



ESR USER GUIDE 4.0

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Introduction

This chapter covers the basic information about the application as well as a description of some of the new features that have been incorporated with the ESR 4.0 upgrade.

About *Healthy San Francisco* and the ESR Portal

Healthy San Francisco is an innovative program designed to make health care services accessible and affordable to uninsured San Francisco residents. It is operated by the San Francisco Department of Public Health (DPH).

Healthy San Francisco enables and encourages residents to access primary and preventive care. It provides a Medical Home and primary physician to each program participant, allowing a greater focus on preventive care, as well as specialty care, urgent and emergency care, laboratory, inpatient hospitalization, radiology, and pharmaceuticals.

San Francisco employers may choose the [City Option](#) ([Healthy San Francisco](#) and [Medical Reimbursement Accounts](#)) to comply with the [San Francisco Health Care Security Ordinance](#) (HCSO).

Through the City Option, *Healthy San Francisco* provides access to medical care for your uninsured employees who meet eligibility guidelines.

If you are a San Francisco employer electing to satisfy the HCSO requirement, you may deposit funds into the City Option on behalf of your employees by visiting the [Employer Login](#) and following the online instructions.

The ESR Portal provides a mechanism where employers who participate in the *Healthy San Francisco* program can upload employee rosters and make contributions to the program. Information about employees and payments can then be referenced by employers using a secure login. In conjunction with the Department of Public Health, *Healthy San Francisco* provides employers a mechanism by which they can upload and manage employees who are eligible for the program. Employers can manage their employee rosters through a number of ways including creating rosters directly in the portal as well as uploading existing rosters into the system. Once entered, employers can make updates to employee information as well as add or delete employees.

Once a roster is submitted, a welcome packet is then sent to the employee with further instructions on how to enroll in *Healthy San Francisco* through the Department of Public Health.

For more information or assistance, please [email](#) or call the *Healthy San Francisco* Employer Service line at **(415) 615-4567**, Monday through Friday, 8:30am to 5:30pm.

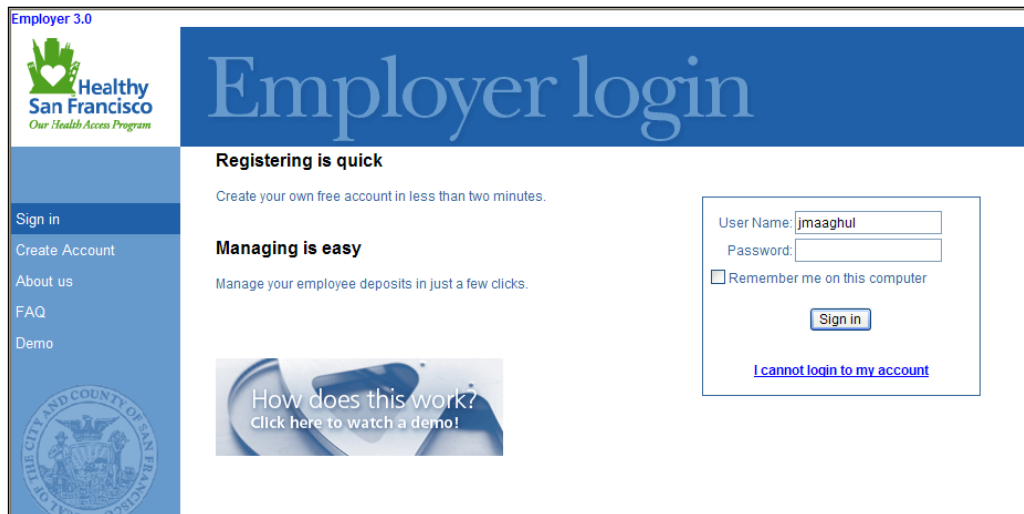
Registration

This chapter covers the basic information about registering employees through the ESR 4.0 portal.


The ESR (Employer Spending Report) allows employers an open registration process where they can create a company account. You can register through the Employer Login link from the *Healthy San Francisco* website at www.healthysanfrancisco.org/employers.

Registering for an account

To register for a new account, select the 'Create Account' button on the left menu from the Employer Login link. Once selected, you will be prompted to enter information about yourself and your company. This information will then be used for future logins into the system.



Employer 3.0



Employer login

Create new account


Sign in

Create Account

About us

FAQ

Demo



First name

Last name

Username

Password

Re-enter password

Security question ▼

Answer

Business name

Doing business as

Address line 1

Address line 2

ZIP/City/State

Primary phone Alt. Phone

Tax id number(TIN) E-mail

Industry classification ▼

Company size ▼

Tax status ▼

User agreement:

By visiting this Healthy San Francisco Employer portal, you agree to our Privacy Policy and Security Policy and the terms and conditions of our services. Your use of this web portal and services is also subject to our terms and conditions. After reading this entire statement, please acknowledge your agreement by clicking on the button at the bottom.

We reserve the right to change the terms and conditions of our services at any time. If you do not agree to the terms of this Privacy and Security Policy, please do not use the web portal.

I agree to these terms and conditions

Create account

As shown in the above screenshot, you will be prompted to enter relevant information about your company along with your company size, tax status and industry classification. Once this information has been completed, you will be prompted to sign the user agreement at which time a new account will be created for you.

Signing in to an account

Once your account has been created, you can then return to the Employer Login screen and use the username and password created in the new account creation screen to log into your account.

The screenshot shows the 'Employer login' page for Healthy San Francisco. The page has a blue header with the 'Healthy San Francisco Our Health Access Program' logo on the left and the title 'Employer login' in large white letters. Below the header is a navigation bar with links for 'Sign in', 'Create Account', 'About us', and 'FAQ'. The main content area is divided into three columns. The left column contains promotional text: 'Registering is quick' (Create your own free account in less than two minutes), 'Managing is easy' (Manage your employee deposits in just a few clicks), and a green oval button that says 'Learn how to make your payment online'. The middle column features a login form with fields for 'User Name:' and 'Password:', a checkbox for 'Remember me on this computer', and a 'Sign in' button. Below the form is a link that says 'I cannot login to my account'. The right column contains a section titled 'Got questions?' with the text 'The ESR User Guide has answers on:' followed by a bulleted list: 'Registration', 'Managing Rosters', and 'Managing Employee Information'. A play button icon is located at the bottom of this section.

Requesting Password assistance

If you forget or lose access to your password, select the '**I cannot login to my account**' link to have your password reset. You will then receive a system generated password. Once you have logged back in using this password, you can go to the 'Manage Account' link on the left-hand blue bar to select your user account and reset your password to a more familiar word or phrase.

Requesting Username assistance

If you need assistance with your username once you have created an account, you can also follow the '**I cannot Login to My Account**' link to have a copy of your username sent to you. If you are having a username sent to you, your password will not be reset and instead will use the same password previously set or provided.

Managing Rosters

This chapter covers the basic information about uploading, entering and managing employee rosters.

As mentioned in the introduction of this guide, employers have the ability, once registered, to upload employee rosters or enter them directly into the ESR portal. The screenshot in the following page shows the options on how to initially entering employee information:

1. Import rosters from your local machine or network using comma separated value (CSV) file
2. Create a roster directly in the portal using the 'Create New' button at the top of the manage roster screen.

When creating a roster, it will be moved through several stages along the way. The following statuses represent each stage:

1. Editing
2. Submitted
3. Payment processed
4. Payment posted

Changes can be made to the roster at any time during this process except once a roster receives the status of '**payment posted**' at which time it can be edited but no longer deleted.

Importing a Roster

In addition to creating a roster by entering in employee data directly into the portal, you can also upload a roster using the CSV file format. Once you have created this file, use the '**import**' button on the front of the page to upload the file directly into the portal. Once uploaded, you can make changes to a roster the same way you can change rosters that were inputted directly into the portal.

NOTE: See the appendix B at the end of this document for the complete instructions on creating and importing a CSV file.

Creating a Roster

Use the '**create new**' button to the right of '**browse**' and '**import**' to enter employee data directly into the portal. Once you have create a roster, the process for then reviewing and submitting it will be the same as if you were importing it.



You will be required to enter all information through the employee entry screen.

The screenshot shows the 'Employer login' page for the Healthy San Francisco program. On the left is a navigation menu with links: 'Manage Rosters', 'Manage Employees', 'FAQ', 'Manage Account', and 'Demo'. The main content area is titled 'Employee Details' and contains a form with the following fields: SSN, Date of birth, First name, MI, Last name, Address line 1, Address line 2, Zip, City, State, Primary phone, Alternate phone, and Total expenditures (with a dropdown for 'In USD'). Below the form is a question: 'Does this employee have health care coverage?' with radio buttons for 'Yes' and 'No', and a 'More info' link. At the bottom right are 'Save' and 'Cancel' buttons.

If you enter the zip code of residence for the employee, the system will automatically populate the default US postal service city for the entered zip code. Your employee will receive program communications even if the city does not match your records as long as the zip code is accurate.

The “date of birth” parameters are ages 15 to 80 from the present date. If you enter a date outside that parameter you will receive the following error message:

“DOB Invalid/Participant age is out of range 15 to 80 years, call employer relations with questions 415-615-4492”.

This screenshot shows the same 'Employee Details' form as above, but with an error message displayed at the top: 'ERROR: Formatting Error'. The 'Date of birth' field is highlighted in orange and contains the value '05/1930'. A red error message on the right side of the form reads: 'DOB Invalid! Employee age is out of range: 15 to 80 years. Call employer relations with questions 415-615-4492'. The 'First name' field contains 'Winnie', 'Last name' contains 'Duck', and 'Zip' contains '94127'. The 'Date of birth' field is highlighted in orange.

Make certain the employee age is correct. If the employee age is correct and outside of the parameters, please contact employer relations.

When adding a new employee directly into the portal, you will be prompted to review the entry and then select the ‘finish’ button to confirm entry of the employee directly into the system.

Reviewing and saving rosters prior to submission

Once you have created a roster, either directly within the portal or by uploading a CSV file, you will be prompted to review the roster prior to submitting it. As part of the review process, you will be able to make changes to any of the employee information. The review process is necessary in order to confirm all the information is correct and then you will submit the roster and make payments to it.

Errors and Warnings during Roster Review

As part of the review, you may encounter warning or error messages that will appear in the form or a message across the top of your screen as well as a yellow or orange bar that highlights the records in question. **A yellow bar represents a warning, and you are encouraged to open the records in question and find the particular issues or conflict that is causing the warning. An orange bar, however, represents an error and your action will be required or the records will not be submitted with the roster.** An example of an error message is below.

SSN	OOB	First Name	ID	Last Name	Address Line 1	Address Line 2	City	State	ZIP	Primary Phone	Alternate Phone	Has Other Coverage	Amount	Status
10775076	Jensen's/1960	ER1Error1	A	ER1Error1	6 First St	6 APT	San Mateo	CA	94118	6501111111	6502111111	No	50.00	ERR
45454444	107181	EmpFirst	A	ER1Error1	6 First St	6 APT	San Francisco	CA	94118	6501111111	6502111111	No	50.00	OK
78554324	54784	EmpFirst	D	ER1Error1	6 First St	6 APT	San Francisco	CA	94118	6504444444	6502444444	Yes	50.00	OK

Once you open the record in question, the system will generate a message at the top of the screen detailing the issue and what you need to do to correct it. The following screenshot provides an example.

ERROR: Formatting Error

SSN 987675678

Date of birth January 1/1960

First name

MI

Last name ER1Error1

Address line 1 6 First St

Address line 2 6 APT

Zip 94101

City San Mateo

State NY

Primary phone 9301111111

Alternate phone 6302111111

Total expenditures 40 In USD Total Expenditures Amount

Does this employee have health care coverage? [More info](#) Yes No Has Other Coverage Invalid

Save Cancel

Once you have a clean copy of your roster on the screen, you will know this by the fact that all rows in your roster table will be white and there will be no further error messages on the screen, you can then submit your roster.

Submitting a Roster

A roster can be submitted at any time as long as Roster Status is 'Editing' and the roster is free of errors. Begin by logging into your Healthy San Francisco account. On the Manage Rosters tab select roster to be submitted.

Manage Rosters

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

Click the "Browse" button to find the file to import. After selecting file name, press the IMPORT button.

Or, click the "Create New" button to create a roster via data entry.

Roster history

Roster Created	Roster Status	Last Updated	Last Changed By	Roster Id	Export	Print	Delete
1/31/2012 11:20:17 AM	Editing	03/12/2012	Andrew2010	MH12013100012795	Export	Print	Delete
1/19/2012 12:00:00 PM	Editing	01/19/2012	Adelia	AD12011900012251	Export	Print	Delete
1/12/2012 4:23:51 PM	Editing	01/12/2012	Lenore	LE12011200012072	Export	Print	Delete
1/11/2012 1:56:23 PM	Editing	01/11/2012	Andrew2010	AN12011100012038	Export	Print	Delete
1/11/2012 1:53:39 PM	Editing	01/11/2012	Andrew2010	AN12011100012037	Export	Print	Delete

1. To proceed click 'Review'. Please make sure you take a moment to review the data and make any necessary corrections before moving on to next step.

Import Roster

Employer Name: Royale Clothier Roster ID: MH12013100012795 Employees to be loaded: 2 Employees with errors: 0 Employees with warnings: 0

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
	123224444	12/25/1962	Merry		Christmas	123 Holly Street		Fremont	CA	94536	5102223333		yes	125.00	
	123567890	03/28/1988	Denise		Silverman	2 Main Street		San Francisco	CA	94103	4155551234		yes	120.00	

2. Click on the 'Finish' button if all data is accurate import the roster. If any last minute corrections need to be made click the 'Back to Edit' button.

Import Roster

Employer Name: Royale Clothier Roster ID: MH12013100012795 Employees to be loaded: 2 Total amount due: \$245.00 Employees with warnings:

Instructions on How To Proceed:
Review your roster and then click the FINISH button to import the Roster 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
	123224444	12/25/1962	Merry		Christmas	123 Holly Street		Fremont	CA	94536	5102223333		yes	125.00	
	123567890	03/28/1988	Denise		Silverman	2 Main Street		San Francisco	CA	94103	4155551234		yes	120.00	

- Please check the 'Terms and Conditions' checkbox to enable the 'Submit' button and click on it.
Note: In addition to submitting your roster you may also 'Print this page' or 'Print this Roster' for your records. If you're paying a roster via check you will need to include a copy of the roster. For questions about the Healthy San Francisco Employer Checklist, please see the 'Included in the Employer Checklist' section.

Healthy San Francisco
Our Health Access Program

Employer login

Healthy San Francisco Employer Checklist

Employer Name: Royale Clothier **Roster ID:** MH12013100012795 **Roster Amount:** \$245.00

Please ensure that all employee data is correct. Your employees will need to provide matching data. Incorrect data will prevent your employees from accessing health care services.

To continue, please check the Terms and Conditions checkbox below and submit your employee roster. After successful submission of this employee roster, please follow the payment instructions on the next screen.

Terms and Conditions:

I understand that all Social Security Numbers and dates of birth must be accurate, and that this information is needed by my employees to apply for a Healthy San Francisco discount or to use Medical Reimbursement Accounts.

I understand that the amount of the payment I submit must match the amount calculated in the employee roster.

I understand that employee rosters will be un-submitted if my check is not received within 30 days, and that my check will be returned if the accompanying employee roster is not submitted within 30 days.

[More Info...](#)

I have read and agree to the Terms and Conditions

[Print this page](#) [Print this Roster](#) [Submit](#)

- Once you have successfully submitted a roster you will receive an automated email confirmation like the one below; you will also be instructed on how to pay the roster in order to complete the process. For more information, please see the 'Making a Payment' Section.

Healthy San Francisco
Our Health Access Program

Thank you for submitting a roster.

Dear Sir/Madam,

You have submitted a Healthy San Francisco City Option roster with Roster ID MH12013100012795 . You have a corresponding deposit amount of \$245.00 due.

If you would like to see your roster and payment status online, please log in to the Healthy San Francisco Employer Login site <http://www.healthysanfrancisco.org/employers/> at any time.

Sincerely,

Healthy San Francisco City Option

Making a Payment

Now that you have successfully submitted your employee roster you must make a payment to complete the process. You can make a payment electronically through Union Bank of California's secure website "This service is free" Or via check.

1. Making an electronic payment: *You will need your company's bank routing and account number
 - a. To get started click the 'Proceed to Online Payment' button

Healthy San Francisco
Our Health Access Program

Employer login

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

- 1 Make your payment online. With 3 easy steps.**
Before you start make sure you have your:
 - Bank Routing Number
 - Bank Account Number
- 2 Mail a hard copy of your employee roster with an accompanying check to:**
Healthy San Francisco
Employer Payment Center
201 Third Street, 7th Floor
San Francisco, CA 94103

Employees who meet program eligibility guidelines will receive a letter within the next 30 days from Healthy San Francisco, inviting them to apply at a designated enrollment center. **Employees must wait to receive this letter before attempting to apply for the program.**

If an employee does not qualify for Healthy San Francisco, that employee will receive information within 4-6 weeks about how to access a personal Medical Reimbursement Account (MRA). **Employees must wait to receive this letter before attempting to access MRA funds.**

If you have questions, please call:
Healthy San Francisco Employer Services (415) 615-4567 or Accounts Receivable (415) 615-4590.
Business Hours are Monday through Friday, 8:30am to 5:30pm Pacific Time
OR
Email: online_payment@sfp.org

[Go Back To Rosters](#) [Proceed To Online Payment](#)

- b. You will now be prompted to the 'Online Payment' option, to continue please press the 'Pay Online' button; this will take you to Union Banks Online Bill Pay website.
*If you do not have access to your company's bank information you may 'Cancel' and pay for this roster at a later time by login back to healthysanfrancisco.org and under manage rosters tab select the 'Pay Now' hyperlink.



- c. Please enter your bank account's Routing Number and Account Number. Select account type from drop down menu, click the 'Terms & Conditions' checkbox and press 'Next'

*Please Note: Roster ID and Amounts are both lockdown and cannot be changed. You may however change the Personal Details section.

IMPORTANT: This is an electronic payment submission only and not an ACH deposit.

UnionBank

Electronic Receivable Services: Online Bill Pay

Please provide/verify the Personal Details below:

Company Name: Royale Clothier

Name (First/Last): Yesenia / Gomez

Address 1 / 2: 123 Main /

City/State/Zip: Sunny City / California / 94941

Email: (Optional) rclothier@sftp.org

Phone: (e.g. 415-222-2222) 415-555-1234

Please provide/verify Receiver Details below:

Roster ID: MH1201310001279

Please provide/verify Payment Details below:

Amount (\$): 245 . 00
(Minimum amount: \$5.00 Maximum amount: \$999,999.00)

Payment Type: eCheck

Routing Number: [Red Box]

Account Number: [Red Box]

Account Type: Select account type

How do I find Routing Number and Account Number on my Check?

Terms & Conditions:
Agreement Date: June 1, 2002
Welcome to the SameDayPay Service offered by BServ, Inc. on behalf of your Receiver. In order to use

I have read and agree to the Terms & Conditions. [Click here to print.](#)

Next

Healthy San Francisco
Our Health Access Program

We Respect your Privacy

We will not give, sell, share or rent this information to others. We may, however, validate this information with third parties provided that your information is kept confidential.

The information you provide will only be used to facilitate your payment transaction.

- d. Verify that your information is correct and proceed by pressing the 'Send payment' button.
To make any changes please use the back button on your browser

UnionBank

Electronic Receivable Services: Online Bill Pay

Please review the following payment details. To edit, please go back using browser back button. To complete payment click on "Send Payment".

Personal Details:

Company Name: Nike Retail Services, Inc.
Name (First/Last): Summer Day
Address1/2: 1 Bowerman Drive
City/State/Zip: BEAVERTON, OR 97005
Email: jwalcer@sftp.org
Phone: 4155551234

Receiver Details:

Receiver Name : San Francisco Comm Health Auth
Roster ID SU10060900002153

Payment Details:

Pay From : *****9889 / WELLS FARGO
Amount: \$317.86
Convenience Fees: \$0.00
Total: \$317.86
Payment Date: 06/09/2010

Payment Review

You're almost done!

Please verify that all the information to the left is correct, then click the "Send Payment" button.

Send payment

- e. To complete your transaction you must click the 'Submit' button. You will receive an email confirmation once payment has been processed if an email address was provided.

IMPORTANT: To avoid making a duplicate payment DO NOT use your back button on your browser

UnionBank

Electronic Receivable Services: Online Bill Pay

Your confirmation no is: **84133444**.

Please print this page for your reference.

Pay From: *****9889 / WELLS FARGO
Pay To: San Francisco Comm Health Auth
Amount: \$317.86
Payment Date: 06/09/2010

Thank you for using SameDayPay.

Submit Please click the "Submit" button to complete your payment with San Francisco Comm Health Auth. If you do not submit your information now, then there may be a delay in notifying San Francisco Comm Health Auth.

Payment Confirmation

Your transaction is almost complete.

Please click the **"Submit"** button to complete your payment with San Francisco Comm Health Auth.

If you provided an email address as part of your personal details you will receive a confirmation email once this payment has been completely processed

[Privacy](#) | [Security](#) | [Terms & Conditions](#) | [FAQ](#)

2. Making a payment via Check

Simply mail your check along with a copy of your employee roster to:

Healthy San Francisco Employer Payment Center
201 Third Street, 7th Floor
San Francisco, CA 94103

Make Checks Payable to: Healthy San Francisco Program Employer Payment Center



Included in the Employer Checklist

The checklist provides the following statements. A brief description of each of these statements will be included on your browser screen, but you can simply click on the **'more'** button at any point to see the full policies.

City Option No Refund Policy

No refund or adjustment will be made to an employer's City Option payment once the payment has been assigned to *Healthy San Francisco* or to a Medical Reimbursement Account (MRA). Before making a City Option payment, an employer must make certain that all calculations are correct.

Accuracy of Employee Information

The Social Security Number and date of birth submitted to the City Option by an employer will be used by an employee to either apply for *Healthy San Francisco* and receive a discounted fee or access a Medical Reimbursement account. If the Social Security Number and date of birth the employee provides does not match the information submitted by the employer, that employee will either be ineligible for the 75% discount on *Healthy San Francisco* program fees or will be unable to access their Medical Reimbursement Account.

Accuracy of Payment Amount

The payment amount submitted to the City Option by an employer must match the amount calculated in the accompanying employee roster. If the amount does not match, the employer's check will be returned with a request for an accurate amount. The roster will not be processed and employees will not receive access to their health coverage option until the accurate amount of the payment is received.

30-Day Submission Policy for Employee Roster and Payment

Employee rosters and roster payments must be submitted within 30 days of one another. If payment for an employee roster is not received within 30 days of submitting the roster, the employee roster will be discarded and will need to be resubmitted by the employer. If an accompanying employee roster is not submitted within 30 days of receiving a payment, the payment will be returned to the employer. In both instances, the employer roster will not be processed and employee(s) will not receive access to their health coverage option until a matching roster and check is received within 30 days of one another.

Employee Information Update Policy

Updates, corrections or other changes to employee information can only be made by an employer. Neither an employee nor a City Option representative is authorized to make updates to, or otherwise alter, employee information. Any

corrections or changes made to an employee's information must be reflected in all rosters. To view older/outdated employee information, click on the '**View History**' button from the employee details screen.

If information is incorrect employees may be ineligible for the 75% discount on *Healthy San Francisco* program fees or will be unable to access their Medical Reimbursement Account until the correct information is resubmitted in a future roster.

Healthy San Francisco Eligibility

When an employer makes a payment to the City Option, some employees are assumed eligible for *Healthy San Francisco* based on information the employer has provided. However, employees must still apply for the program, at which time a program representative will confirm eligibility. An employee may qualify for *Healthy San Francisco* if he or she is all of the following:

- A San Francisco resident who can provide proof of residency;
- Uninsured for at least 90 days;
- Not eligible for public insurance programs such as Medi-Cal or Healthy Families;
Between the ages of 18 and 64

If an employee meets eligibility requirements, he or she may join *Healthy San Francisco* regardless of immigration status or pre-existing medical conditions.

If an employee does not meet eligibility requirements, that employee's payment will be transferred to a [Medical Reimbursement Account](#).

Medical Reimbursement Account Process

If an employee does not qualify for *Healthy San Francisco*, the payment made to the City Option by the employer on behalf of the employee will be used to fund a Medical Reimbursement Account (MRA). An employee may use MRA funds to pay for out-of-pocket medical, dental, and vision care expenses.

If an employee is assigned an MRA:

Within 4-6 weeks he or she will receive program materials from our MRA vendor, and a confirmation that an account has been established in their name. The employee will be able to use the funds in the account to get reimbursed for medical expenses that occur after their MRA enrollment date, which is the date an employer's payment check clears the bank. To begin using the MRA, an employee should follow the simple reimbursement procedures outlined in the program materials.

A Note on Changes to Data

At any time even after you have submitted your roster you can make changes to it or the employee data with the exception of when the roster has received the status of '**Payment Posted**.' Payment posted status will be assigned once your payment has been received and posted to the account. At this point you will no longer be able to delete or make changes to the roster.

Deleting an entire roster after submission

Once a roster has been imported, you have the option to delete the roster using the '**delete**' link. Once you delete a roster, the system will no longer store that information. The only way to replace a deleted roster is to import or enter the roster again.

Viewing, adding, updating and deleting employee data

Once you have added an employee roster, either through the import process or directly through the '**Create New**' button on the Manage Rosters screen, you will then have the ability to make any changes to the employee data through the following functions:

1. The edit link in the roster.
2. The 'Manage Employees' link in the left-hand blue bar

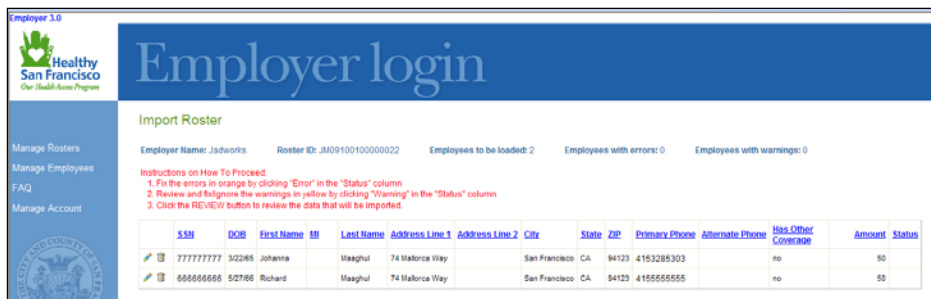
From either of these locations, you will be able to pull up an employee's information and make necessary changes and modifications.

IMPORTANT NOTE:

When importing a new roster, employee data can be overwritten, but once the roster is in posted status, the data will remain locked until finalization.

If you have added an employee to a roster, you have the ability to either edit or delete the employee's information directly from the roster prior to final roster submission but once the roster is in posted status, it cannot be deleted or edited.

When adding employee information into the roster (either through direct entry or when you import a roster), you will be prompted to also enter a contribution amount for each employee. These contributions will then be displayed as part of the employee information in each roster.



Update Roster Options

IMPORTANT: When a roster is updated, any change to the employee information will be overwritten. Changes to rosters can be made either by directly making edits to the employee data or the entire roster can be overwritten with the import of a new roster.

Once a roster has been submitted, you make changes to the employee's demographic information by clicking on the **"Manage Employees"** screen. Changes made from this screen will be applies to all rosters containing the employee.

You can view an individual employees' overwritten information by clicking on the **"View History"** button from the bottom of the "Employee Details" screen.

Remember, the "date of birth" parameters are ages 15 to 80 from the present date. If you enter a date outside that parameter you will receive an error message. Make certain the employee age is correct. If the employee age is correct and outside of the parameters, please contact employer relations.

The screenshot shows the 'Employer login' interface. On the left is a blue sidebar with the 'Healthy San Francisco' logo and navigation links: 'Manage Rosters', 'Manage Employees', 'FAQ', 'Manage Account', and 'Sign Out'. Below these links is the official seal of San Francisco. The main content area is titled 'Employee Details' and contains a form with the following fields: SSN (112233445), Date of birth (01/01/1995), First name (James), MI (empty), Last name (Ambrose), Address line 1 (1234 Third St), Address line 2 (empty), Zip (94101), City (San Francisco), State (CA), Primary phone (4152579265), and Alternate phone (empty). At the bottom of the form, there is a question: 'Does this employee have health care coverage?' with radio buttons for 'Yes' and 'No' (selected), and a 'More info' link. Three buttons are at the bottom: 'Save', 'Cancel', and 'View History'.

Exporting and Re-using Rosters and Employee Data

In addition to creating or importing a new roster, a third option you have is to re-use an existing roster by exporting it using the **'export'** button and then making changes to it. This method can save time since you will not need to create the new employee records from scratch.

Roster FAQs

What are these Rosters that I see and never created/submitted?

All rosters for your business now display for each of the login accounts of that business. Previously, you may have only been able to see those rosters that you submitted individually. This has now been changed and now you will most likely be able to see ALL rosters that have been submitted by your organization.

What are these Orange Error roster lines saying?

When you are creating or submitting roster, you may see an orange or yellow color that denotes an action that needs to be taken on your part. An **orange line** implies that there are two records that have similar information and clarification may be needed to differentiate these records. It could also mean that a record was previously entered and that there are now duplicates for the same employee with different information. If you do not take action with one of these entries and the duplicate error occurs within the same roster, neither of the two records highlighted in orange will be saved into the system. If the system finds an error in the current roster when comparing it to previous employees, the system will reject the newer record and retain the information associated with the older record. A **yellow line** implies that the system has found a conflict in the records, but not strong enough to require action prior to importing these records. In other words, it is important that these records be reviewed for accuracy, but if no changes are made, they will still both be successfully saved to the system.

Where is the history of my Rosters entered in 2008?

Rosters entered in 2008 are no longer available directly through login to ESR 4.0. You can, however, contact your employer relations for access to this information.

How will my Employee edits impact Rosters?

Employee benefits are tied to the latest employee information in the portal. Some changes will cause some HSF contributions to be transferred to an employee MRA account.

Managing Employees

This chapter covers the basic information about managing employee information.

You can make changes to employee records from the **'Manage Employee'** menu option. You can use one of the search fields to locate an employee and then make changes to their information.

An important note about changes to employee information; when an employee has had any one of the three important factors changed, there will also be changes to their contribution account.

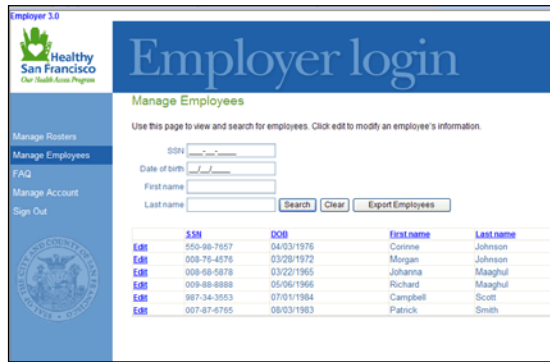
Changes in the type of contribution account can be effected from any one of the following:

1. **Change in birth date:** Only employees who are between 18 and 64 years of age are eligible for the *Healthy San Francisco* Program
2. **Changes in residency:** Only employees who live in San Francisco are eligible for the *Healthy San Francisco* Program
3. **Changes in other coverage:** An employee who has other coverage selected is not eligible for the *Healthy San Francisco* Program.

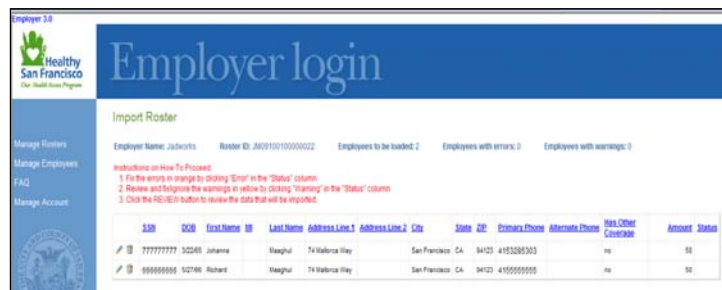
Also note that when a new roster is imported through the CSV file import or by directly changing it through the edit roster feature, changes to the employee information made through the Manage Employee feature will be impacted.

Searching for an Employee

From the **'Manage Employees'** menu, you can search for an employee. Employees can be located by entering and searching using any combination of SSN, DOB, first name, last name.



Click on "edit", to make changes to the employee's information.



Updating Employee Information

Once you click on the 'edit' button, you can then make changes to any part of the employee record. Note that changes that you make to this record will override any changes that have been added in any previous imported or created rosters.

Employee 3.0
Healthy San Francisco
Our Health Access Program

Employer login

Employee Details

SSN: 008685678
 Date of birth: 03/22/1985
 First name: Johanna
 Last name: Maaghul
 Address line 1: 75 Mallorca Way
 City: San Francisco
 State: CA
 Zip: 94123
 Primary phone: 4155555555

Does this employee have health care coverage? Yes No [More info](#)

[Save](#) [Cancel](#) [View History](#)

Viewing Employee History

You can also select the 'view history' button to see all changes to the employee's information. The view history button screen shot below illustrates the changes that have been made to the employee's information.

Employee 3.0
Healthy San Francisco
Our Health Access Program

Employer login

Employee History

For: Johanna Maaghul

Date	Activity	From	To	Made By
10/12/2009 3:40:09 PM	Updated address	75 Mallorca Way San Francisco, CA 94123	75 Mallorca Way Apt b San Francisco, CA 94123	Johanna Maaghul (jmaaghul)

[← Back to Employee Details](#)

Exporting Employee Data

As mentioned earlier, exporting employee data is a useful way to create new rosters. Employee data that is accessed and exported from the Manage Employees menu bar is the most current and up to date information available from the portal. From the Manage Employee screen, you can click on the **'Export Employees'** button which will export all employees displayed on the **'Manage Employees'** screen.

When existing rosters are used as templates to create new rosters, there is a higher risk that they may contain out of date information. Because all of the most current information is fed back to the Manage Employees area of the site, this serves as the best data set for exporting and re-creating new rosters.

A Note on Changes in Contribution Account

An important note in changes to an employee's contribution account is that when any of the following three changes are made, an employee's contribution account can also be affected:

1. **Change in birth date:** Only employees who are between 18 and 64 years of age are eligible for the *Healthy San Francisco* Program
2. **Changes in residency:** Only employees who live in San Francisco are eligible or the *Healthy San Francisco* Program
3. **Changes in other coverage:** An employee who has other coverage selected is not eligible for the *Healthy San Francisco* Program.

Managing Employees FAQs

Why can't I find an Employee in Manage Employees who is on a roster?

Employees are only available if they have a contribution that has cleared the bank. Employees that may have been imported in a roster and have been set up to receive contributions will NOT be available their contribution has cleared. If you need to make changes to this employee's information, you can do this by updating or re-importing their information in the roster.

Why can't I find an Employee in Manage Employees who is on a roster?

Employees are only available if they have a contribution that has cleared the bank. Employees that may have been imported in a roster and have been set up to receive contributions will NOT be available their contribution has cleared. If you need to make changes to this employee's information, you can do this by updating or re-importing their information in the roster.

Managing Employer Account

This chapter covers the basic information about managing the employer account and its users.

Managing Employer Information

From the Manage Account menu option on the blue bar on the left side, you can make changes to your employer screen directly.

Employer 3.0
 Healthy San Francisco
 Our Health Access Program

Employer login

Manage Rosters
 Manage Employees
 FAQ
 Manage Account

Manage Employer | Manage Users

Business Name: Jadworks
 Doing Business As:
 Address line 1: 255 California Street Suite 600
 Address line 2:
 ZIP/City/State: 94111 San Francisco CA
 Tax id number(TIN): 943357653
 Industry classification: Information
 Company size: 0-19
 Tax status: For-profit

Save Cancel

Manage Users Options

Once you select the Manage Account menu option on the left blue bar, you will see two tabs across the top of your manage employer area. The first tab on the **Manage Employer** feature allows you to make changes to your employer information, where the second tab, **Manage Users**, allows you to make change to users who have access to the system. At any given time, there is only ONE single primary user who has the ability to add or remove other users. A primary user can, however 'demote' themselves to no longer be the primary user and move another user up into that role. A secondary user, however, cannot 'promote' them into the role of primary user.

Employer 3.0
 Healthy San Francisco
 Our Health Access Program

Employer login

Manage Rosters
 Manage Employees
 FAQ
 Manage Account

Manage Employer | Manage Users

User Information

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.

User Name	Primary User	Active	First Name	Last Name	
jmaaghul@jadworks.com	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Johanna	Maaghul	Edit
rmaaghul@jadworks.com	<input type="radio"/>	<input checked="" type="checkbox"/>	Richard	Maaghul	Edit

Add User Save Cancel

Manage Employer Account FAQs

How do I use the Manage Account page?

Employers with multiple users entering rosters into the system will control their own company user accounts, including creating users and resetting passwords. This is a new feature that has been added since the previous version and allows ALL users to see each other's rosters. This feature was not previously available. Only the primary user for an employer can add or remove other users from the Manage Account link.

Appendix B: How to Create a CSV File Using Microsoft Excel

The following instructions are for creating a comma-delimited or comma-separated value file known as a “CSV” file using Microsoft Excel. You may use any recent version of Microsoft Excel to create a CSV file (Microsoft Excel 97, 2000, XP, 2002, 2003, 2007). Log in and import the file at:

<https://employerportal.healthysanfrancisco.org/>

Note: If you choose to use another spreadsheet program to create a CSV file, please refer to that program’s instructions for creating a CSV file.

Things to know before you start:

The two difficult parts of creating a CSV file are:

Gathering the data.

Formatting the file.

The CSV file will not import properly if it has missing columns, extra columns, or extraneous rows.

Step 1: Gather your data

The following table (Table 1) shows the information you need to gather for each employee receiving a contribution. Do not include employees receiving a \$0.00 contribution:

Table 1: CSV file information

Data (column name)	Description	Formatted example	Min/Max field length	Requirement
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	Residential address line 1	201 First Street	1/255	Required
Address2	Residential address line 2	Apt 3	0/255	Optional
City	Residential city	San Francisco	1/50	Required
State	Residential state (abbreviation)	CA	2/2	Required
ZIP	Residential ZIP code	94102	5/5	Required
PrimaryPhone	Primary phone number	4155552000	10/10	Required
AlternatePhone	Alternate phone number	4155551234	0/10	Optional
OtherHealthCoverage	Does this employee have other health coverage (YES/NO)	NO	2/3	Required
ContributionAmount	The amount contributed for this employee (\$0.01 and greater)	123.45	8,2	Required

Note: Some companies get this information from other computer systems. Others may have this information already in spreadsheets. As you gather this information, store it in Excel to make the process easier.

Step 2: Create your file

Now that you have the information you need, perform the following steps:

1. Open Microsoft Excel
2. Create your file's header row by typing the following column names exactly (without quotation marks or spaces between words): a) In cell A1, type "SSN" b) In cell B1, type "DOB" c) In cell C1, type "FirstName" d) In cell D1, type "MI" e) In cell E1, type "LastName" f) In cell F1, type "Address1" g) In cell G1, type "Address2" h) In cell H1, type "City" i) In cell I1, type "State" j) In cell J1, type "ZIP" k) In cell K1, type "PrimaryPhone" l) In cell L1, type "AlternatePhone" m) In cell M1, type "OtherHealthCoverage" n) In cell N1, type "ContributionAmount"
3. Enter employee data **in the format specified** in Table 1 (in step 1) a) In cell A2, enter the first employee's social security number. b) In cell B2, enter the first employee's date of birth. c) In cells C2-N2, enter the appropriate information. d) Enter in the rest of your employees or copy/paste this information from the appropriate source

Excel tip: If your social security numbers have leading zeroes, you must use custom formatting to display the leading zeroes on your spreadsheet properly. Right-click column A and select Format Cells. In the Number tab under Category, select Custom. In the Type field, enter "000000000" (nine zeroes, without quotes) and click OK. If you choose not to use custom formatting, you will encounter errors during the import process.

Important notes:

- Middle Initial (MI), Address2, and Alternate Phone are optional fields for each employee row, but all three columns must be present in order for the roster to import properly.
- If your file has missing columns, extra columns, or extraneous 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 2008" 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, SSN "123456789 " will cause an error because of the extra spaces after the last digit.

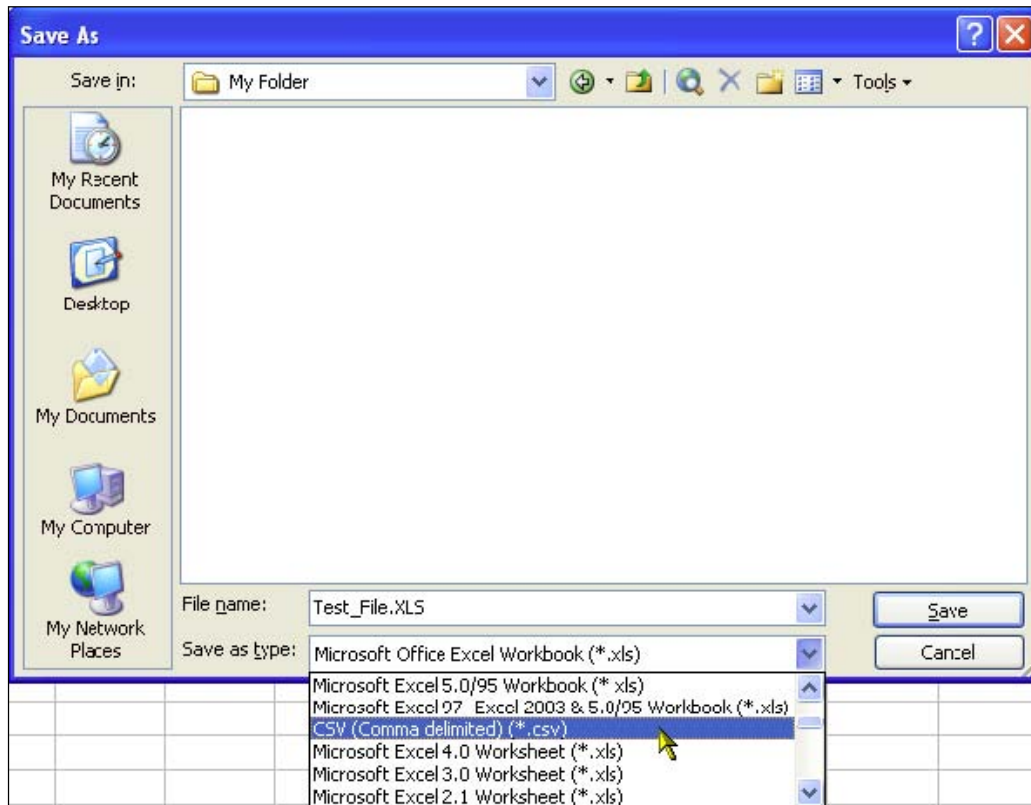
After the creating the header row and entering two employees, your file should look something like this:

	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		Anaheir	CA	801	9099871234	9093211234	YES	80

Step 3: Save your file

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

1. From the File menu, select "Save As..."
2. From the "Save in:" drop-down menu, select the location to save your file.
3. In the "File name:" field, type the name you wish to call this file.
4. From the "Save as type:" drop-down menu, scroll down to select "CSV (comma-delimited) (*.csv)" and Click Save (see below).



Your file is now ready to import via the *Healthy San Francisco* website.

Note: If you open your CSV file, it will not look like the original Excel file you created. Do not be alarmed. If you followed these instructions, the file will import properly.

This site will attempt to import your entire file regardless of any formatting errors that may reside in the file. However, we do not accept responsibility for data that is imported improperly. We offer you the option to make adjustments to the file that you import. As such, we cannot accept responsibility for any inconveniences caused from discrepancies between the file you originally imported and the roster that you eventually submit to us. For information regarding use of this site, please see the website's Terms and Conditions.