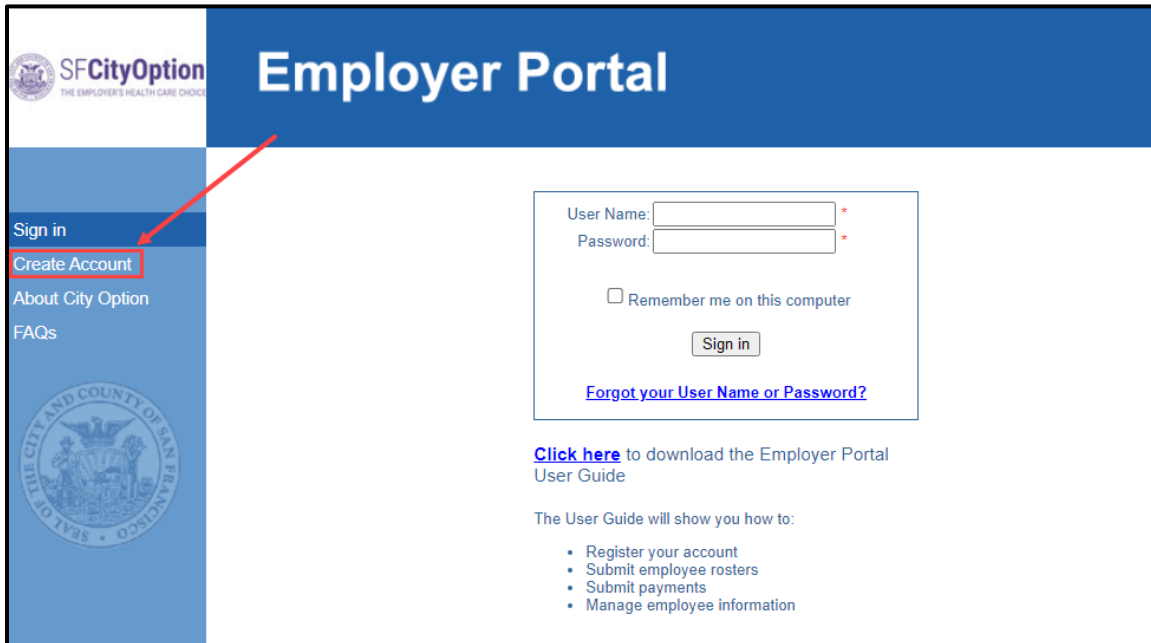
If you have questions about the Healthy Airport Ordinance, please contact the San Francisco Office of Labor Standards Enforcement at 1(415)554-7903 or hcao@sfgov.org, or visit their website at https://sf.gov/information/healthy-airport-ordinance.

Accessing Your Employer Portal Account

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

> ✉ **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 into 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. Contact us if you can't create a new password because your security questions were not set-up.

![SF CityOption - THE EMPLOYER'S HEALTH CARE CHOICE]
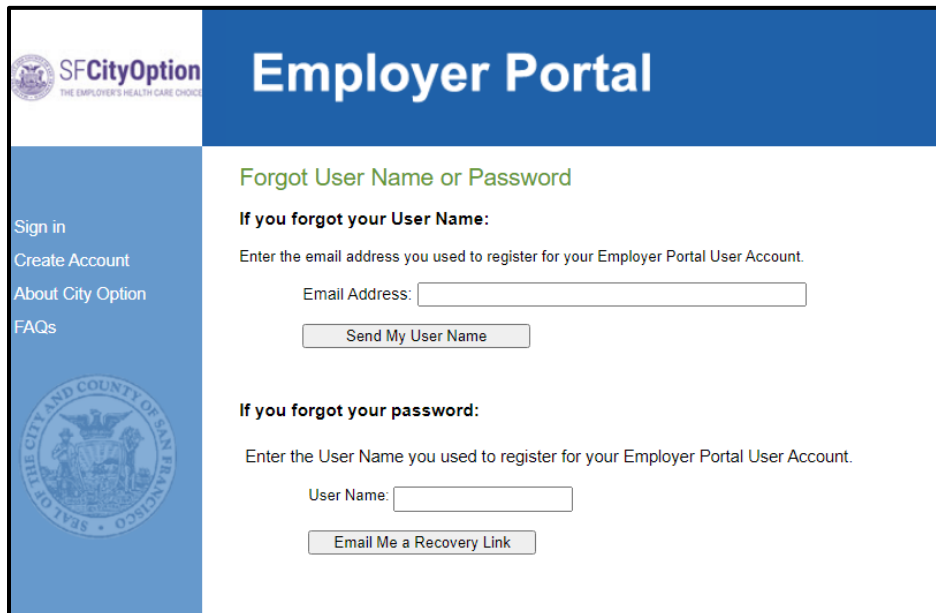
Forgot Your User Name or Password?

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 User Name.'**

> ✉ **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 link to reset your password will be sent to the email address associated with the user name. The portal will prompt you to respond to one of your security questions, and then create a new password.

After five consecutive failed attempts to log in to your account, you will be locked out of your account. You should see a pop-up message that says to recover your password "by clicking the "Forgot Your User Name or Password?" link.

Please contact SF City Option at **1(415) 615-4492** or **employerservices@sfcityoption.org** if you are unable to reset your password.
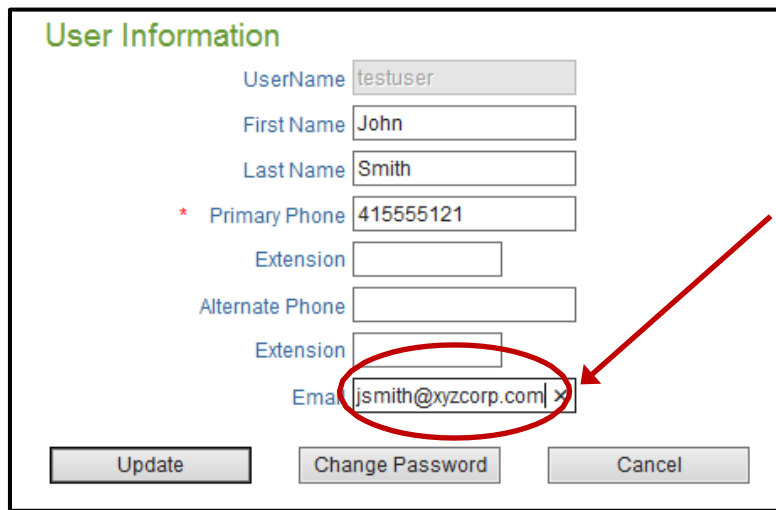
Changing Your Password

Passwords expire after 90 days for security reasons and must meet the password complexity requirements.

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 rosters through the Employer Portal in order to make contributions towards medical reimbursement accounts on behalf of eligible employees.

Because we use the employee information you provide us to contact your employees about their medical reimbursement accounts, **it is critical that you submit accurate and up-to-date employee information.**
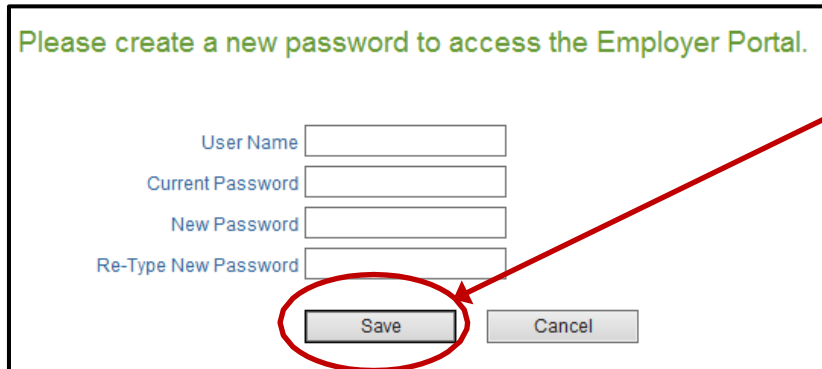
Employee Information for Rosters

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.

Employee Information	Instructions
SSN	Required. This must be 9 digits without dashes. Do not provide an invalid SSN (e.g. 999999999).
Date of Birth	Required. This must be in MM/DD/YYYY format.
First Name	Required. Do not use special characters such as dashes or apostrophes in the First Name.
Middle Initial	Optional.
Last Name	Required. Do not use special characters such as dashes or apostrophes in the Last Name.
Address Line 1	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 **SF MRA.**
Address Line 2	Optional.
City	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.
State	Required. This must be the two letter state abbreviation.
Zip Code	Required. This must be 5 digits only.

Primary Phone	Required. This must be 10 digits without dashes or parentheses. This must be your employee's personal phone number. Do not provide a company phone number or an invalid phone number (e.g. 9999999999). We use the phone numbers you provide to communicate with your employees by phone about their **SF MRA**.
Alternate Phone	Optional.
Email	Optional.
Contribution Amount	Required. This is the amount you will be paying into an SF MRA for the employee. Do not include employees on the roster who are not owed contributions. For information about the minimum health care expenditure rate: • Health Care Security Ordinance: visit the Office of Labor Standards Enforcement website at Health Care Security Ordinance | San Francisco (sf.gov). • Healthy Airport Ordinance: visit their website at Healthy Airport Ordinance | San Francisco (sf.gov)

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 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: Health Care Security Ordinance | San Francisco (sf.gov) or review the Healthy Airport Ordinance at Healthy Airport Ordinance | San Francisco (sf.gov)

If you need help with making your minimum employer spending requirement calculations, please contact the San Francisco Office of Labor Standards Enforcement at **1(415) 554-7892.**

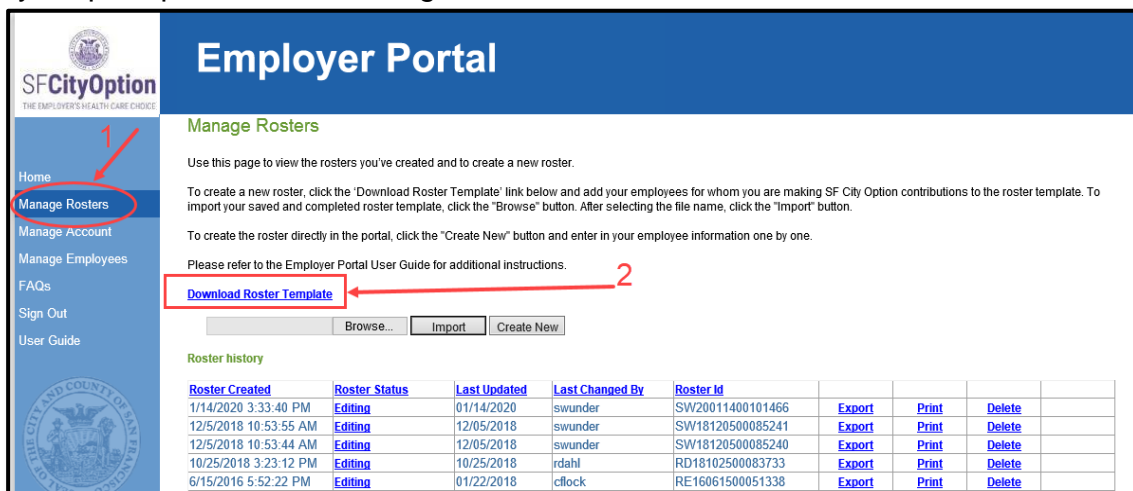You can create an employee roster by one of two methods:
1. **Upload a roster** with employee information from an Excel spreadsheet saved as a CSV file. This is the preferred method by our Employers.
2. **Create a roster directly in the Employer Portal** by manually entering employee information.

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. Depending on your web browser, you may be prompted with the dialog box to download or save the file.

3. Save the roster template on your computer.

4. Add employees eligible for SF City Option contributions to the roster template. After entering two employees, your file should look something like this:
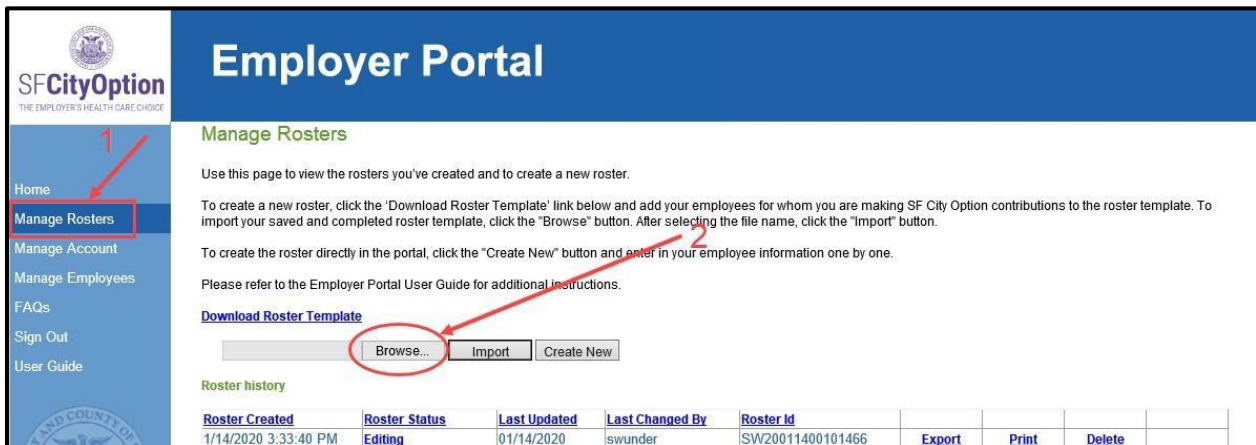
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	SSN	DOB	FirstName	MI	LastName	Address1	Address2	City	State	ZIP	PrimaryPhone	AlternatePhone	Email	ContributionAmount
2	123456789	1/1/1971	Mickey		Mouse	50 Beale St		San Francisco	CA	94105	5555555555		Mickey@disney.com	750.20
3	012345678	2/2/1972	Winnie	T	Pooh	7 Spring St		San Francisco	CA	94104	4155555555		Winnie@disney.com	1689.90

5. 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 Appendix A. Do not include commas in any of the cells.

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.

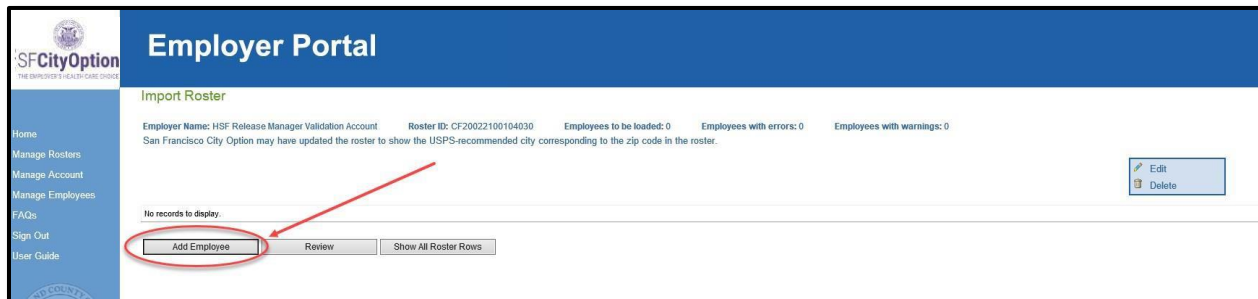## Method Two: Creating a Roster Directly in the Employer Portal

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.
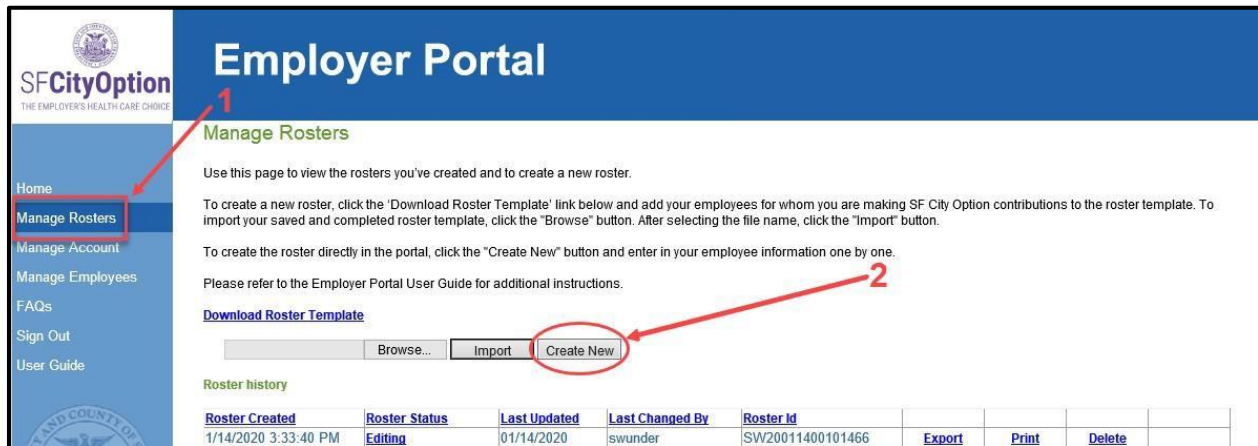
1. Click on the **'Add Employee'** button.

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).

Employee Details

SSN xxxx:	
Date of birth	
First name	
MI	
Last name	
Address line 1	
Address line 2	
Zip	
City	
State	CA
Primary phone	
Alternate phone	
Email	

[Save] [Cancel] [View History]

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.

Employer Portal

Import Roster

Employer Name: ▉▉▉ Corporation   **Roster ID:** SE23092900150226   **Employees to be loaded:** 4   **Employees with errors:** 0   **Employees with warnings:** 0

San Francisco City Option may have updated the roster to show the USPS-recommended city corresponding to the zip code in the roster.

Instructions on How To Proceed:
There are no errors found in your roster. Click the REVIEW button to review the data that will be imported.
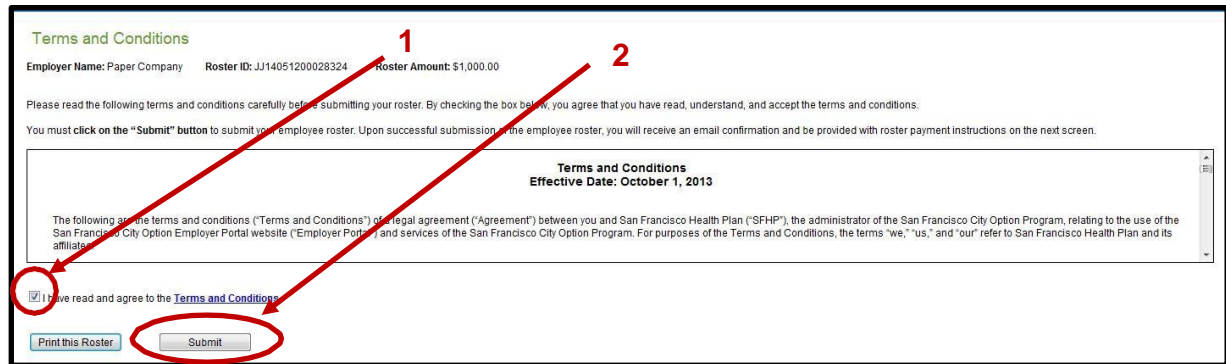
✏ Edit   🗑 Delete

	SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Email	Amount	Status
✏🗑	▉	▉	Issa		Smith	50 Beale Street		San Francisco	CA	94105	4156155694	4156155695		1.00	
✏🗑	▉	▉	Jordan		Song	50 Beale Street		San Francisco	CA	94105	4156155691			1.00	
✏🗑	▉	▉	Colin		Reed	50 Beale Street		San Francisco	CA	94105	4156155692			1.00	
✏🗑	▉	▉	Felix		Robins	50 Beale Street		San Francisco	CA	94105	4156155693			1.00	

[Add Employee] [Review] [Show All Roster Rows]

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 have 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 <mark>orange bar</mark> 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:

Error Type	Error Name	Error Description
1	SSN Invalid	Missing digits or improper format
2	Phone Number Invalid	Missing digits or improper format
3	DOB Invalid	Missing digits or improper format
4	Multiple Employees with The Same SSN	Multiple employees on your roster have the same SSN
5	Verify Employee SSN	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)
6	Verify Employee DOB	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)
7	Verify Employee Last Name	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)
8	Verify Employee First Name	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)
9	Email Invalid	Missing characters or improper format.

![SFCityOption - THE EMPLOYER'S HEALTH CARE CHOICE]

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, combine the contributions for the employee into one record. Delete all records except for one and then edit the contribution amount to reflect the total for the employee.

If you need assistance, contact SF City Option at **1(415) 615-4492**.

Employer Portal

Error: Duplicate record(s) found

Multiple Employees with the Same SSN

You entered the same SSN for multiple employees.

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 employee 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.

Only the last 4 digits of the employee's SSN are displayed for security reasons. If you need help with this roster, call (415) 615-4492.

SSN	DOB	First Name	MI	Last Name	Address	Primary Phone Number	Alternate Phone Number	Contribution Amount		
xxxxx6555	■	■	M	■	■	415	415	857.12	Edit	Delete
xxxxx6555	■	■	B	■	■	916	415	669.86	Edit	Delete

<< Back to Roster

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.

Verify Employee First Name and Last Name

You entered employee information that is different from information already in our system. Information in our system reflects what your company submitted in a previous roster or what the employee updated since a previous roster. Select an option below to continue.

Information in This Roster:		**Information in City Option System:**	
SSN:		SSN:	
Date of Birth:		Date of Birth:	
First Name:	Jacquelin	First Name:	Jacqueline
Last Name:	Smit	LastName:	Smith
Use Information from This Roster		Use Information from City Option System	

<< Back to Roster

Verify Employee Date of Birth

You entered employee information that is different from information already in our system. Information in our system reflects what your company submitted in a previous roster or what the employee updated since a previous roster. Select an option below to continue.

Information in This Roster:		**Information in City Option System:**	
SSN:	94	SSN:	94
Date of Birth:	03/31/1990	Date of Birth:	03/31/1992
First Name:	J	First Name:	J
Last Name:	Smith	LastName:	Smith
Use Information from This Roster		Use Information from City Option System	

<< Back to Roster

Handling Warnings

Warnings are indicated with a <mark>yellow bar</mark> and encourage corrective action or investigation to determine 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 on time to comply with the Health Care Security Ordinance or the Healthy Airport Ordinance.

Late Payments: If payment was missed, reach out to the San Francisco Office of Labor Standards Enforcement (OLSE) to get guidance on how to come into compliance. Only pay through SF City Option for missed payments if that is the OLSE guidance. SF City Option cannot apply payments retroactively.

Timely payments are important. Submitted rosters are reverted to 'Editing' status if a payment is not received within 45 calendar days of roster submission. If your roster is reverted to 'Editing' status, you will need to resubmit the roster for SF City Option to process your payment.
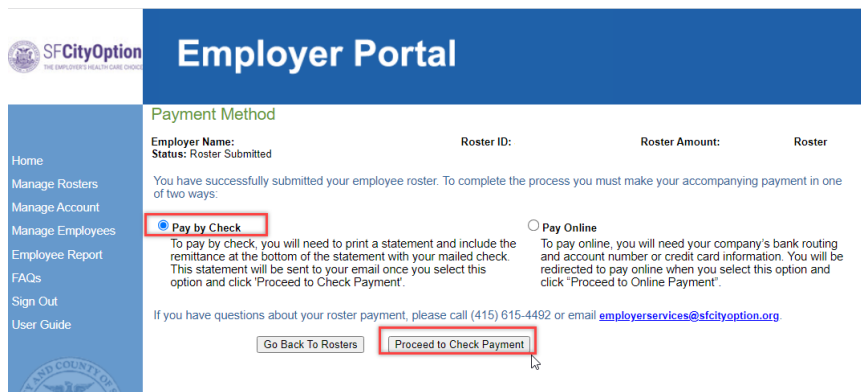
If you send payment and do not submit a roster within 30 calendar days of our receipt of your check, your check will be returned to you. You will need to submit the roster and resend payment.

➔ 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. If you have questions about Healthy Airport Ordinance (HAO) payment deadlines, contact the San Francisco Office of Labor Standards Enforcement (OLSE) at hcao@sfgov.org.

How to Make a Payment

Paying By Check

Once you have submitted your roster, check the box next to 'Pay by Check' and then click on the 'Proceed to Check Payment' button. A SF City Option Statement will be immediately emailed to your address associated with your Employer Portal account.

➔ **Print the emailed SF City Option Statement and detach the remittance at the bottom of the statement and include it with your mailed check.**

NOTE: The SF City Option statement will be sent to all email addresses associated with your company's SF City Option Employer Portal account. If you did not receive it, go to Manage Rosters and click on the 'Pay Now' button next to the roster you are paying. This will take you to the page where you will select "Pay by Check" to re-send your SF City Option Statement. If you did not receive a statement, please check your spam folder.

Make check payable to SF City Option. Include the Remittance Coupon with your check.

US Postal Service/Regular Mail	Overnight Delivery
San Francisco City Option PO Box 7720 San Francisco, CA 94120-7720	City National Bank 2490 Mariner Sq. Loop, Suite 250 Alameda CA, 94501 Attn: SF City Option Lockbox 7720

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

Paying by Credit Card or Electronic Funds Transfer

After you submit your roster, select "**Pay Online**" and click on the **'Proceed to Online Payment'** button to start the process.

➔ Note: We do not accept payment by ACH deposit or wire.

➔ Note: Prior to an EFT payment, check with your Finance Department or bank to confirm that your account does not have a debit block. Your bank may request the following "originator code" or "ACH ID" to approve the online payment: 5330903620

➔ 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.

➔ Note: If paying by credit card, you will be required to pay a processing fee. We do not accept payment by American Express.

Have your bank account number and routing number or credit card ready, and click on **Manage Rosters** in menu option. Select the **'Pay Now'** link corresponding to the roster you want to pay.

Online payments are handled by our vendor Forte. When clicking on "**Pay Now**" button, you will be directed to their online payment portal.

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.
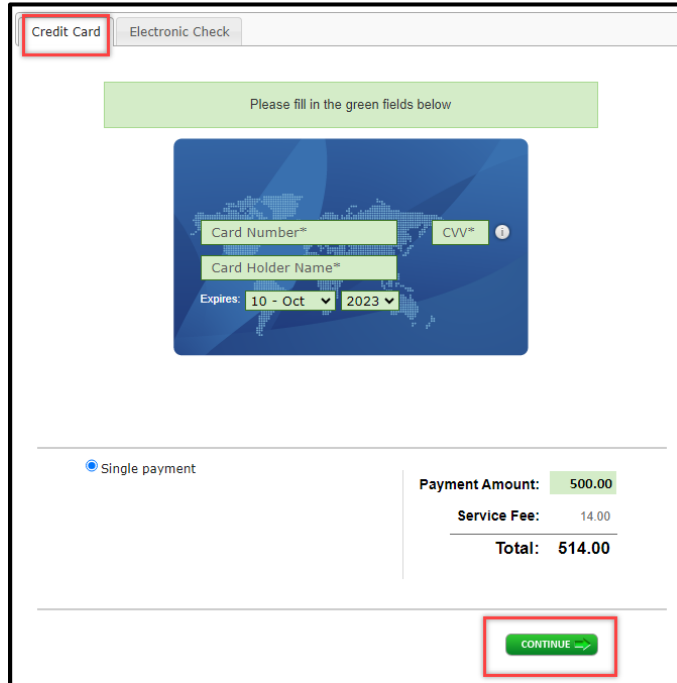
Pay by Credit Card

Select Credit Card in the tab.
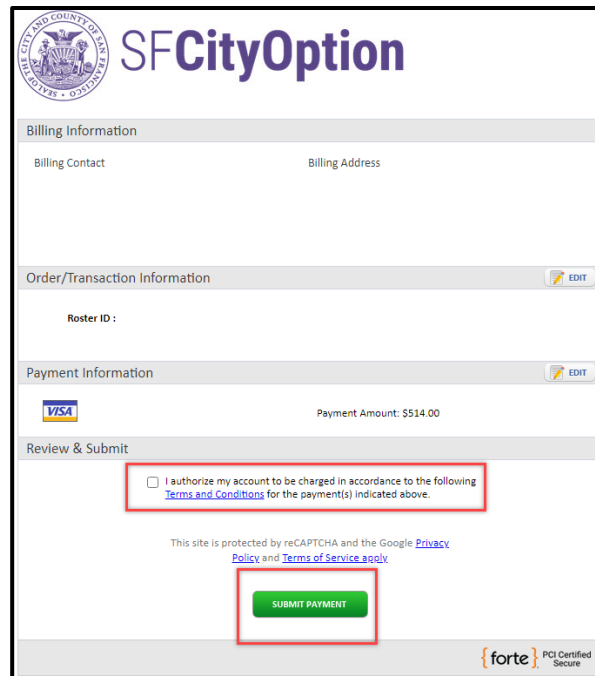
➔ Note: Payment Amount field is locked and cannot be changed. This field is populated directly from the roster that you submitted. If you would like to change the amount, you will have to cancel out of the online payment portal and return to the Employer Portal to edit your roster. Rosters cannot be edited once you have completed the online payment. If you have made an accidental or incorrect payment, please contact SF City Option at 415-615-4492 or employerservices@cityoption.org.

If you pay by credit card, enter your card number, card holder name, expiration date and CVV. Review the payment amount and click "**Continue**".

Check the box "I authorize my account to be charged in accordance to the following Terms and Conditions for the payment(s) indicated above." Then check the box "I am not a robot, select all images requested and click "Verify". After that, click "Submit Payment".
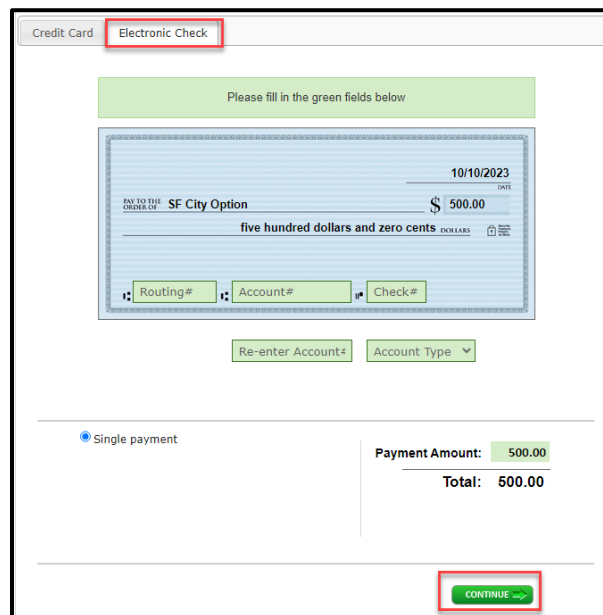
Pay by Electronic Funds Transfer (EFT) or E-check

Select "Electronic Check" in the tab to pay by Electronic Funds Transfer.

Enter bank account number and routing number into the Electronic Check. Below the Electronic Check, re-enter Account number and select Account Type from the dropdown menu. "Check #" field is optional and can be left blank.
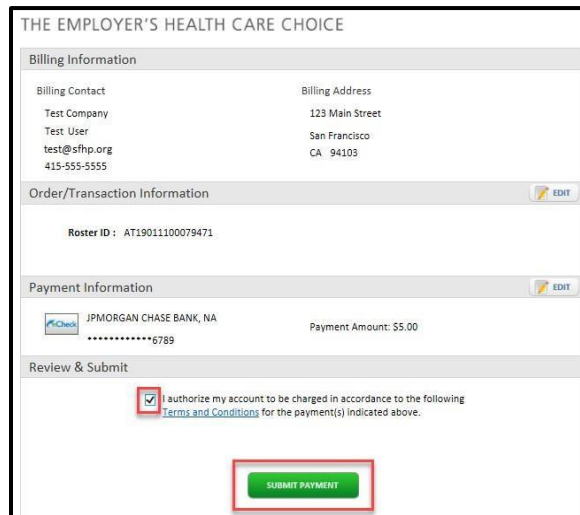
Once the bank account number is entered, the numbers are masked and appear only as asterisks (i.e. ***********). Select 'Continue' to go to the next step.

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 with 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.

After Submitting Online Payment
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 <u>before</u> 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.

➔ IMPORTANT: If your roster is still in "Submitted" status after making an online payment, DO NOT attempt payment again until the next day. It is likely that your roster will update to "Payment Processing" after we receive the nightly file from Forte.
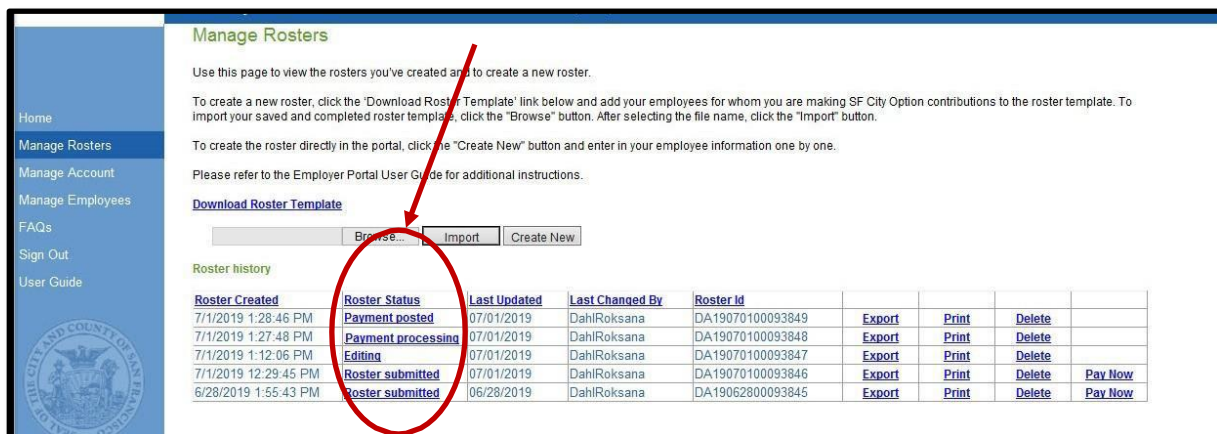
If you have questions about online payments to SF City Option, please contact us at **1(415) 615-4492** or **employerservices@sfcityoption.org**.

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 EFT payments, it will take 5 business days for the payment to clear. For check payments, your payment will clear within one business day of receipt.

You may check your payment status in the Employer Portal. 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. If paying online, roster status may not update until the next day.

Editing a Roster After Submitted

You cannot edit rosters in "Payment Processing" or "Payment Posted" status. However, you can edit any roster in 'Editing' or 'Submitted' status.

Click on the '**Manage Rosters**' menu option and then click on the **Roster Status** hyperlink corresponding to the roster you want to edit.

Once the roster is open to editing, you can do the following:
- 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.
- Edit an employee record by clicking on the pencil icon corresponding to the employee.

When you are finished making your edits, click on the **'Review'** button to proceed with the roster review and submission process.

Viewing Roster Status

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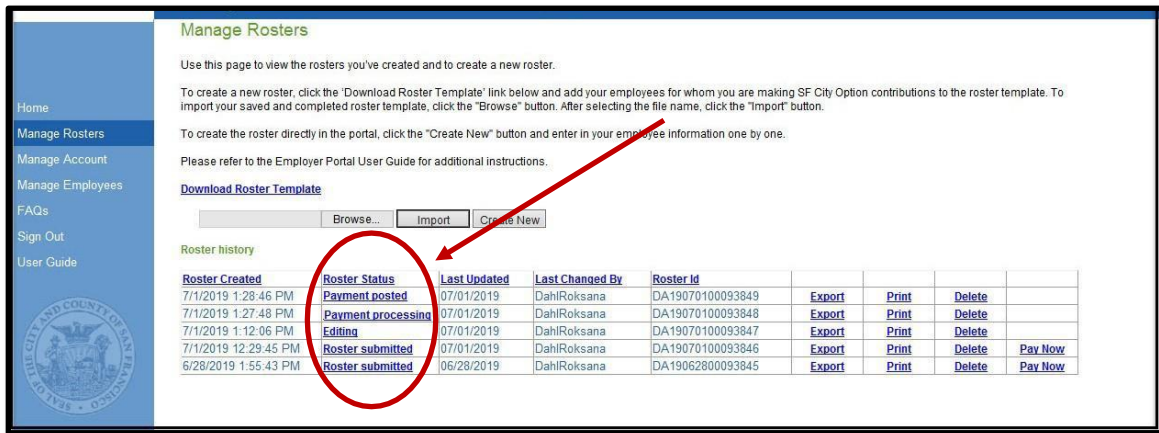
The Roster Status specified on the Manage Rosters screen reflects the following information about the roster:

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 or the Healthy Airport 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 https://sfcityoption.org/employers/about-us/employer-resources/.

You can give the **New Contribution Flyer** to your employees after you pay your roster. It explains the SF MRA program, how to enroll, and how long until they see the contribution in their account. We recommend that you provide this notice after every payment. To download this flyer, go to https://sfcityoption.org/files/SFCO_NewContributionNotice.pdf. This flyer is also available in Spanish, Chinese and Tagalog here.

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 MRA Enrollment Form. After they are enrolled, your contributions will be deposited into the employee's SF MRA account.

Program Information

Your employees receiving contributions will be able to enroll in for the SF MRA:

SF MRA

Employees enrolled in SF MRA can use the funds in their Medical Reimbursement Accounts to get repaid for eligible health care expenses, including out-of-pocket costs related to medical, dental, and vision care products and services.

More information about SF MRA is available online at: https://sfcityoption.org/sfmra/

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.

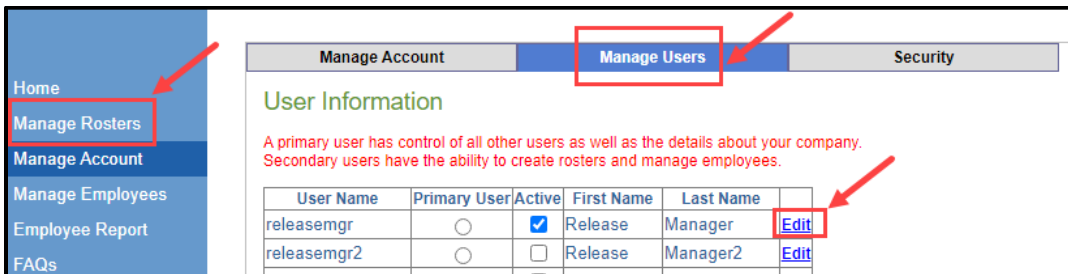Secondary users only see their own user profile in the Employer Portal. Secondary users cannot "promote" themselves into the role of Primary User.

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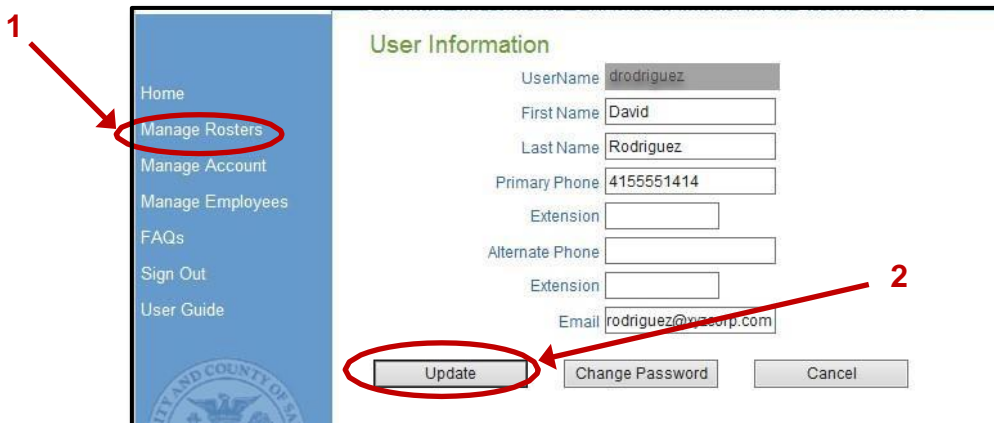
SF City Option uses the contact information in your user profile to communicate with you. It is important that you maintain updated contact information with us to ensure that you receive program updates and information.

If you are a <u>Primary User</u>, to update information in a user profile, select the **'Manage Account'** menu option, select the **'Manage Users'** tab, click on the **'Edit'** hyperlink corresponding to the user profile you would like to edit, and edit the pop-up box with updated information and click on the **'Update'** button.

If you are a <u>Secondary User</u>, to update information in your user profile, select the **'Manage Account'** menu option, and edit your account with updated information and click on the **'Update'** button.
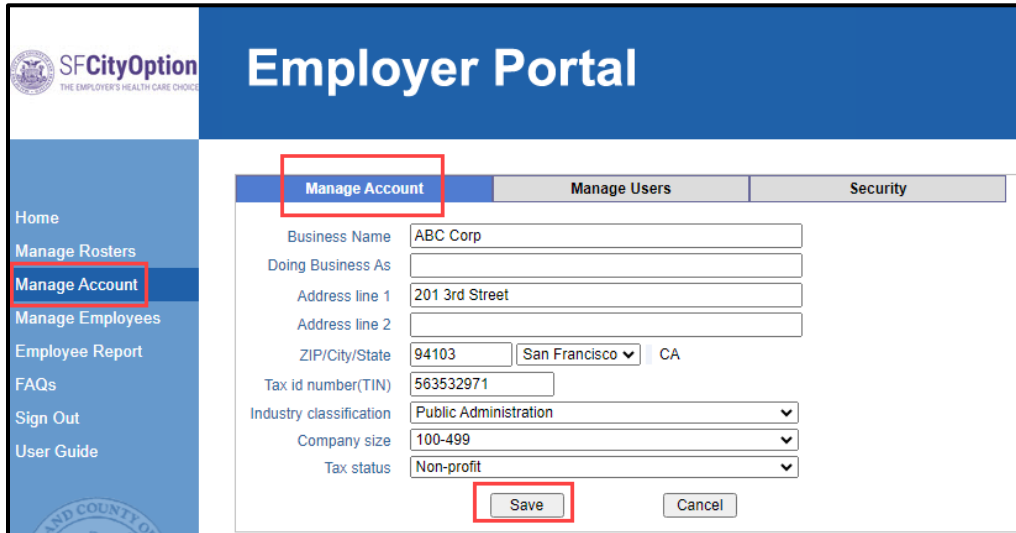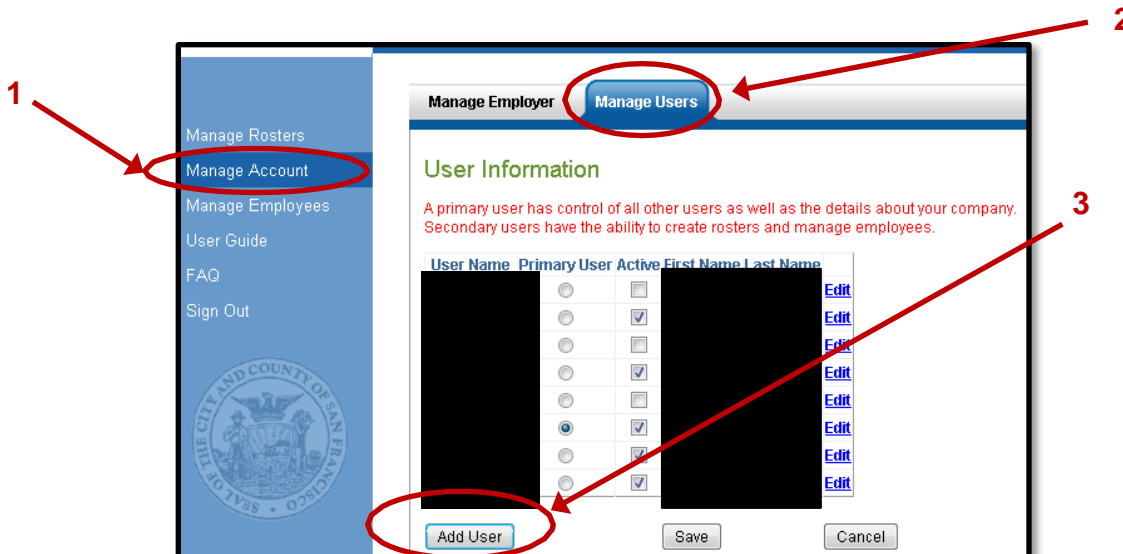
Managing Your Company Profile

Only the Primary User can edit the company profile. To edit company information, the Primary User must: select the **'Manage Account'** menu option, select the **'Manage Employer'** tab, and edit the account with updated information and click on the **'Save'** button.

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.

✉ **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 or SF City Option staff.

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 Employee Information

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.

Invalid Address or Phone Number

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.

Employer Portal

Employee Details

*** UPDATE INVALID EMPLOYEE INFORMATION IDENTIFIED BELOW.

Unable to Contact Employee at Primary/Alternate Phone: Phone number does not belong to the employee or is invalid, disconnected, no longer in service, or a fax number.

SSN xxxxx3645		9 digits only, no dashes
Date of birth	07/11/1984	
First name	Test	
MI		
Last name	Test	
Address line 1	50 Beale	
Address line 2		
Zip	94105	
City	San Francisco ∨	
State	CA	
Primary phone	4156155695	**Unable to Contact Employee at Primary Phone**
Alternate phone		
Email		
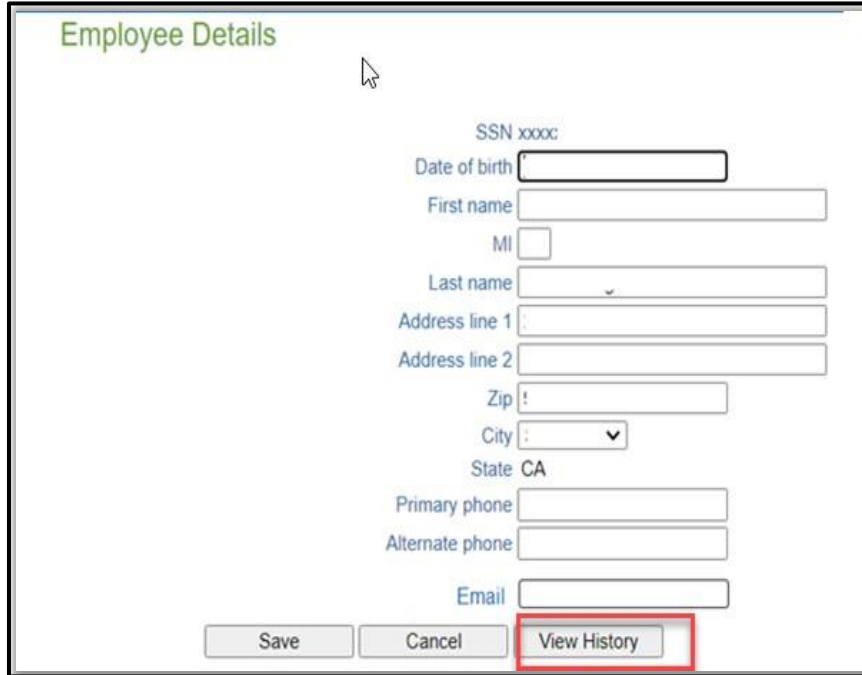
[Save]   [Cancel]   [View History]

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 a secure 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.

Employee Enrollment Reports

What's in this report?

The Employee Enrollment Report can help you identify current and former employees that still need to complete the SF MRA Enrollment Form. Employer contributions are not deposited into the SF MRA until the employee submits an SF MRA Enrollment Form. If an employee does not complete enrollment, their funds are at risk of being turned over to the City of San Francisco. To learn more about this new policy visit our website at www.sfcityoption.org/contributions.

Headers:

Most recent roster payment date: Payment Clearance Date of the most recent contribution that you made on behalf of the employee.

Needs to Enroll: "Yes" means this employee needs to submit an Enrollment Form because they have funds waiting for enrollment from either you or another employer. "No" means this employee has already enrolled or does not have funds waiting for enrollment.
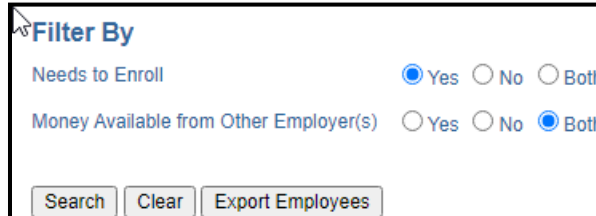
Money Available to Deposit into SF MRA: These funds will be deposited into the employee's SF MRA once the employee enrolls.

Money Available from other employer(s): "Yes" means this employee has funds waiting for enrollment from another employer. "No" means this employee does not have funds waiting for enrollment. This field will tell you if the $ in the "Funds Waiting for Employee Enrollment" include additional funds from other employers available for this employee when they enroll.

Download an Employee Enrollment Report to Target Outreach

1. Inside the employer Portal click on "Employee Report" in the Menu Option.
2. We recommend Filtering by these filters and clicking "Search"
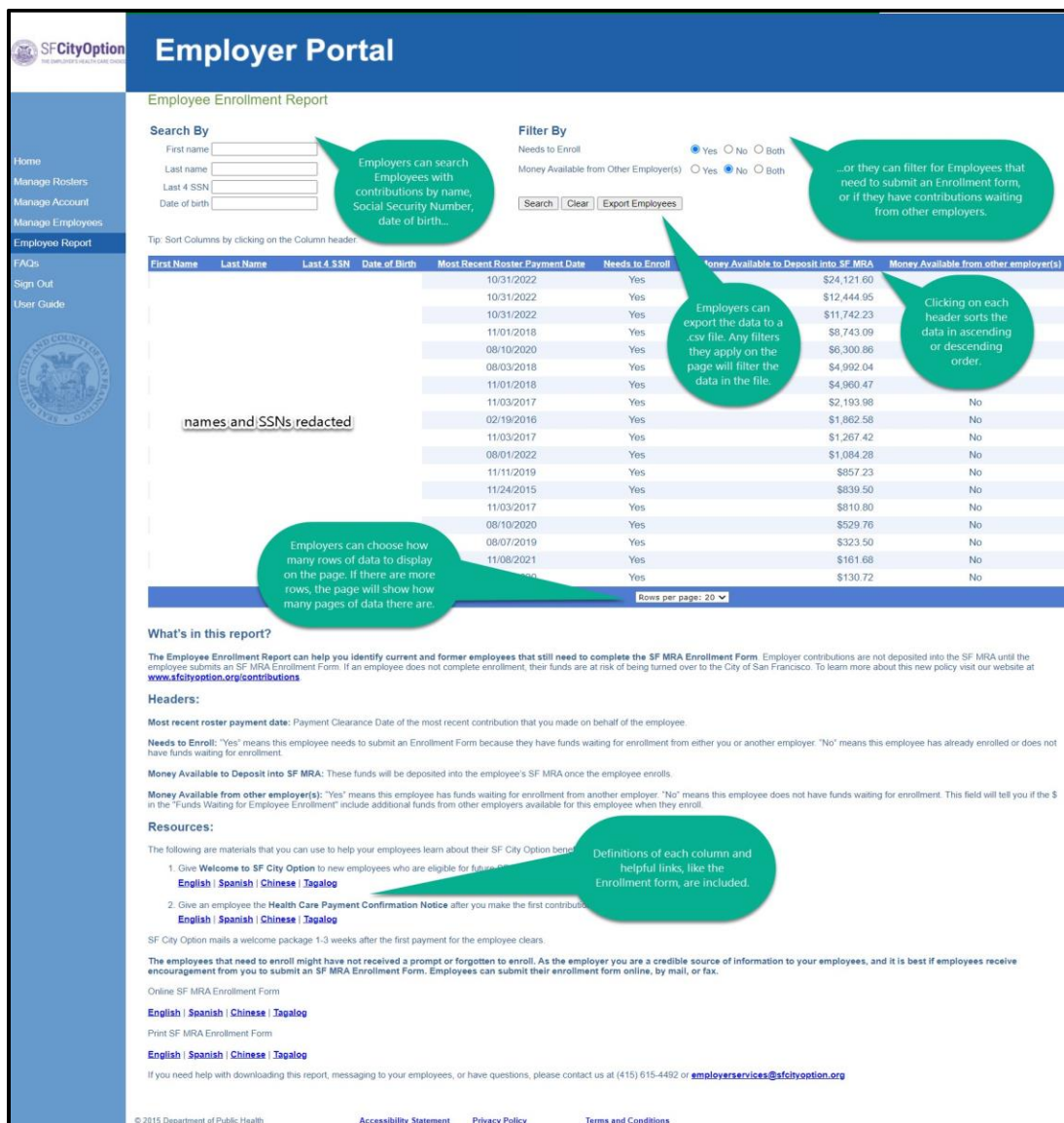
   Download the report by clicking on "Export Employees"
3. The report will show all your current and former employees that need to enroll ordered by their *Most Recent Roster Payment Date*. Those that have worked for you most recently will be at the top.
4. Reach out to former and current employees that still need to enroll.
5. You can contact employerservices@sfcityoption.org if you need help.

Other Features

1. Search By
   a. You can search by first name, last name, last four digits of SSN, and/or date of birth.
2. Sorting Columns
   a. Sort Columns by clicking on the Column header.
   b. Columns can be sorted by descending or ascending order

Overview of the Employee Enrollment Report

SF MRA Resources for Employees

The following are materials that you can use to help your employees learn about their SF City Option benefit:

1. Give **Welcome to SF City Option** to new employees who are eligible for future SF City Option contributions

   English | **Spanish** | **Chinese** | **Tagalog**

2. Provide the **Health Care Payment Confirmation Notice** after you make the first contribution on their behalf.

English | **Spanish** | **Chinese** | **Tagalog**

3. Send the **New Contribution Flyer** to employees after every payment made on their behalf.

   English

SF City Option mails a welcome package 1-3 weeks after the first payment for the employee clears.

The employees that need to enroll might have not received a prompt or forgotten to enroll. As the employer you are a credible source of information to your employees, and it is best if employees receive encouragement from you to submit an SF MRA Enrollment Form. Employees can submit their enrollment form online, by mail, or fax.

Online SF MRA Enrollment Form

English | **Spanish** | **Chinese** | **Tagalog**

Printable SF MRA Enrollment Form

English | **Spanish** | **Chinese** | **Tagalog**

If you need help with downloading this report, messaging to your employees, or have questions, please contact us at (415) 615-4492 or **employerservices@sfcityoption.org**

Appendix:

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

How to Format Your CSV 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 **Email**
   In cell N1, type **ContributionAmount**

How to Format Social Security Numbers for Leading Zeros
Highlight column A. Right click and Select **'Format Cells'**. In **'Number'** tab, select **'Custom'** as the Category. In **'Type'** field, replace "General" and enter 000000000 (i.e., 9 zeros). Click Ok.
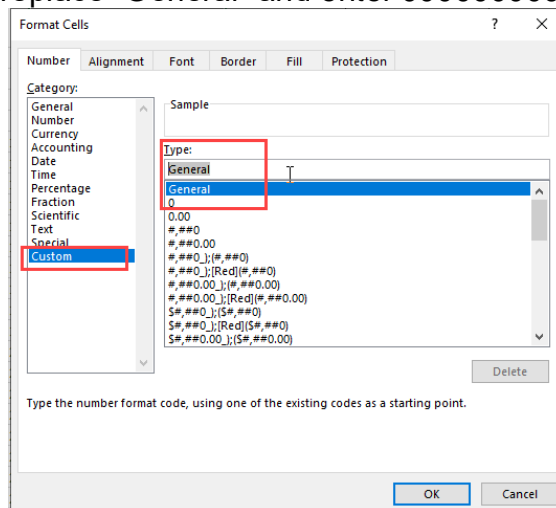
➔ Note: If you do not use custom formatting, Social Security numbers with leading zeroes will not display properly in the Employer Portal and you will encounter errors during the import process.

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.

Column Name	Description	Formatted Example	Min/Max Field Length	Required Field?
SSN	Social security number	123456789	9/9	Required
DOB	Birth date	02/14/1970	10/10	Required
FirstName	First name	Randall	1/50	Required
MI	Middle initial	S	0/1	Optional
LastName	Last name	Taylor	1/50	Required
Address1	Personal address line 1	201 First Street	1/255	Required
Address2	Personal address line 2	Apt 3	0/255	Optional
City	Personal city	San Francisco	1/50	Required
State	Personal state (abbreviation)	CA	2/2	Required
ZIP	Personal zip code	94102	5/5	Required
PrimaryPhone	Personal primary phone number	4155552000	10/10	Required
AlternatePhone	Personal alternate phone number	4155551234	0/10	Optional
Email	Email. Must have "@" and "."	Mickey@disney.com	2/255	Optional
ContributionAmount	The amount contributed for this employee (must be greater than $0.00)	123.45	2/8	Required

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	AlternatePhor	Email	ContributionAmount
2	123456789	1/1/1971	Mickey		Mouse	50 Beale St		San Francisco	CA	94105	5555555555		Mickey@disney.com	750.20
3	012345678	2/2/1972	Winnie	T	Pooh	7 Spring St		San Francisco	CA	94104	4155555555		Winnie@disney.com	1689.90
4														

Important notes

- Do not include employees receiving a contribution of $0.00.

- Do not include employees who you do not want to receive **SF MRA** through SF City Option.

- **Middle Initial** (MI), **Address2**, **Alternate Phone, and Email** are optional fields for each employee row, but all four 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.
  - 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.
- Do not include commas in any of the CSV file cells.

How to Save your CVS 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.
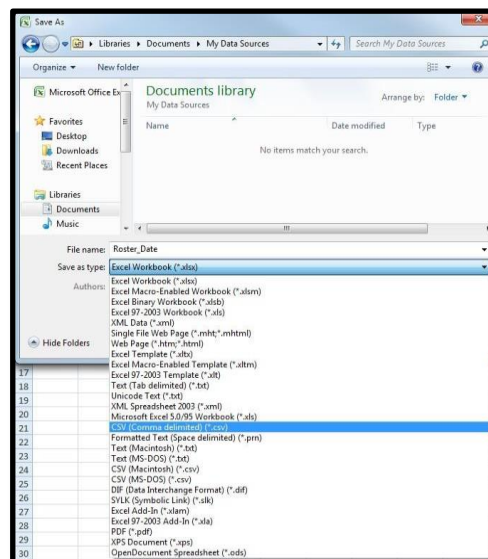
→ Note: We recommend not opening your saved file. If you open the CSV file, it may not look like the original Excel spreadsheet you created. Do not be alarmed. If you followed these instructions, the file will import properly.

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