



SFCityOption

THE EMPLOYER'S HEALTH CARE CHOICE

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) or comply with the [Healthy Airport Ordinance](#) (HAO).

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 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 HAO to 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>.

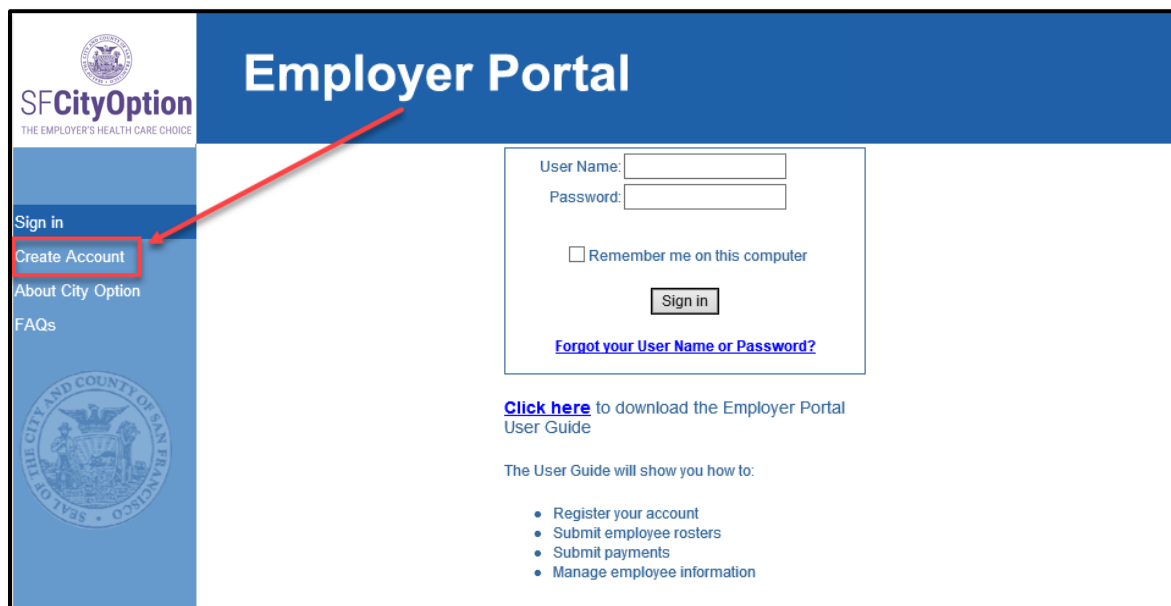
If you have questions about the Healthy Airport Ordinance, please contact the San Francisco Office of Labor Standards Enforcement at 1(415)554-7903 or hcao@sfgov.org, or visit their website at <https://sf.gov/information/healthy-airport-ordinance>.

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.



Employer Portal

Sign in
Create Account
About City Option
FAQs

User Name:
Password:

☐ Remember me on this computer

[Forgot your User Name or Password?](#)


[Click here](#) to download the Employer Portal User Guide

The User Guide will show you how to:

- Register your account
- Submit employee rosters
- Submit payments
- Manage employee information

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.



Employer Portal

[Sign in](#)
[Create Account](#)
[About City Option](#)
[FAQs](#)

Create new account

Please complete the form below to create an account. After you've created an account, you may add secondary users to this account by going to Manage Accounts > Manage Users.

First name

Last name

Username

Password [Show password](#)

Re-enter password

Business name

Doing business as

Address line 1

Address line 2

ZIP/City/State

Primary phone Alt. Phone

Primary phone Ext. Alt. Phone Ext.

Tax id number(TIN) E-mail

Industry classification

Company size

Tax status


Terms and Conditions

Effective Date: October 12, 2016

The following are the terms and conditions ("Terms and Conditions") of a legal agreement ("Agreement") between you and San Francisco Health Plan ("SFHP"), the administrator of the San Francisco City Option Program, relating to the use of the San Francisco City Option Employer Portal website ("Employer Portal") and services of the San Francisco City Option Program. For purposes of the Terms and Conditions, the terms "we," "us,"

☐ I agree to the [Terms and Conditions](#)

☐ I'm not a robot



reCAPTCHA
Privacy - Terms

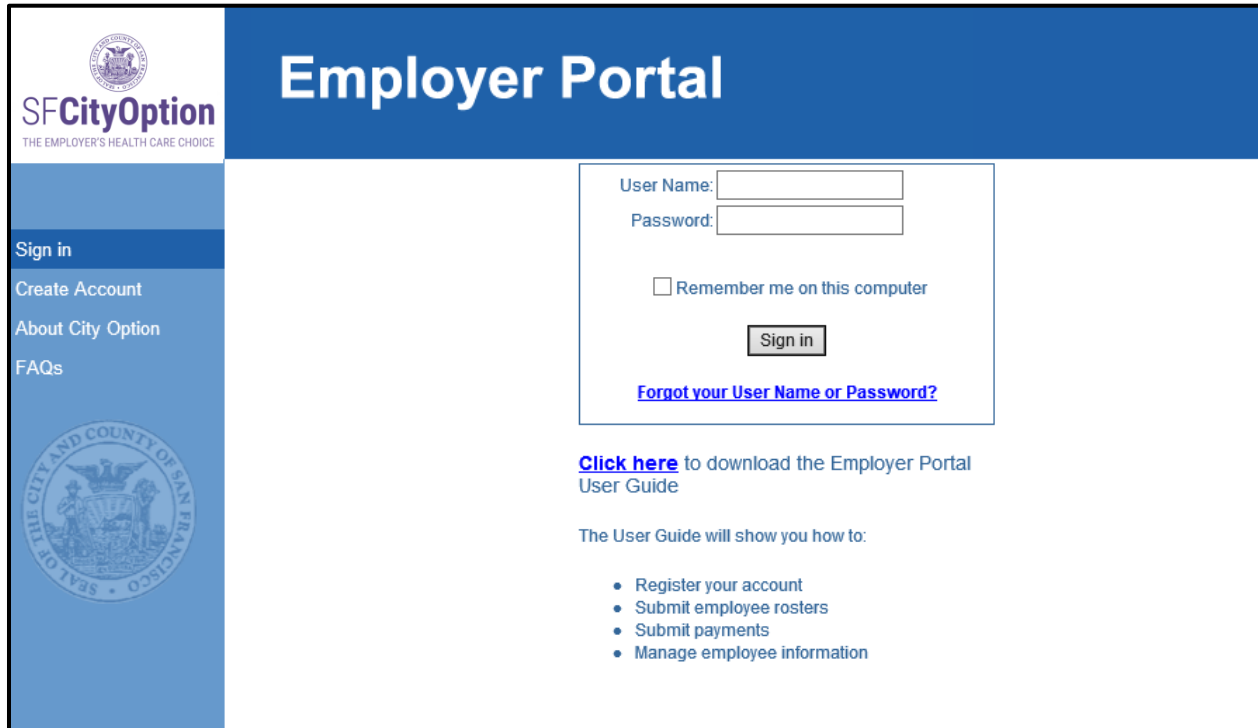
[Create account](#)

✉ **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

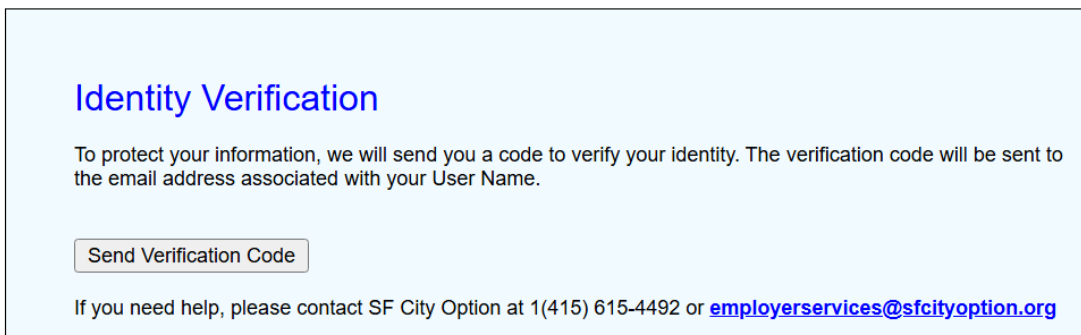
Once your account has been created, return to the Employer Portal home page at <https://employerportal.healthysanfrancisco.org> and enter your user name and password to sign in to your account.



The screenshot shows the Employer Portal login page. On the left is a blue sidebar with the SF City Option logo and navigation links: Sign in, Create Account, About City Option, and FAQs. Below these links is a large circular seal of the City and County of San Francisco. The main content area has a blue header with the text "Employer Portal". Below the header is a white box containing the login form. The form has fields for "User Name:" and "Password:", a checkbox for "Remember me on this computer", a "Sign in" button, and a link for "Forgot your User Name or Password?". Below the login box, there is a link to "Click here to download the Employer Portal User Guide" and a list of topics the User Guide covers: Register your account, Submit employee rosters, Submit payments, and Manage employee information.

Upon entering your username and password, you will be directed to the Identity Verification page for added security. Follow the instructions below to verify your identity:

Send Code: Click **"Send Verification Code."** A code will be sent to your registered email.



The screenshot shows the Identity Verification page. It has a light blue background. At the top, the title "Identity Verification" is in blue. Below the title, a paragraph states: "To protect your information, we will send you a code to verify your identity. The verification code will be sent to the email address associated with your User Name." Below this text is a button labeled "Send Verification Code". At the bottom, a paragraph says: "If you need help, please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org".

Enter Code: Check your email. Enter the code found in your email in the “**Enter Verification Code**” field and click “**Submit.**”

Identity Verification

Verification code has been sent. Please copy code in box below.

Enter Verification Code:

[Send New Code](#)

If you need help, please contact SF City Option at 1(415) 615-4492 or employerservices@sfcityoption.org

✉ **Didn't Get the Code?**

Click “Send New Code” if the code expired or wasn't received. Still need help? Contact SF City Option at (415) 615-4492 or employerservices@sfcityoption.org

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.

Forgot Your User Name or Password?

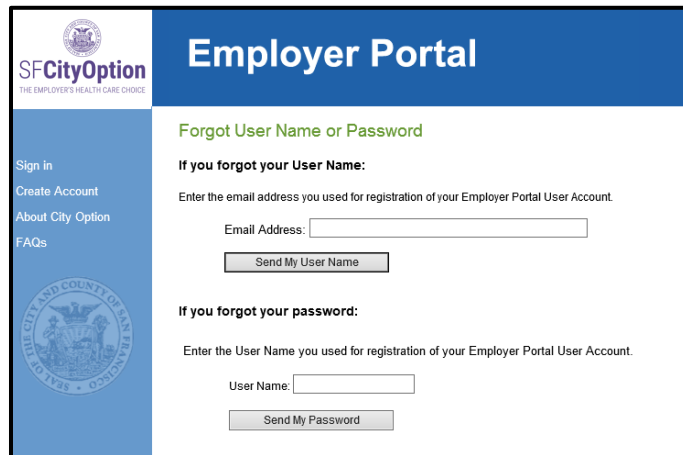
If you forgot your user name or password, select the **'Forgot your user name or password?'** link on the Employer Portal home page.

- 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 username associated with your user account and click **'Send My Password.'**

✉ **Check Your Email.** If the username you provided is in our system, an email with a temporary password will be sent to the email address associated with the username. Once you have logged in with your username 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.



The screenshot shows the 'Employer Portal' page with a blue header. On the left is a navigation menu with links: Sign In, Create Account, About City Option, and FAQs. Below the menu is the San Francisco City and County Seal. The main content area has a green heading 'Forgot User Name or Password'. It contains two sections: 'If you forgot your User Name:' with a text input for 'Email Address' and a 'Send My User Name' button; and 'If you forgot your password:' with a text input for 'User Name' and a 'Send My Password' button.

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 **1(415) 615-4492** or **employerservices@sfcityoption.org** to have your password reset and be assigned a temporary password.

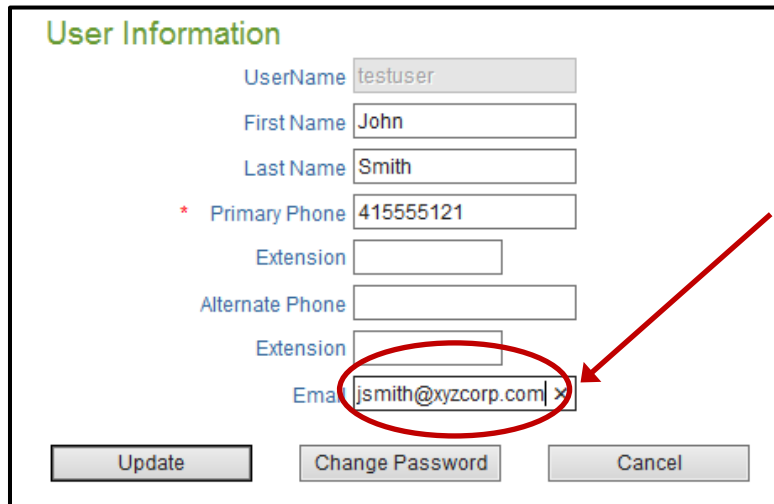
To change your temporary password after you log in to your account: select the **'Manage Account'** menu option, click on the **'Manage Users'** tab (if you are a primary user), and edit your account with a new password. Passwords expire after 90 days for security reasons and must meet the password complex requirements.

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.



User Information

UserName

First Name


Last Name

* Primary Phone

Extension

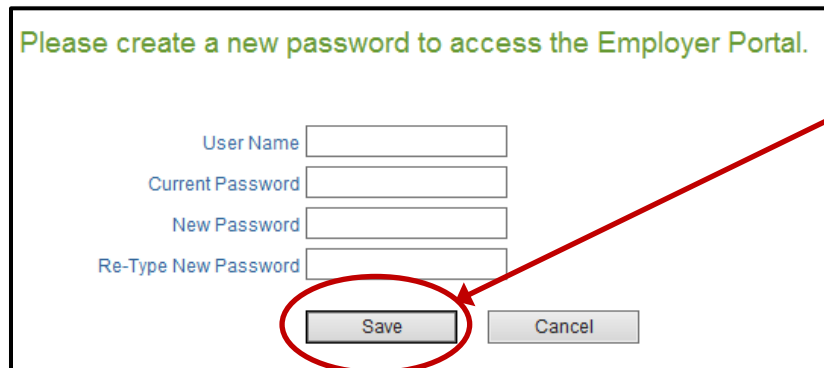
Alternate Phone

Extension

Email 

A red circle highlights the 'Change Password' button, and a red arrow points to it from the right.

2. Type User Name, current password, and new password. Click on the **'Save'** button.



Please create a new password to access the Employer Portal.

User Name

Current Password

New Password

Re-Type New Password

A red circle highlights the 'Save' button, and a red arrow points to it from the right.

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.

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 health care benefits.
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 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 health care benefits.
Alternate Phone	Optional.
Does this employee have other coverage?	<p>Required.</p> <p>This question asks whether the employee has health insurance from <u>ANY</u> source. This could be health insurance provided by your company or another source. Acceptable answers are:</p> <ul style="list-style-type: none"> • Yes • No • Unknown* <p>Health insurance includes:</p> <ul style="list-style-type: none"> • 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) <p>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.</p> <p><i>*Use 'Unknown' if you do not know whether the employee has health insurance from any source.</i></p>
Health care contribution amount for this employee	<p>Required.</p> <p>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 are not owed contributions.</p> <p>For information about the minimum health care expenditure rate:</p> <ul style="list-style-type: none"> • under the HCSO, visit the Office of Labor Standards Enforcement website at https://sfgov.org/olse/health-care-security-ordinance-hcso. • under the Healthy Airport Ordinance, visit their website at https://sfgov.org/olse/healthy-airport-ordinance-hcao-amendment

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:

<http://sfgov.org/olse/C-COVERED-EMPLOYEES> or review the Healthy Airport Ordinance at <https://sfgov.org/olse/healthy-airport-ordinance-hcao-amendment>

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:

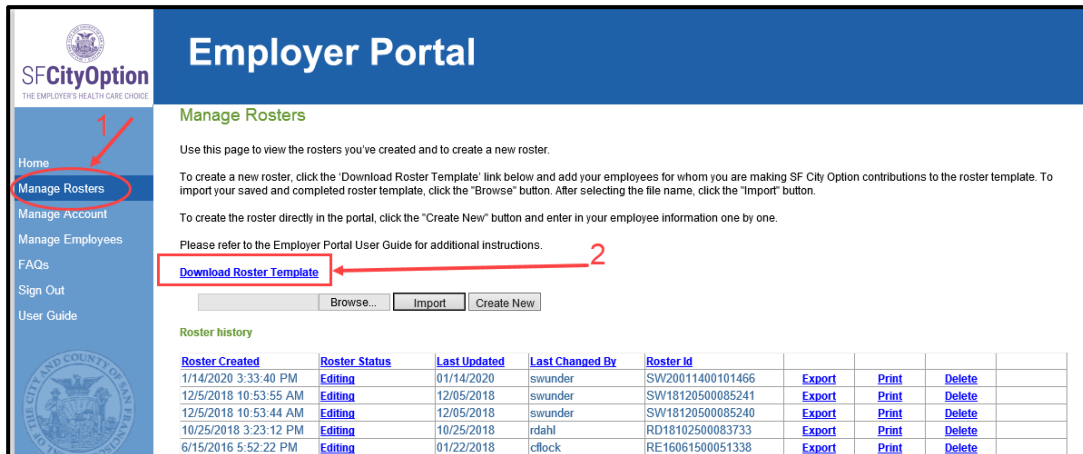
1. **Upload a roster** with employee information from an Excel spreadsheet saved as a CSV file. This is the preferred method by our Employers.
2. **Create a roster directly in the Employer Portal** by manually entering employee information

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. 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.



Employer Portal

Manage Rosters

Use this page to view the rosters you've created and 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](#)

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export	Print	Delete
1/14/2020 3:33:40 PM	Editing	01/14/2020	swunder	SW20011400101466	Export	Print	Delete
12/5/2018 10:53:55 AM	Editing	12/05/2018	swunder	SW18120500085241	Export	Print	Delete
12/5/2018 10:53:44 AM	Editing	12/05/2018	swunder	SW18120500085240	Export	Print	Delete
10/25/2018 3:23:12 PM	Editing	10/25/2018	rdahl	RD18102500083733	Export	Print	Delete
6/15/2016 5:52:22 PM	Editing	01/22/2018	clock	RE16061500051338	Export	Print	Delete



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:

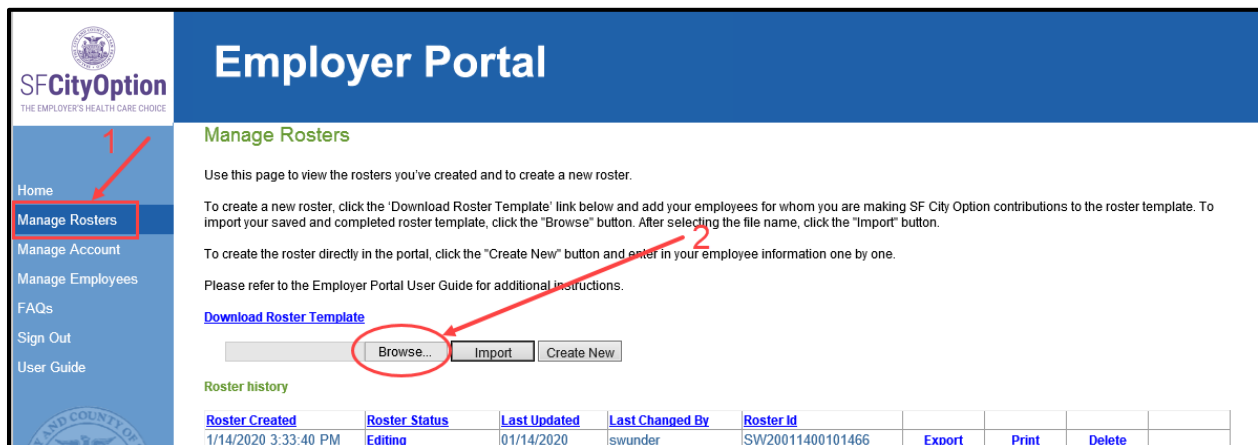
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	SSN	DOB	FirstName	MI	LastName	Address1	Address2	City	State	ZIP	PrimaryPhone	AlternatePhone	OtherHealthCoverage	ContributionAmount
2	123456789	1/1/1971	MICKEY		MOUSE	102 First St		Foster City	CA	94404	6509876543		NO	123.45
3	012345678	2/2/1972	WINNIE	T	POOH	103 First St		Anaheim	CA	801	9099871234	9093211234	YES	80

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. 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:

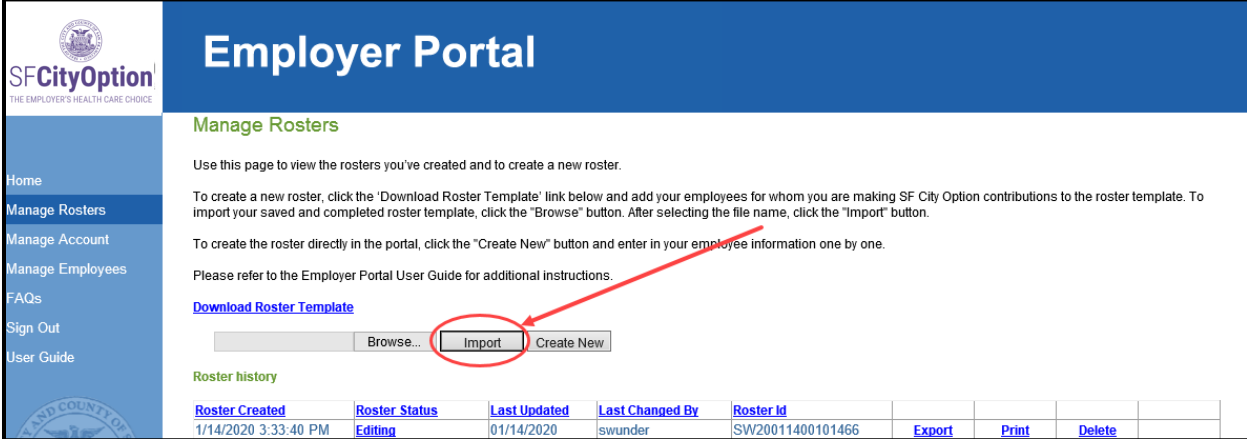
1. Select the '**Manage Rosters**' menu option.
2. Click on the '**Browse**' button.



3. Choose the CSV file to upload from your computer and click on the '**Open**' button.



- Click on the **'Import'** button on the Manage Rosters screen.



Employer Portal

Manage Rosters

Use this page to view the rosters you've created and 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](#)

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id				
1/14/2020 3:33:40 PM	Editing	01/14/2020	swunder	SW20011400101466	Export	Print	Delete	

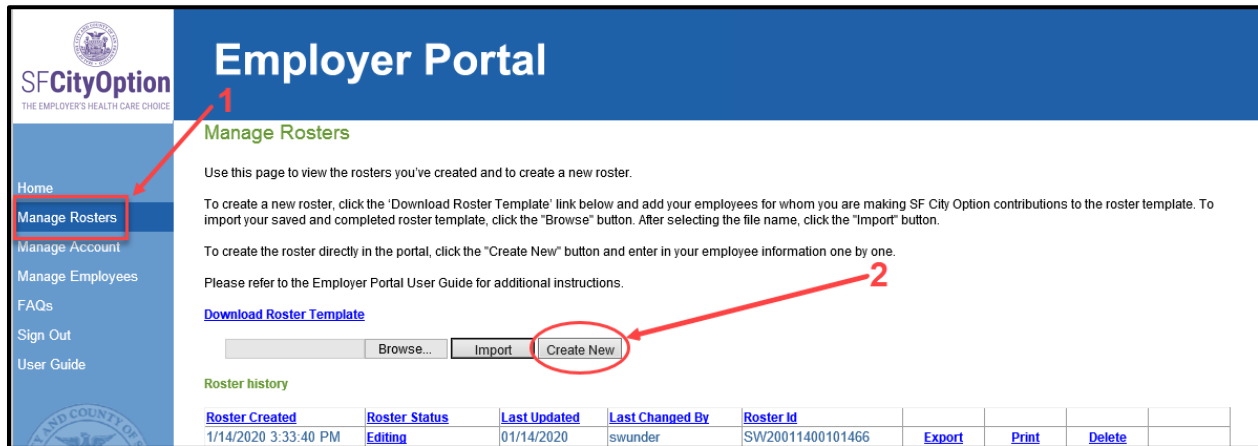
- After the file has been imported, you will be able to review the employee information in the Employer Portal and make changes before submitting your roster – go to [Errors and Warnings During Roster Review](#).

Method Two: Creating a Roster Directly in the Employer Portal

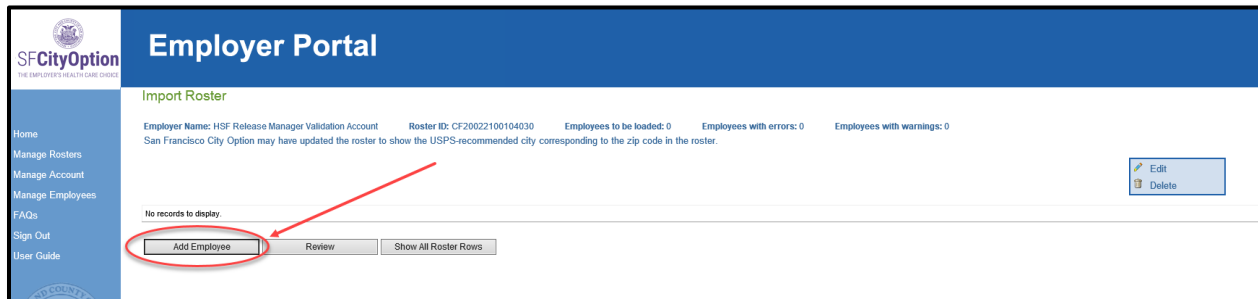
You can create a roster directly in the Employer Portal by entering employee information one employee at a time.

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).

Employer Portal

Employee Details

SSN

Date of birth

First name

MI

Last name

Address line 1

Address line 2

Zip

City

State

Primary phone

Alternate phone

Health care contribution amount for this employee [More info](#)

Does this employee have health insurance? [More info](#) ☐ Yes ☐ No ☐ Unknown

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: [REDACTED] Roster ID: RD1810250083733 Employees to be loaded: 1 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.

SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Has Other Coverage	Amount
1000 [REDACTED]	[REDACTED]	A [REDACTED]		B [REDACTED]	50 Beale Street		San Francisco	CA	94105	415 [REDACTED]		no	750.00

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.

Employer Portal

Import Roster

Employer Name: Roster ID: Employees to be loaded: 2 **Employees with errors: 1** 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.

How to Fix Errors:

1. Fix any errors by clicking on the "Error" link in the Status column. You will be directed to a page that identifies the error.
2. If you have an "SSN Invalid" error, this means the SSN is not in the correct format of 9 numeric digits without dashes. Be aware that you need to custom format your file before importing so that SSNs starting with "0" (e.g. 012345678) are imported properly. Review Appendix A of the [Employer Portal User Guide](#) for instructions on how to format your file, then make changes and import a new file.

After all errors are corrected, click on the "Review" button to go to the next step. If you need help with this roster, call (415) 615-4492.

Edit
Delete

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**.

	SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Has Other Coverage	Amount	Status
	xxxx9242	05/06						Vallejo	CA	94591			No	40.40	Error
	xxxx4553	03/07		I			Apt 306	Burlingame	CA	94010			No	939.81	Error
	xxxx4553	07/07		P				San Francisco	CA	94112			No	155.44	Error
	xxxx4553	07/07						San Francisco	CA	94122			No	975.93	Error
	xxxx4186	08/07		J				San Francisco	CA	94134			No	1054.72	Warning
	xxxx9211	08/07						SAN FRANCISCO	CA	94132			No	162.83	Warning
	xxxx4781	08/07		J				San Francisco	CA	94121			No	159.74	Warning

Add Employee Review Show All Roster Rows

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.

Import Roster

Employer Name: Test Company Roster ID: DA1907020093850 Employees to be loaded: 3 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	Has Other Coverage	Amount	Status
	xxxx4321	12/12/1963	David		Watkins	7 Spring Street	Unit A	San Francisco	CA	94104	9100400621	9512186578	Yes	24.48	
	xxxx5555	5/5/1984	Albert		Nelson	1500 Ellis Street	Unit 157	Concord	CA	94520	4154655545		Unknown	1121.98	
	xxxx9987	01/01/1993	Emma		Douglas	50 Beale Street	9th Floor	San Francisco	CA	94105	4156154492		no	1210.67	

Add Employee Review Show All Roster Rows

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: Formatting Error

SSN xxxxx-1212

Date of birth 01011970 ✖

DOB must be in mm/dd/yyyy format (e.g. 03/06/1980).

If the employee is younger than 13 or older than 100 years old, call the City Option Program at (415) 615-4492.

9 digits only, no dashes

mm/dd/yyyy format

Optional

Optional

10 digits only, no dashes or parentheses

Optional: 10 digits only, no dashes or parentheses

Exclude the dollar sign (\$)

First name

Joe

MI

Last name

Crew

Address line 1

1111 Five St

Address line 2

Zip

90605

City

Whittier

State

CA

Primary phone

5625551312

Alternate phone

Health care contribution amount for this employee

More info

1000

Does this employee have health insurance?

More info

☒ Yes

☐ No

☐ Unknown

Save

Cancel

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**.

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.

Verify Employee SSN

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: [REDACTED] 95	SSN: [REDACTED] 94
Date of Birth: 03/31 [REDACTED]	Date of Birth: 03/31 [REDACTED]
First Name: J [REDACTED]	First Name: J [REDACTED]
Last Name: Smith	LastName: Smith

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: <input type="text"/>	SSN: <input type="text"/>
Date of Birth: <input type="text"/>	Date of Birth: <input type="text"/>
First Name: Jacquelin	First Name: Jacqueline
Last Name: Smit	LastName: Smith

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: <input type="text"/> 94	SSN: <input type="text"/> 94
Date of Birth: 03/31/1990	Date of Birth: 03/31/1992
First Name: J <input type="text"/>	First Name: J <input type="text"/>
Last Name: Smith	LastName: Smith

Error type 9 – Email Invalid

While the Email Address field is optional, if an email is entered, it must contain a valid domain. The system will flag any email address with improper format or invalid email domain and will not allow the roster to be submitted until the error is corrected.

Upon clicking on the **'Error'** hyperlink, you will be sent to the edit page. Update the employee's email address to ensure it has a valid format and domain or remove it entirely, then click on the **'Save'** button.

Once all errors have been corrected, you can proceed with submitting the roster.

ERROR: Formatting Error

SSN xxxxx:

Date of birth

First name

MI

Last name

Address line 1

Address line 2

Zip

City

State

Primary phone

Alternate phone

Health care contribution amount for this employee [More info](#)

Email

Please enter a valid email address.

- Must have an '@' and '.'
- Cannot be an invalid domain name



You will receive an error when you try to submit a roster with the above invalid special characters (both, if submitted manually or through the roster template).

- If the error is on the First Name field, the Employee Details page highlights the First Name field error in Orange with the error message “**First Name Invalid. No Special Characters allowed.**”
- Upon clicking on the ‘Error’ hyperlink, you will be sent to a page to edit. Make the changes to the employee’s First Name, remove the invalid Special Character and click on the ‘Save’ button.

If the error is on the Last Name field, the Employee Details page highlights the Last Name field error in Orange with the error message “**Last Name Invalid. No Special Characters allowed.**”

- Upon clicking on the 'Error' hyperlink, you will be sent to a page to edit. Make the changes to the employees' Last

Page 24 of 56

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:

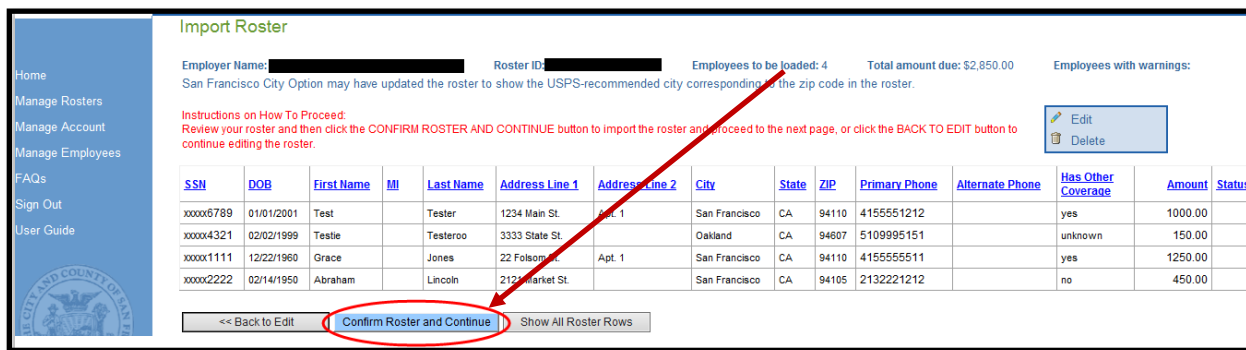
- Notification that the address or phone number you are attempting to submit in the current roster is different from the address or phone number already in the SF City Option system (based on what was submitted in a past roster for this employee or provided to Customer Service by the employee).

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.



Import Roster

Employer Name: [REDACTED] Roster ID: [REDACTED] Employees to be loaded: 4 Total amount due: \$2,850.00 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.

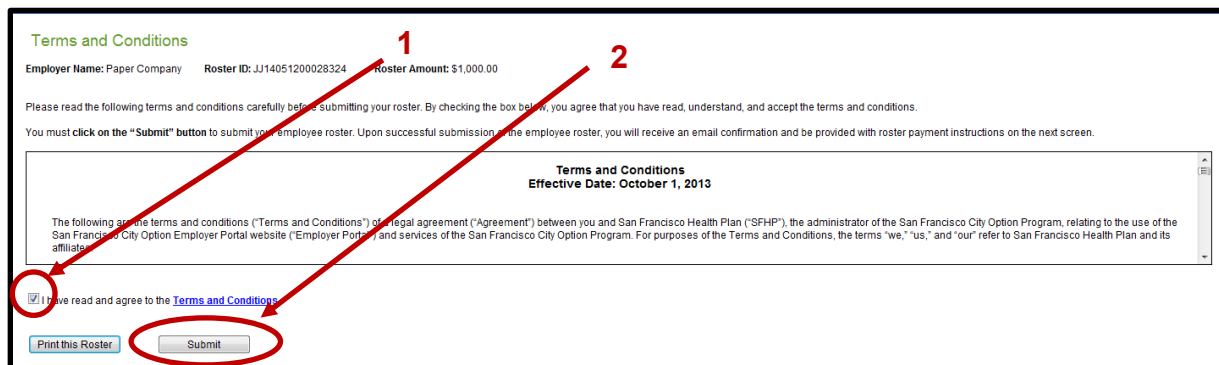
Instructions on How To Proceed:
Review your roster and then click the **CONFIRM ROSTER AND CONTINUE** button to import the roster and proceed to the next page, or click the **BACK TO EDIT** button to continue editing the roster.

SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Has Other Coverage	Amount	Status
xxxxxx6789	01/01/2001	Test		Tester	1234 Main St.	Apt. 1	San Francisco	CA	94110	4155551212		yes	1000.00	
xxxxxx4321	02/02/1999	Testle		Testeroo	3333 State St.		Oakland	CA	94607	5109995151		unknown	150.00	
xxxxxx1111	12/22/1960	Grace		Jones	22 Folsom St.	Apt. 1	San Francisco	CA	94110	4155555511		yes	1250.00	
xxxxxx2222	02/14/1950	Abraham		Lincoln	2121 Market St.		San Francisco	CA	94105	2132221212		no	450.00	

<< Back to Edit **Confirm Roster and Continue** Show All Roster Rows

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.



Terms and Conditions

Employer Name: Paper Company Roster ID: JJ14051200028324 Roster Amount: \$1,000.00

Please read the following terms and conditions carefully before submitting your roster. By checking the box below, you agree that you have read, understand, and accept the terms and conditions.

You must click on the **"Submit"** button to submit your employee roster. Upon successful submission of the employee roster, you will receive an email confirmation and be provided with roster payment instructions on the next screen.

Terms and Conditions
Effective Date: October 1, 2013

The following are the terms and conditions ("Terms and Conditions") of the legal agreement ("Agreement") between you and San Francisco Health Plan ("SFHP"), the administrator of the San Francisco City Option Program, relating to the use of the San Francisco City Option Employer Portal website ("Employer Portal") and services of the San Francisco City Option Program. For purposes of the Terms and Conditions, the terms "we," "us," and "our" refer to San Francisco Health Plan and its affiliates.

☒ I have read and agree to the [Terms and Conditions](#)

Print this Roster **Submit**

✉ **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. For missed payments, only pay through SF City Option 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.

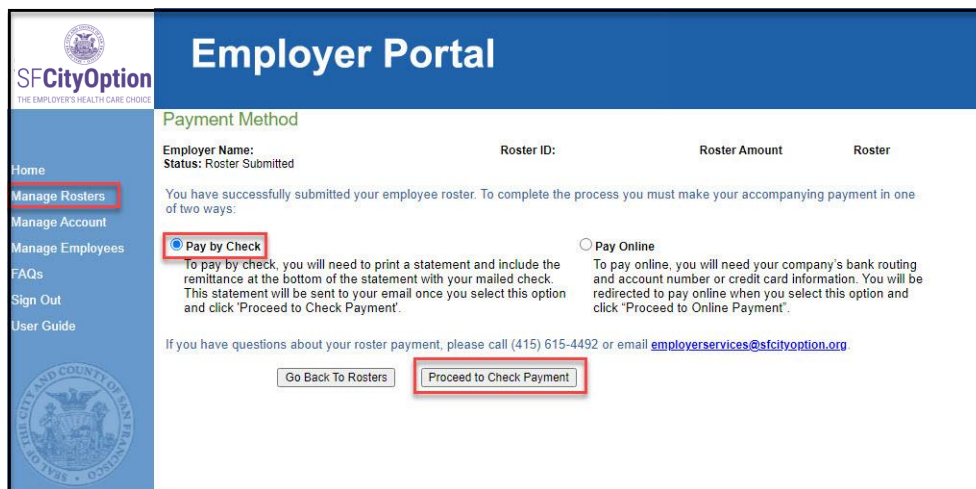
If you send payment and do not submit a roster within 30 calendar days of our receipt of your check, your check will be returned to you. You will need to submit the roster and resend payment.

- ➔ 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.

There are two ways to make a payment:

1. Pay 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 sent to your email address associated with your Employer Portal account. Remove the Remittance Coupon at the bottom of the statement and mail it with your check.



Employer Portal

Payment Method

Employer Name: _____ Roster ID: _____ Roster Amount: _____ Roster: _____
 Status: Roster Submitted

You have successfully submitted your employee roster. To complete the process you must make your accompanying payment in one of two ways:

☒ **Pay by Check** ☐ **Pay Online**

To pay by check, you will need to print a statement and include the remittance at the bottom of the statement with your mailed check. This statement will be sent to your email once you select this option and click "Proceed to Check Payment".

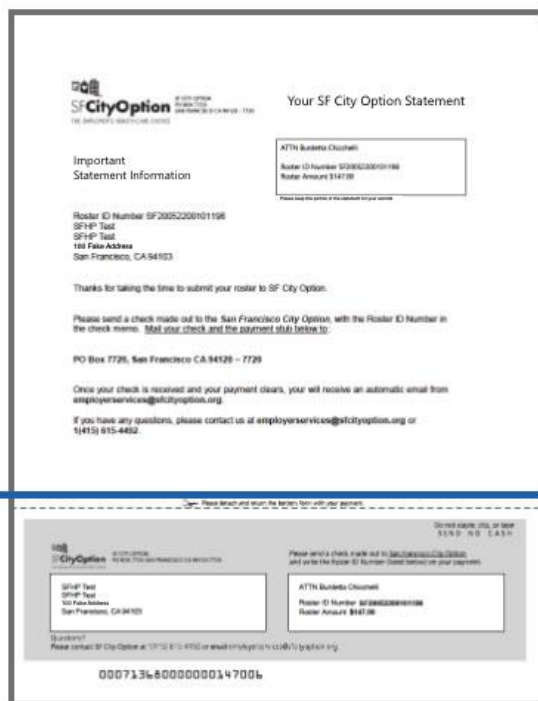
To pay online, you will need your company's bank routing and account number or credit card information. You will be redirected to pay online when you select this option and click "Proceed to Online Payment".

If you have questions about your roster payment, please call (415) 615-4492 or email employerservices@sfcityoption.org

[Go Back To Rosters](#) [Proceed to Check Payment](#)

Print the emailed SF City Option Statement and detach the Remittance Coupon 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.



**Follow instructions listed on statement.
Cut below the line and mail it with your check.**

Make check payable to: San Francisco City Option

If **you want to send payment via FedEx or UPS** use the following address:

City National Bank
 2490 Mariner Sq. Loop, Suite 250
 Alameda CA, 94501
 Attn: SF City Option Lockbox 7720

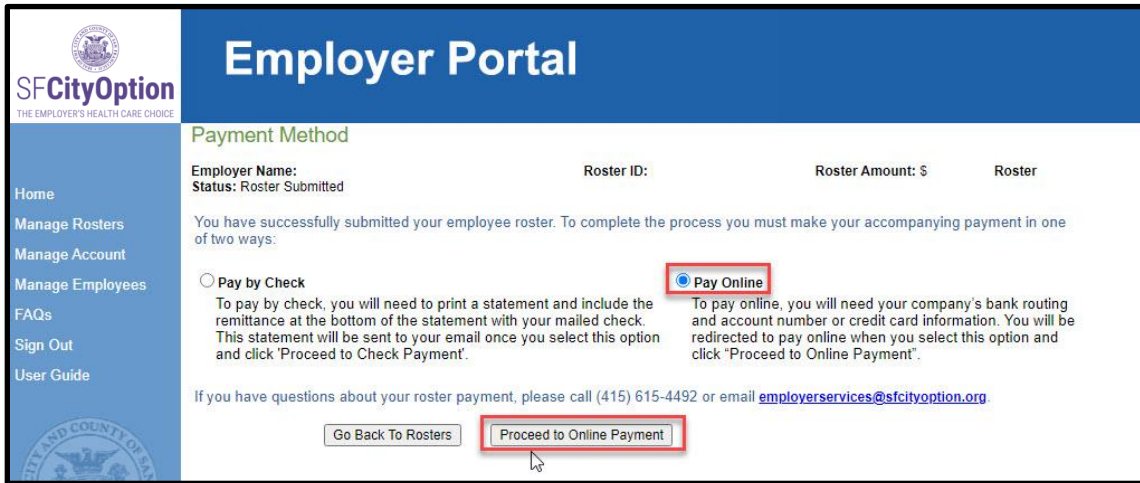
To mail via regular mail, use the following address:

San Francisco City Option
 PO Box 7720
 San Francisco, CA 94120-7720

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

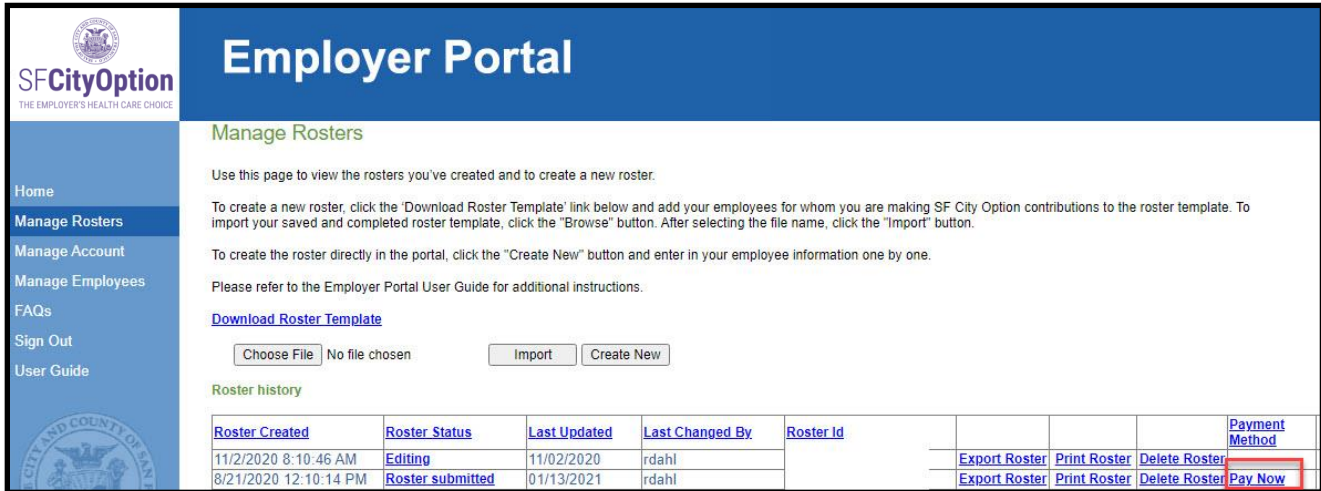
2. Making an Online Payment by either Electronic Funds Transfer (EFT E-Check) or Credit Card

After you submit your roster, select **“Pay Online”** and click on the **‘Proceed to Online Payment’** button to start the process.



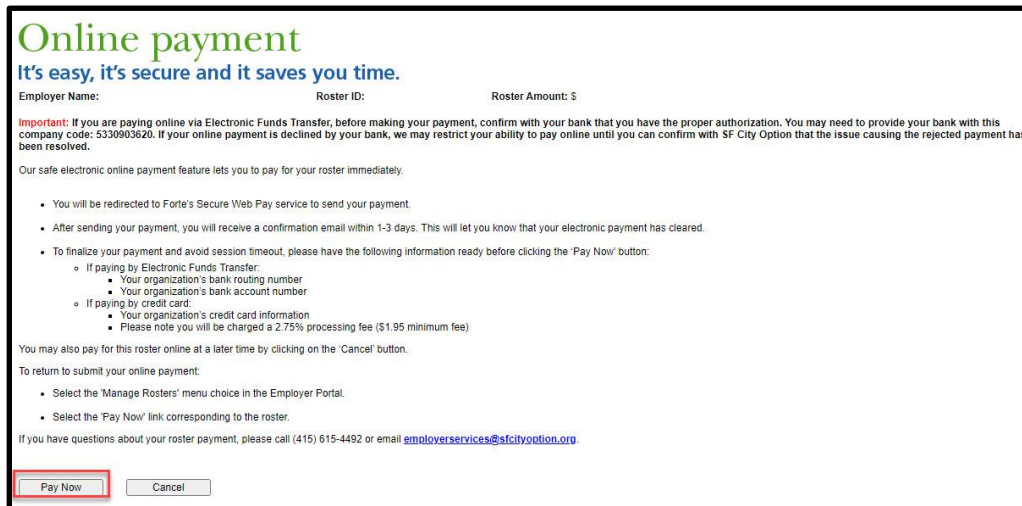
- ➔ Note: This is an electronic funds transfer (EFT) payment and not an ACH deposit. We do not accept payment by ACH deposit.
- ➔ Note: If your bank requires a bank security form, send us the form to complete prior to making your online payment otherwise your payment may be declined. If you are unsure 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 \$2 million. If you need to make a payment greater than \$2 million, please mail a check. To arrange for the ability to make an online payment greater than \$2 million for a future roster, please contact SF City Option at **1(415) 615-4492** or **employerservices@sfcityoption.org**.
- ➔ Note: If paying by credit card, you will be charged a processing fee. We do not accept AMEX credit card payments.

If you do not want to complete your online payment, click on the **‘Cancel’** button. When you are ready to pay online, click on **Manage Rosters** in menu option and click on the **‘Pay Now’** link corresponding to the roster you want to pay.



Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Payment Method
11/2/2020 8:10:46 AM	Editing	11/02/2020	rdahl		Export Roster Print Roster Delete Roster
8/21/2020 12:10:14 PM	Roster submitted	01/13/2021	rdahl		Export Roster Print Roster Delete Roster Pay Now

You will need your company's bank account number and routing number or your organization's credit card information. Select the '**Pay Now**' button to be directed to Forte's Secure Web Pay. Online payment is a secure service.



Online payment
 It's easy, it's secure and it saves you time.

Employer Name: Roster ID: Roster Amount: \$

Important: If you are paying online via Electronic Funds Transfer, before making your payment, confirm with your bank that you have the proper authorization. You may need to provide your bank with this company code: 5330903620. If your online payment is declined by your bank, we may restrict your ability to pay online until you can confirm with SF City Option that the issue causing the rejected payment has been resolved.

Our safe electronic online payment feature lets you to pay for your roster immediately.

- You will be redirected to Forte's Secure Web Pay service to send your payment.
- After sending your payment, you will receive a confirmation email within 1-3 days. This will let you know that your electronic payment has cleared.
- To finalize your payment and avoid session timeout, please have the following information ready before clicking the 'Pay Now' button:
 - If paying by Electronic Funds Transfer:
 - Your organization's bank routing number
 - Your organization's bank account number
 - If paying by credit card:
 - Your organization's credit card information
 - Please note you will be charged a 2.75% processing fee (\$1.95 minimum fee)

You may also pay for this roster online at a later time by clicking on the 'Cancel' button.

To return to submit your online payment:

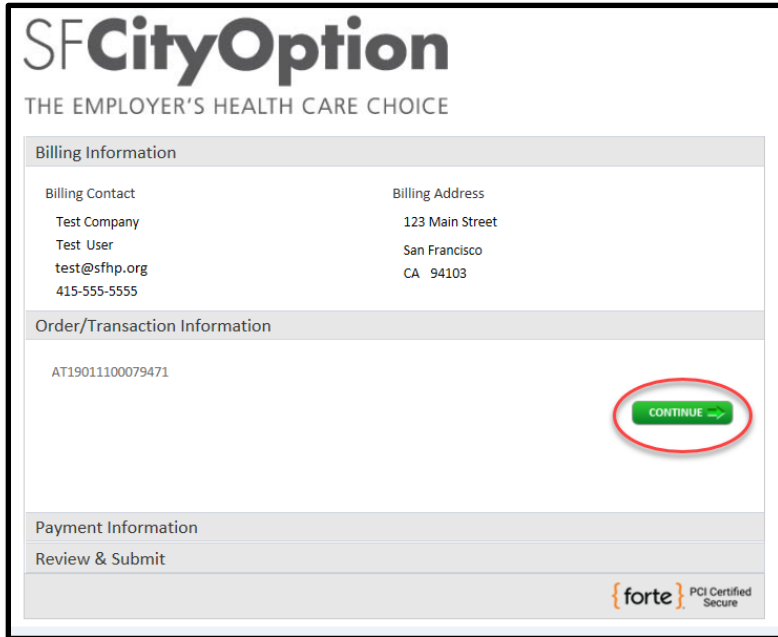
- Select the 'Manage Rosters' menu choice in the Employer Portal.
- Select the 'Pay Now' link corresponding to the roster.

If you have questions about your roster payment, please call (415) 615-4492 or email employerservices@sfcityoption.org.

Pay Now Cancel

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
THE EMPLOYER'S HEALTH CARE CHOICE

Billing Information	
Billing Contact	Billing Address
Test Company	123 Main Street
Test User	San Francisco
test@sfhp.org	CA 94103
415-555-5555	

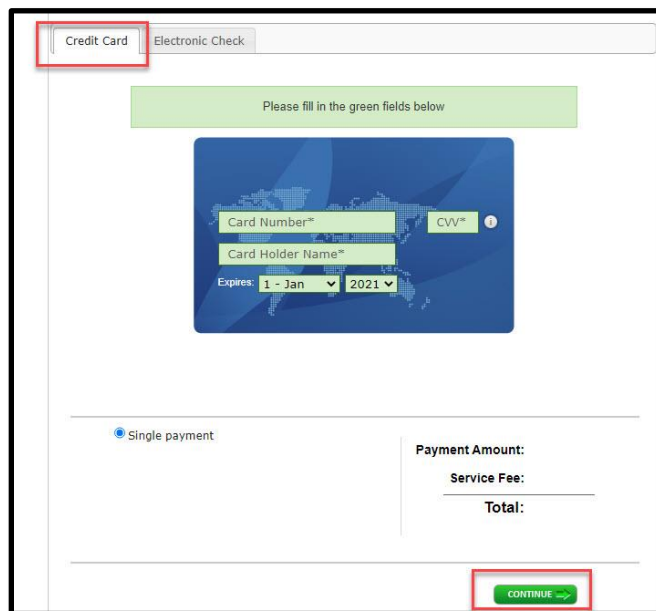
Order/Transaction Information
AT19011100079471

CONTINUE

Payment Information
Review & Submit

forte PCI Certified Secure

Select either credit card or Electronic check (Electronic Funds Transfer).



Credit Card | Electronic Check

Please fill in the green fields below

Card Number*

CVV*

Card Holder Name*

Expires: 1 - Jan 2021

☒ Single payment

Payment Amount:

Service Fee:

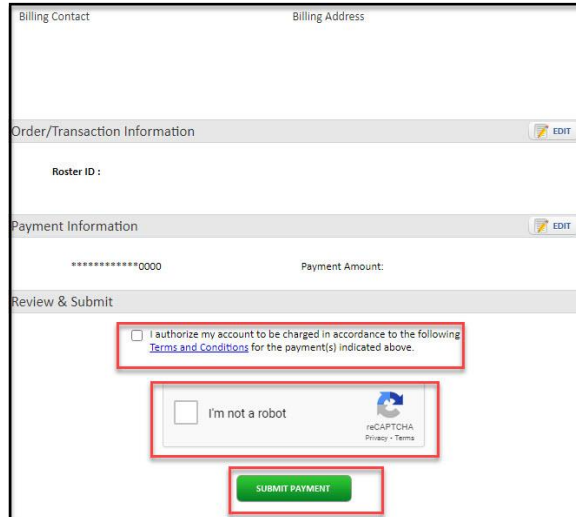
Total:

CONTINUE

➔ Note: Payment Amount field is locked and cannot be changed. This field is populated directly from the roster that you submitted.

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

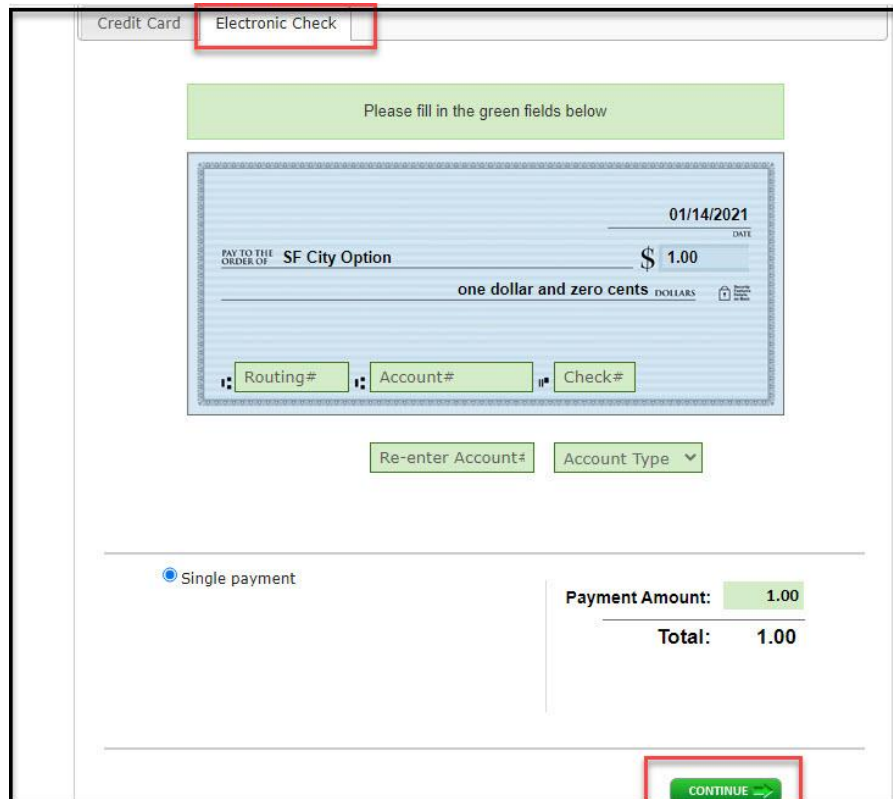
Check the box “I authorize my account to be charged in accordance to the following Terms and Conditions for the payment(s) indicated above.” Then check the box “I am not a robot,” select all images requested and click “Verify”. After that, click “Submit Payment”.



This screenshot shows the 'Review & Submit' section of the payment interface. The following elements are highlighted with red boxes:

- A checkbox for authorizing the account to be charged, with a link to 'Terms and Conditions'.
- A checkbox for 'I'm not a robot' next to a reCAPTCHA logo.
- A green 'SUBMIT PAYMENT' button.

If you pay by Electronic Funds Transfer, select “Electronic Check”.

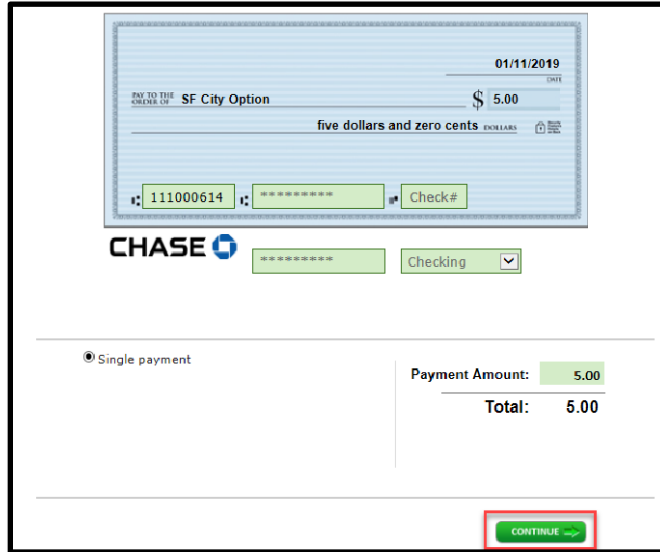


This screenshot shows the 'Electronic Check' payment page. The following elements are highlighted with red boxes:

- The 'Electronic Check' radio button in the payment method selection area.
- A green box containing the instruction: 'Please fill in the green fields below'.
- A simulated check image showing the payee as 'SF City Option' for the amount of '\$ 1.00' (one dollar and zero cents), dated '01/14/2021'.
- Input fields for 'Routing#', 'Account#', and 'Check#' on the check image.
- Input fields for 'Re-enter Account#' and 'Account Type' below the check image.
- The 'Single payment' radio button.
- The 'Payment Amount: 1.00' and 'Total: 1.00' summary.
- A green 'CONTINUE' button at the bottom right.

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.

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.



01/11/2019

PAY TO THE ORDER OF SF City Option \$ 5.00

five dollars and zero cents

111000614 ***** Check#

CHASE

***** Checking

Single payment

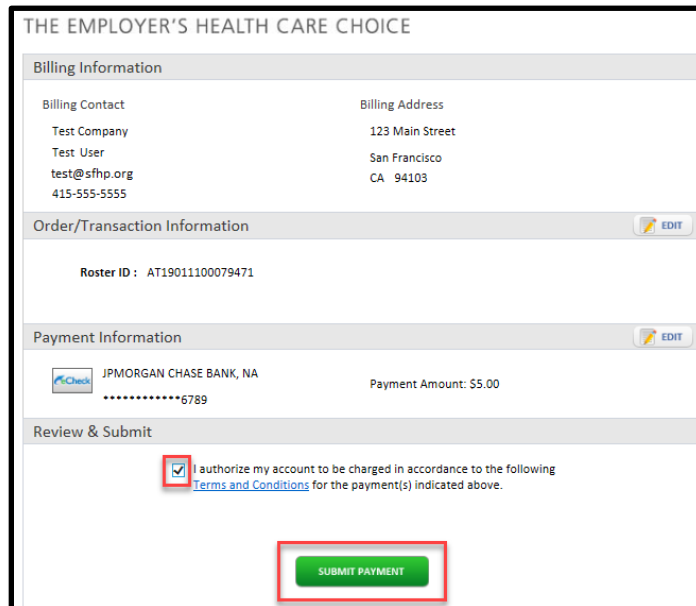
Payment Amount: 5.00

Total: 5.00

CONTINUE

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'.



THE EMPLOYER'S HEALTH CARE CHOICE

Billing Information

Billing Contact	Billing Address
Test Company	123 Main Street
Test User	San Francisco
test@sfhp.org	CA 94103
415-555-5555	

Order/Transaction Information

Roster ID : AT19011100079471

Payment Information

JPMORGAN CHASE BANK, NA Payment Amount: \$5.00

*****6789

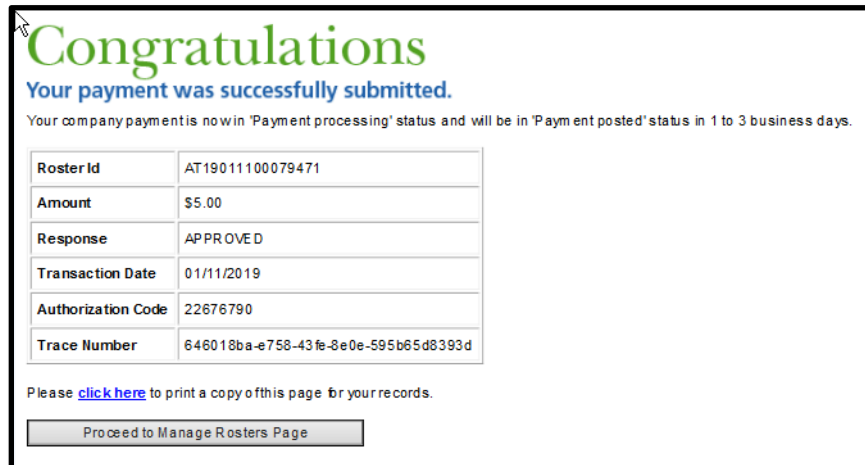
Review & Submit

☒ I authorize my account to be charged in accordance to the following [Terms and Conditions](#) for the payment(s) indicated above.

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.



Congratulations
Your payment was successfully submitted.

Your company payment is now in 'Payment processing' status and will be in 'Payment posted' status in 1 to 3 business days.

Roster Id	AT19011100079471
Amount	\$5.00
Response	APPROVED
Transaction Date	01/11/2019
Authorization Code	22676790
Trace Number	646018ba-e758-43fe-8e0e-595b65d8393d

Please [click here](#) to print a copy of this page for your records.

[Proceed to Manage Rosters Page](#)

- ➔ **IMPORTANT:** To avoid making a duplicate payment, DO NOT use your back-button browser AFTER you have clicked on the ‘Submit’ button.
- ➔ Duplicate payments made within 5 minutes of the previous transaction are automatically declined and will trigger an error code.
- ➔ If you believe a duplicate payment was processed, please contact SF City Option as soon as possible.

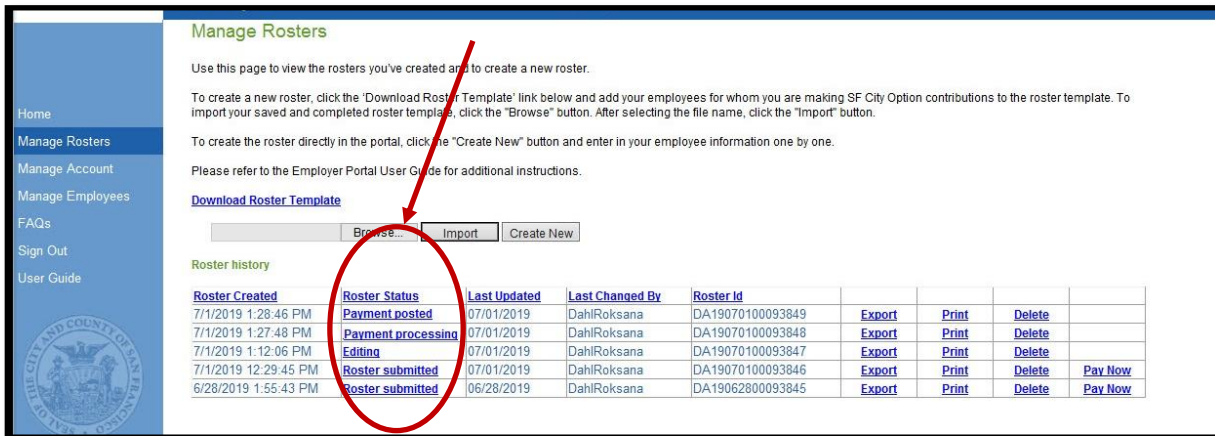
If you have questions about online payments to SF City Option, please contact us at **1(415) 615-4492** or **employerservices@sfcityoption.org**.

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 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.



Manage Rosters

Use this page to view the rosters you've created and 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.

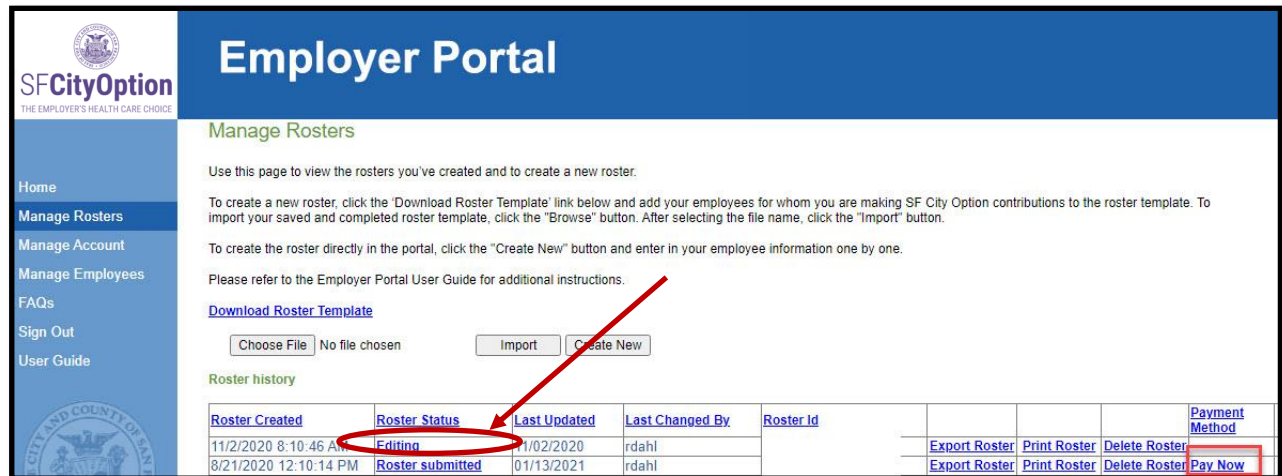
[Download Roster Template](#)

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id				
7/1/2019 1:28:46 PM	Payment posted	07/01/2019	DahlRoksana	DA19070100093849	Export	Print	Delete	
7/1/2019 1:27:48 PM	Payment processing	07/01/2019	DahlRoksana	DA19070100093848	Export	Print	Delete	
7/1/2019 1:12:06 PM	Editing	07/01/2019	DahlRoksana	DA19070100093847	Export	Print	Delete	
7/1/2019 12:29:45 PM	Roster submitted	07/01/2019	DahlRoksana	DA19070100093846	Export	Print	Delete	Pay Now
6/28/2019 1:55:43 PM	Roster submitted	06/28/2019	DahlRoksana	DA19062800093845	Export	Print	Delete	Pay Now

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.



Employer Portal

Manage Rosters

Use this page to view the rosters you've created and 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](#)

No file chosen

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export Roster	Print Roster	Delete Roster	Payment Method
11/2/2020 8:10:46 AM	Editing	1/02/2020	rdahl		Export Roster	Print Roster	Delete Roster	Pay Now
8/21/2020 12:10:14 PM	Roster submitted	01/13/2021	rdahl		Export Roster	Print Roster	Delete Roster	Pay Now

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.



Import Roster

Employer Name: [REDACTED] Roster ID: [REDACTED] Employees to be loaded: 4 Employees with errors: 0 Employees with warnings: 0

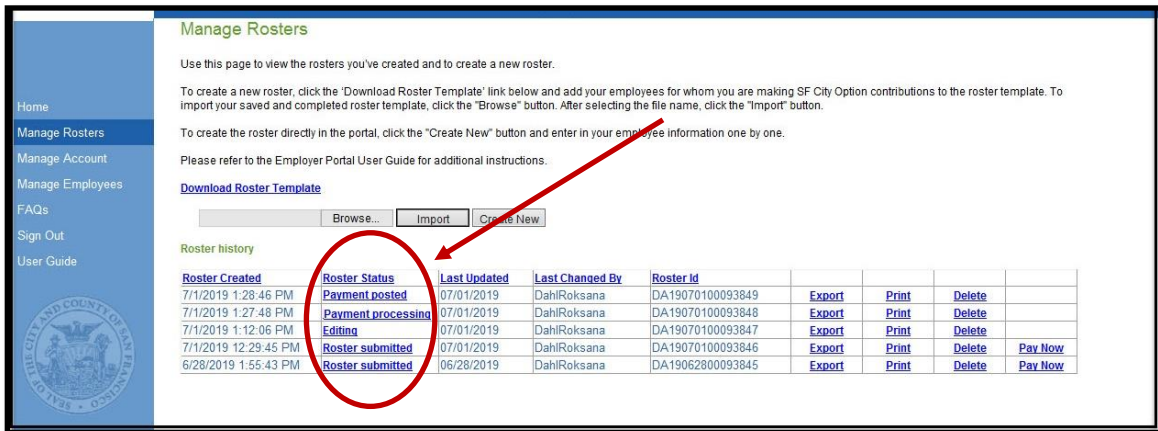
San Francisco City Option may have updated the roster to show the USPS-recommended city corresponding to the zip code in the roster.

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.

	SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Has Other Coverage	Amount	Status
	xxxxx6789	01/01/2001	Test		Testor	1234 Main St.	Apt. 1	San Francisco	CA	94110	4155551212		yes	1000.00	
	xxxxx4321	02/02/1999	Testie		Testeroo	3333 State St.		Oakland	CA	94607	5109995151		unknown	150.00	
	xxxxx1111	12/22/1960	Grace		Jones	22 Folsom St.	Apt. 1	San Francisco	CA	94110	4155555511		yes	1250.00	
	xxxxx2222	02/14/1950	Abraham		Lincoln	2121 Market St.		San Francisco	CA	94105	2132221212		no	450.00	

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.



Manage Rosters

Use this page to view the rosters you've created and 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](#)

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export	Print	Delete	
7/1/2019 1:28:46 PM	Payment Posted	07/01/2019	DahlRoksana	DA19070100093849	Export	Print	Delete	
7/1/2019 1:27:48 PM	Payment processing	07/01/2019	DahlRoksana	DA19070100093848	Export	Print	Delete	
7/1/2019 1:12:06 PM	Editing	07/01/2019	DahlRoksana	DA19070100093847	Export	Print	Delete	
7/1/2019 12:29:45 PM	Roster submitted	07/01/2019	DahlRoksana	DA19070100093846	Export	Print	Delete	Pay Now
6/28/2019 1:55:43 PM	Roster submitted	06/28/2019	DahlRoksana	DA19062800093845	Export	Print	Delete	Pay Now

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.

View Roster

Information shown reflects current information in the City Option Program 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.

Employer Name: [REDACTED] Roster ID: [REDACTED] Roster Status: Payment Posted Roster Imported: 07/22/2013 Roster Submitted: 07/22/2013

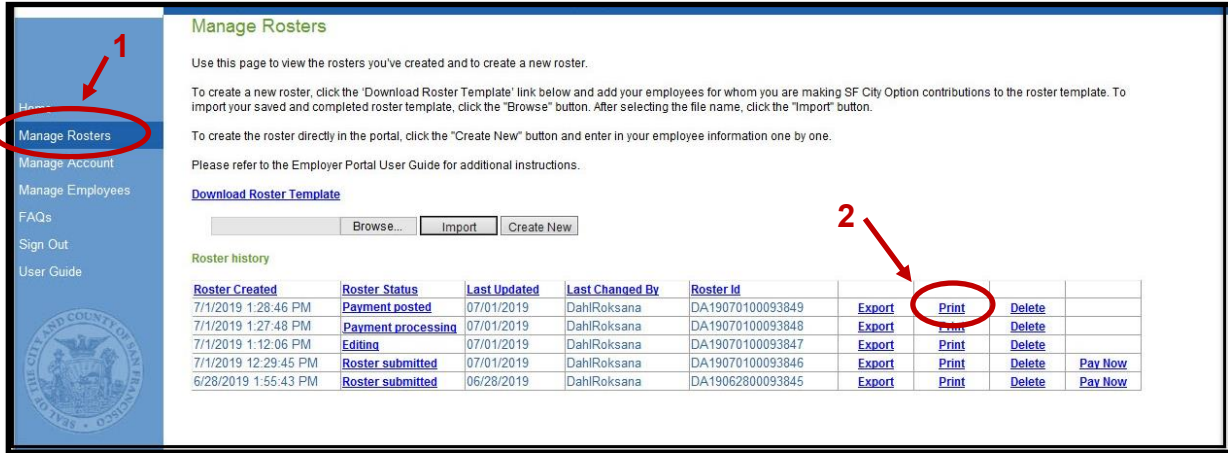
SUMMARY
Total Employees: 2
Total Amount Due: \$2,175.70

SSN	DOB	First Name	MI	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Primary Phone	Alternate Phone	Has Other Coverage	Amount	Program Assignment
xxxxx7564	[REDACTED]	S	[REDACTED]	K	[REDACTED]		Concord	CA	94519	510 [REDACTED]	562 [REDACTED]	Yes	\$1,113.64	SF MRA
xxxxx8176	[REDACTED]	K	[REDACTED]	V	[REDACTED]		Newark	CA	94560	510 [REDACTED]		No	\$1,062.06	SF MRA

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.



Manage Rosters

Use this page to view the rosters you've created and 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](#)

Roster history

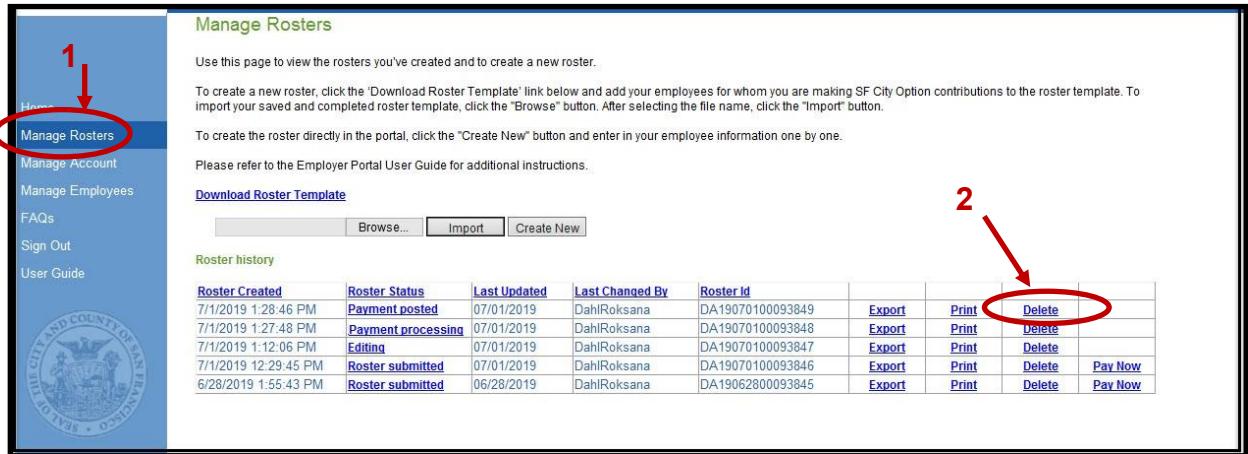
Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export	Print	Delete	
7/1/2019 1:28:46 PM	Payment posted	07/01/2019	DahlRoksana	DA19070100093849	Export	Print	Delete	
7/1/2019 1:27:48 PM	Payment processing	07/01/2019	DahlRoksana	DA19070100093848	Export	Print	Delete	
7/1/2019 1:12:06 PM	Editing	07/01/2019	DahlRoksana	DA19070100093847	Export	Print	Delete	
7/1/2019 12:29:45 PM	Roster submitted	07/01/2019	DahlRoksana	DA19070100093846	Export	Print	Delete	Pay Now
6/28/2019 1:55:43 PM	Roster submitted	06/28/2019	DahlRoksana	DA19062800093845	Export	Print	Delete	Pay Now

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.



Manage Rosters

Use this page to view the rosters you've created and 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](#)

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export	Print	Delete	
7/1/2019 1:28:46 PM	Payment posted	07/01/2019	DahlRoksana	DA19070100093849	Export	Print	Delete	
7/1/2019 1:27:48 PM	Payment processing	07/01/2019	DahlRoksana	DA19070100093848	Export	Print	Delete	
7/1/2019 1:12:06 PM	Editing	07/01/2019	DahlRoksana	DA19070100093847	Export	Print	Delete	
7/1/2019 12:29:45 PM	Roster submitted	07/01/2019	DahlRoksana	DA19070100093846	Export	Print	Delete	Pay Now
6/28/2019 1:55:43 PM	Roster submitted	06/28/2019	DahlRoksana	DA19062800093845	Export	Print	Delete	Pay Now

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/>

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 [SFMRA Enrollment Form](#) that will help SF City Option determine their program eligibility and enroll them in an SF Medical Reimbursement Account. After they are enrolled, your contributions will be assigned to the SF MRA for the employee.

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 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.

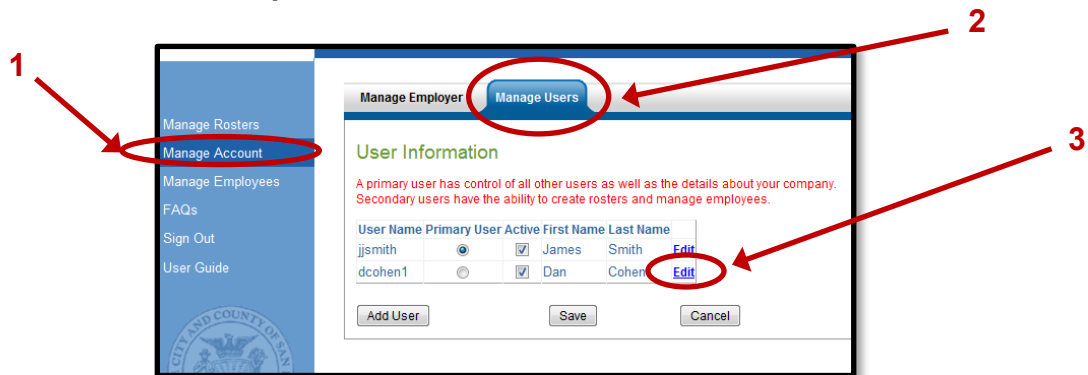
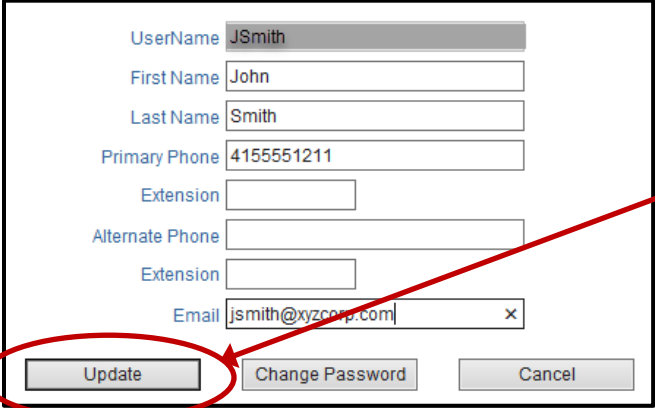
Secondary users only see their own user profile in the Employer Portal. Secondary users cannot "promote" themselves into the role of Primary User.

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.

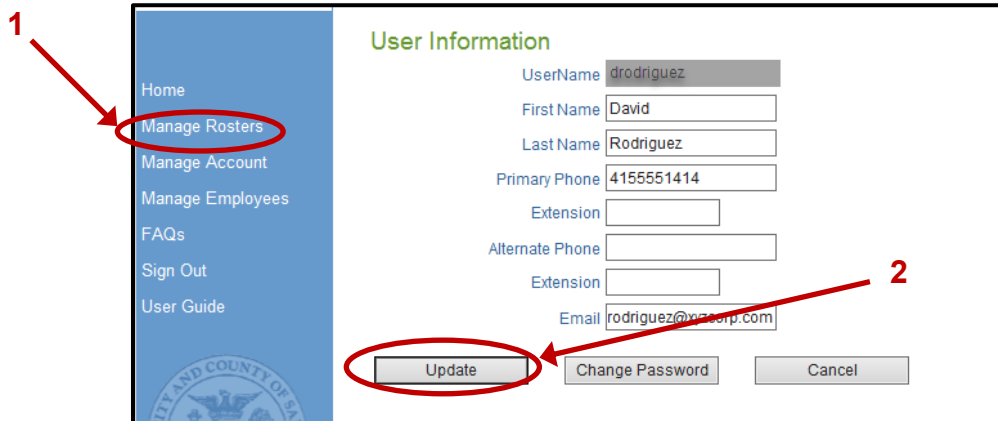
If you are a Primary User, to update information in a user profile, (1) select the **'Manage Account'** menu option, (2) select the **'Manage Users'** tab, (3) click on the **'Edit'** hyperlink corresponding to the user profile you would like to edit, and (4) edit the pop-up box with updated information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

This screenshot shows the user profile update form. A red arrow and number (4) point to the 'Update' button at the bottom of the form.

UserName: JSmith
 First Name: John
 Last Name: Smith
 Primary Phone: 4155551211
 Extension:
 Alternate Phone:
 Extension:
 Email: jsmith@xyzcorp.com

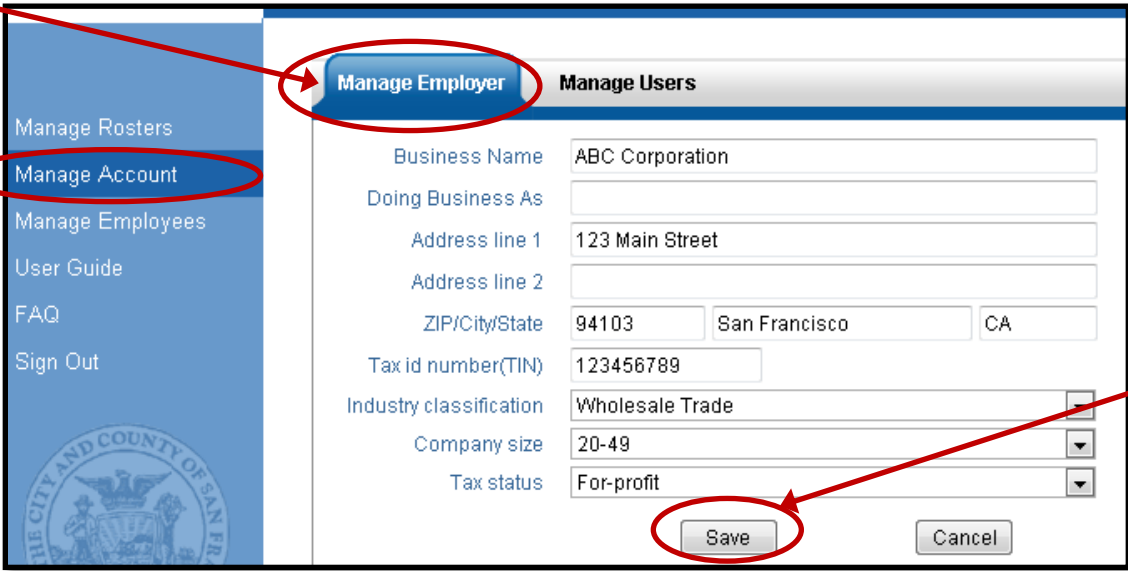
If you are a Secondary User, to update information in your user profile, (1) select the **'Manage Account'** menu option, and (2) edit your account with updated information and click on the **'Update'** button.



The screenshot shows the 'User Information' form in the SF CityOption system. The left sidebar contains the following menu items: Home, Manage Rosters, Manage Account, Manage Employees, FAQs, Sign Out, and User Guide. The 'Manage Account' option is circled in red, with a red arrow labeled '1' pointing to it. The main content area displays the user's information: Username (drodriguez), First Name (David), Last Name (Rodriguez), Primary Phone (4155551414), Extension (empty), Alternate Phone (empty), Extension (empty), and Email (rodriguez@nccorp.com). The 'Update' button is circled in red, with a red arrow labeled '2' pointing to it. Other buttons visible are 'Change Password' and 'Cancel'.

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.



The screenshot shows the 'Manage Employer' form in the SF CityOption system. The interface includes a left-hand navigation menu and a main form area. Red arrows and numbers 1, 2, and 3 highlight the steps to edit the company profile:

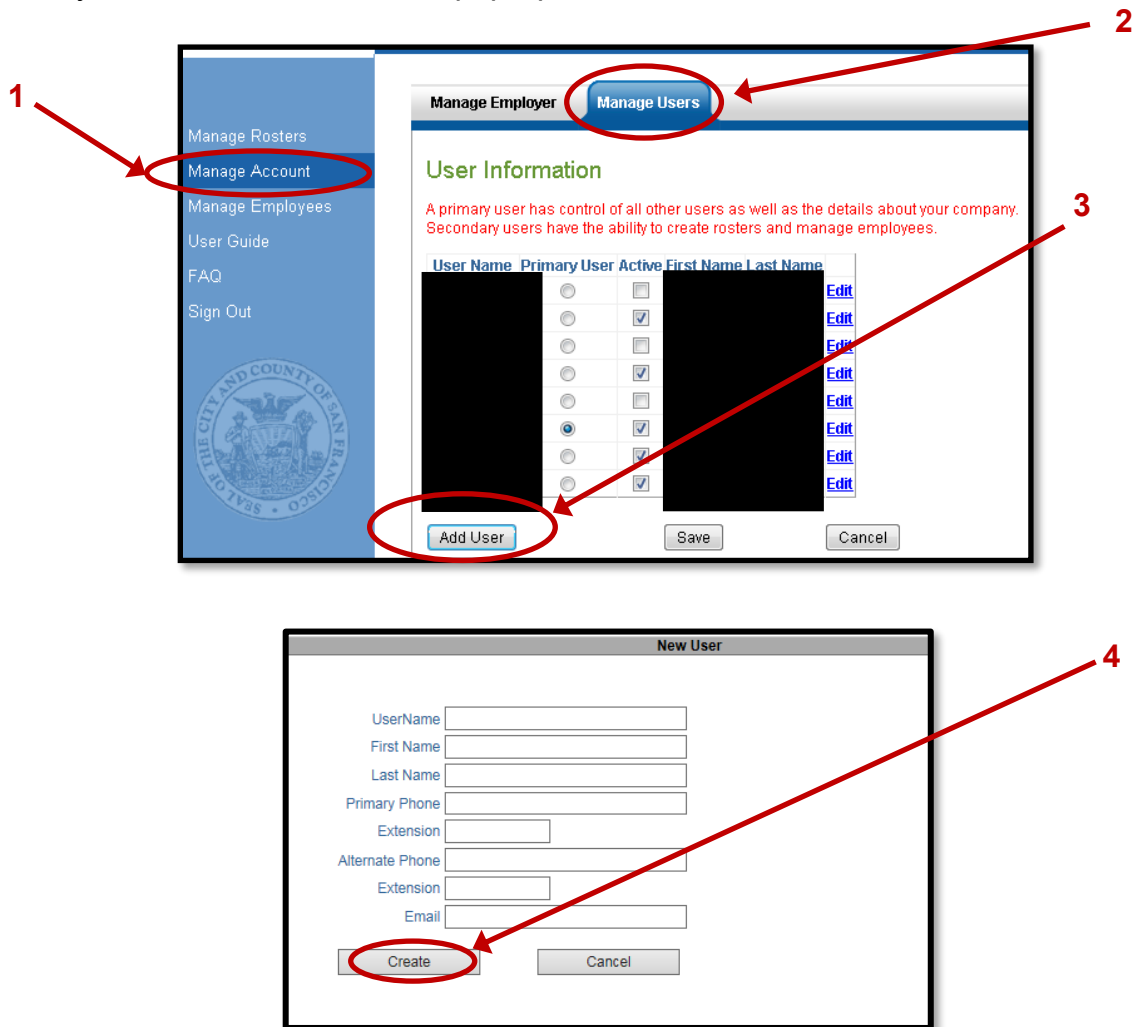
- 1**: Points to the 'Manage Account' option in the left-hand navigation menu.
- 2**: Points to the 'Manage Employer' tab in the top navigation bar.
- 3**: Points to the 'Save' button at the bottom right of the form.

The form fields are as follows:

Manage Employer		Manage Users
Business Name	ABC Corporation	
Doing Business As		
Address line 1	123 Main Street	
Address line 2		
ZIP/City/State	94103	San Francisco CA
Tax id number(TIN)	123456789	
Industry classification	Wholesale Trade	
Company size	20-49	
Tax status	For-profit	
Save		Cancel

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.



The image shows two screenshots from the SF CityOption system. The first screenshot shows the 'Manage Employer' page with the 'Manage Users' tab selected. A red circle highlights the 'Manage Account' option in the left sidebar (callout 1). Another red circle highlights the 'Manage Users' tab (callout 2). A third red circle highlights the 'Add User' button at the bottom of the page (callout 3). The second screenshot shows the 'New User' pop-up form with fields for Username, First Name, Last Name, Primary Phone, Extension, Alternate Phone, and Email. A red circle highlights the 'Create' button at the bottom (callout 4).

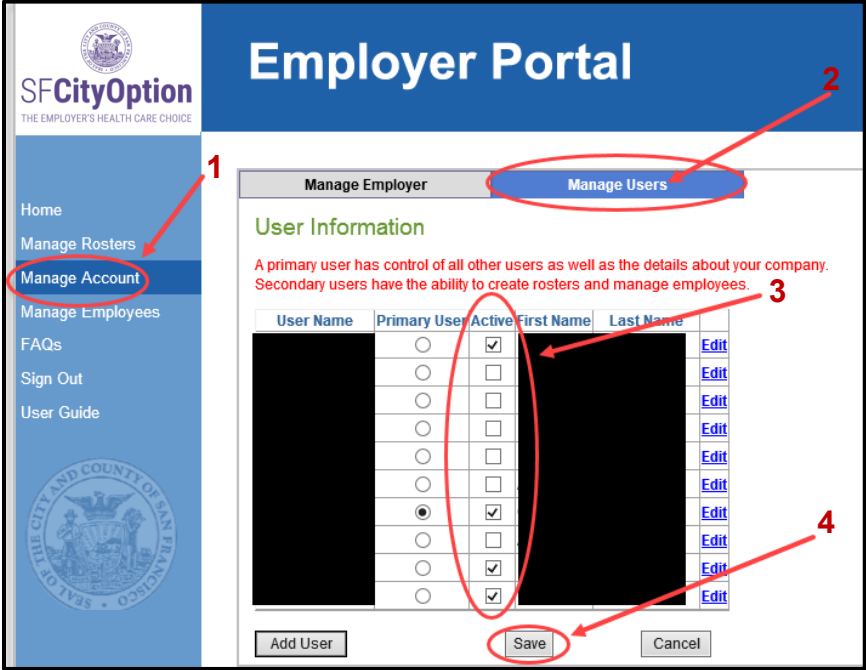
✉ **Check Your Email.** After a Primary User has created a Secondary User's account, the Secondary User will receive a confirmation email containing account login information.

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.



The screenshot displays the SF CityOption Employer Portal interface. The left sidebar contains a menu with options: Home, Manage Rosters, **Manage Account** (annotated with a red circle and arrow labeled 1), Manage Employees, FAQs, Sign Out, and User Guide. The main content area is titled "Employer Portal" and has two tabs: "Manage Employer" and "Manage Users" (annotated with a red circle and arrow labeled 2). Below the tabs, the "User Information" section includes a warning: "A primary user has control of all other users as well as the details about your company. Secondary users have the ability to create rosters and manage employees." (annotated with a red circle and arrow labeled 3). A table lists users with columns: User Name, Primary User, Active, First Name, Last Name, and Edit. The "Active" column contains checkboxes, with one checked and one unchecked (both annotated with a red circle and arrow labeled 3). The "Primary User" column contains radio buttons, with one selected (annotated with a red circle and arrow labeled 3). At the bottom, there are "Add User", "Save" (annotated with a red circle and arrow labeled 4), and "Cancel" buttons.

User Name	Primary User	Active	First Name	Last Name	Edit
[Redacted]	<input type="radio"/>	<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Edit
[Redacted]	<input type="radio"/>	<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Edit

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.

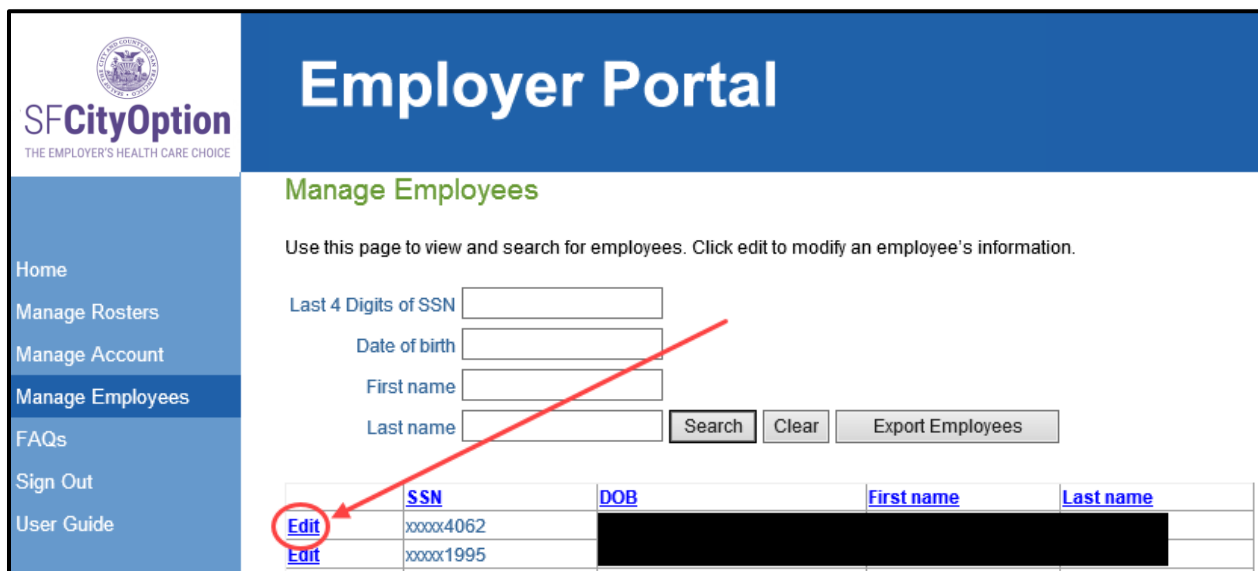
Updating Employee Information

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.



Employer Portal

Manage Employees

Use this page to view and search for employees. Click edit to modify an employee's information.

Last 4 Digits of SSN

Date of birth

First name

Last name

	SSN	DOB	First name	Last name
Edit	xxxxx4062			
Edit	xxxxx1995			

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

*** 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 xxxxx7298

Date of birth 01/01/1983

Firstname Amy

MI

Lastname Test

Address line 1 123 Main St.

Address line 2 Apt. 6

Zip 94520

City Concord

State CA

Primary phone 4155565656

Alternate phone

Unable to Contact Employee at Primary Phone

Does this employee have health insurance? [More info](#) ☐ Yes ☐ No ☒ Unknown

Save

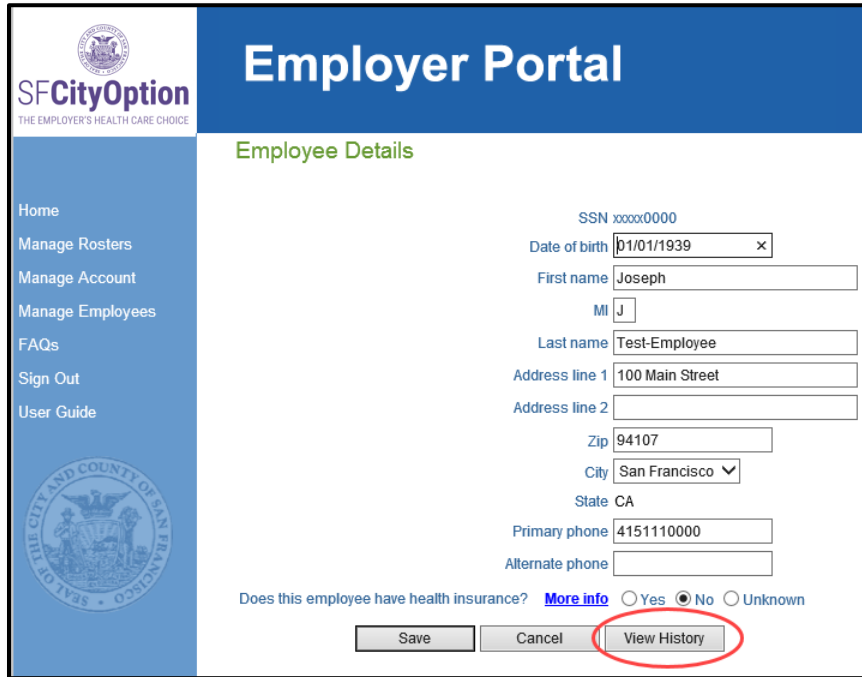
Cancel

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.



Employer Portal

Employee Details

SSN xxxxx0000

Date of birth

First name

MI

Last name

Address line 1

Address line 2

Zip

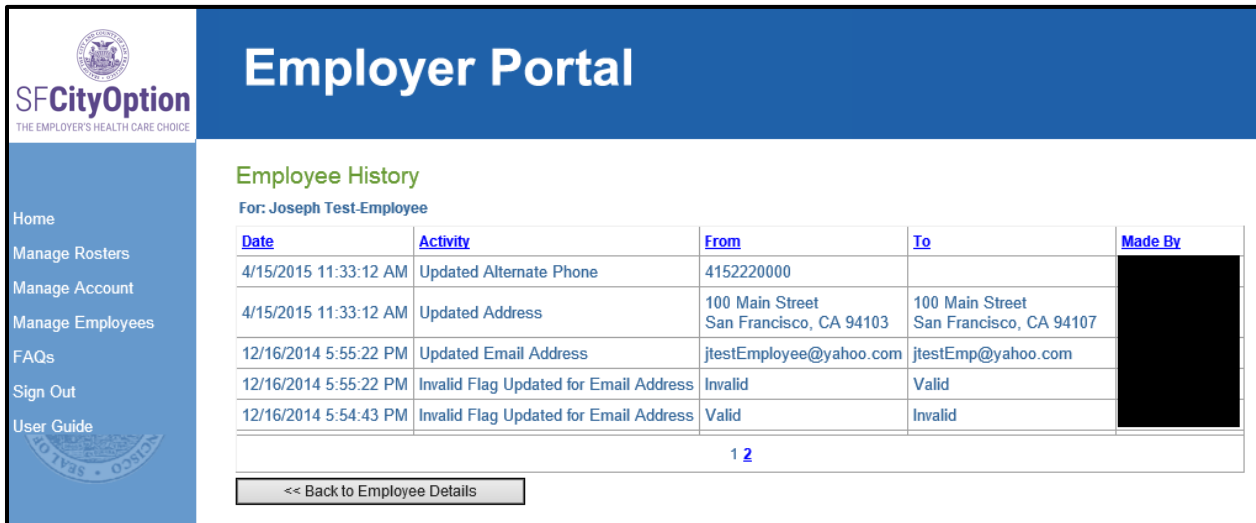
City

State

Primary phone

Alternate phone

Does this employee have health insurance? [More info](#) ☐ Yes ☒ No ☐ Unknown



Employer Portal


Employee History

For: Joseph Test-Employee

Date	Activity	From	To	Made By
4/15/2015 11:33:12 AM	Updated Alternate Phone	4152220000		
4/15/2015 11:33:12 AM	Updated Address	100 Main Street San Francisco, CA 94103	100 Main Street San Francisco, CA 94107	
12/16/2014 5:55:22 PM	Updated Email Address	jtestEmployee@yahoo.com	jtestEmp@yahoo.com	
12/16/2014 5:55:22 PM	Invalid Flag Updated for Email Address	Invalid	Valid	
12/16/2014 5:54:43 PM	Invalid Flag Updated for Email Address	Valid	Invalid	

1 2

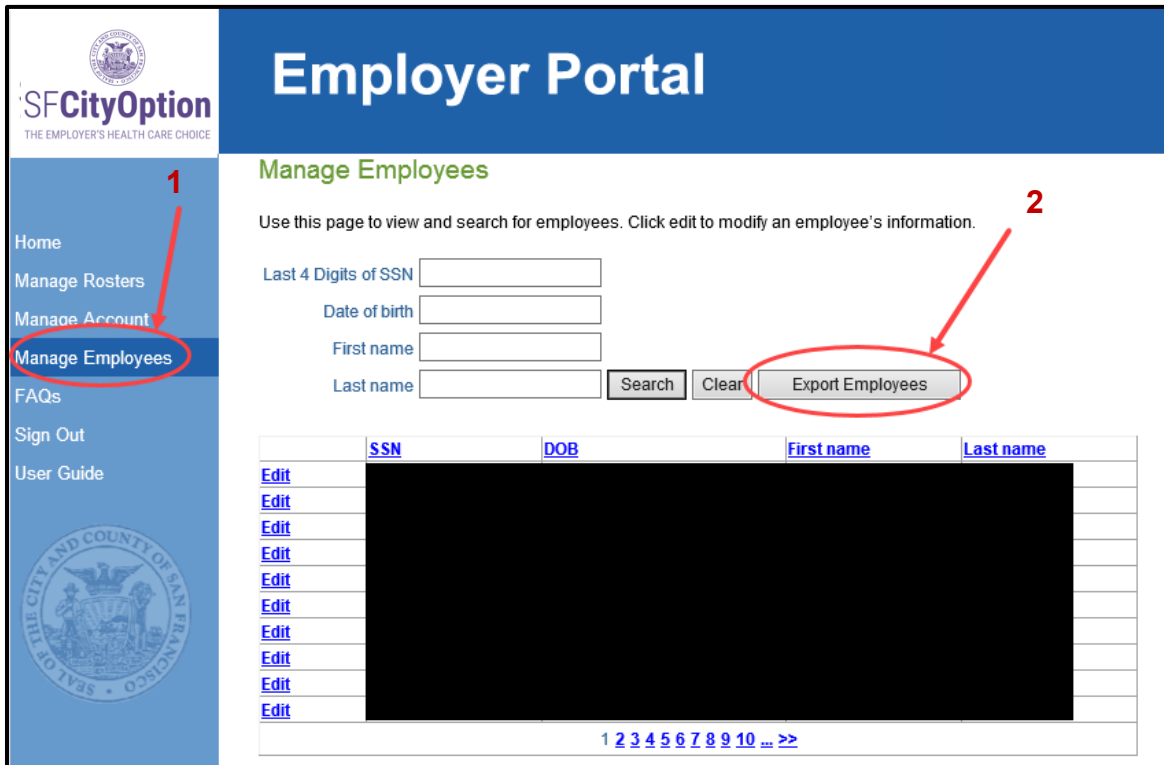
<< Back to Employee Details

 **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.



Employer Portal

Manage Employees

Use this page to view and search for employees. Click edit to modify an employee's information.

Last 4 Digits of SSN

Date of birth

First name

Last name

	SSN	DOB	First name	Last name
Edit				
Edit				
Edit				
Edit				
Edit				
Edit				
Edit				
Edit				
Edit				
Edit				

1 2 3 4 5 6 7 8 9 10 ... >>

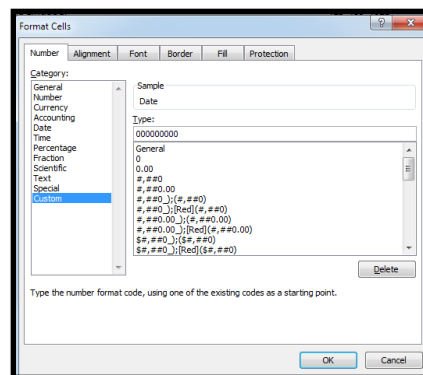
Appendix A: How to Format a CSV File for Your Roster

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**'.



➔ 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.

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
OtherHealthCoverage	Does this employee have other health insurance? (YES/NO/UNKNOWN)	NO	2/7	Required
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	AlternatePhone	OtherHealthCoverage	ContributionAmount
2	123456789	1/1/1971	MICKEY		MOUSE	102 First St		Foster City	CA	94404	6509876543		NO	123.45
3	012345678	2/2/1972	WINNIE	T	POOH	103 First St		Anaheirr	CA	801	9099871234	9093211234	YES	80

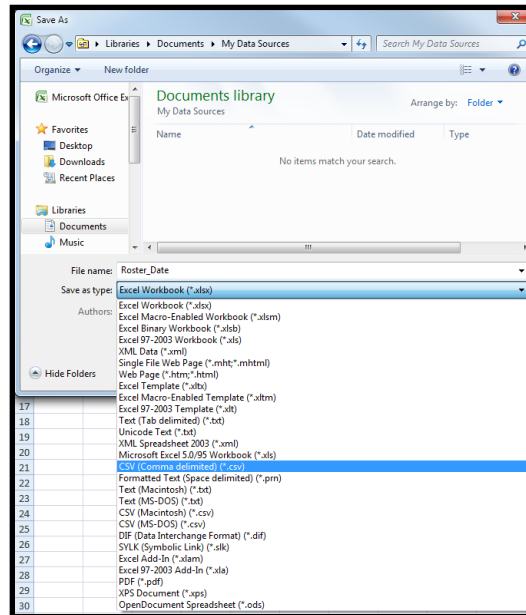
Important notes:

- 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.
- Do not include commas in any of the CSV file cells.

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: 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](#).