





Table of Contents			•	
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1.	Getting Started	2
2.	Add a property	4
3.	View Property Details Page	5
4.	View details and track status of the submitted exemption request	5
5.	Updating Contact Information	7
6.	Viewing a Payment Obligation	11
7.	Add to Cart	13
8.	Remove From Cart	15
9.	Checkout Process	16
10.	Submit housing inventory information	25

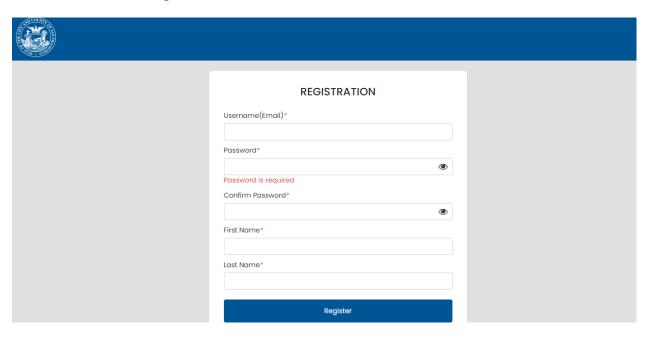


1. Getting Started

• Access <u>portal.sfrb.org</u> where you see the landing page as such:

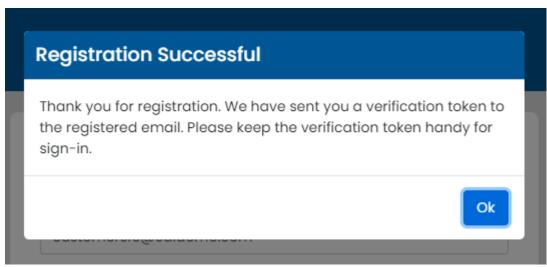


- NOTE: If this is your first time using the portal continue here. If you already have an account, please log-in and go to step 2 in the manual.
- Click on the "Register"



- Enter information
- NOTE: (Password requirements are: Password must contain at least 8 characters of the following character types: Upper Case (A-Z), Lower Case (a-z), Number (0-9), and Special Character (!@#\$%^&*).
- Click "Register"

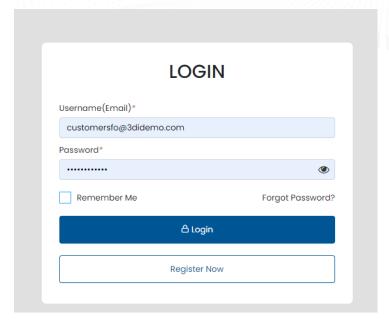




• Click "Ok" in the pop-up, to receive verification token in your email inbox. NOTE: The token will be sent to the email address you used to register with. Please check your spam/junk folders in case the token was sent there.

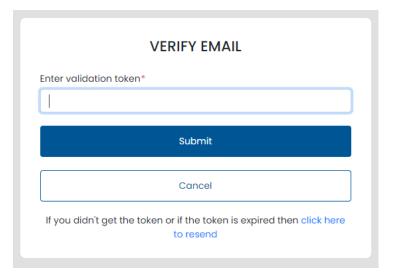
•

- You will then see a "Login" pop-up.
- Enter the username (email) and password you used to register. NOTE: In order to login, you must have completed the registration steps above. Once you complete, this, a pop-up will ask you for your token from your email address.



• Click "Login"

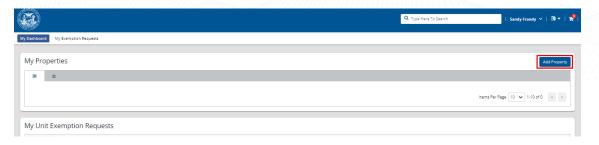




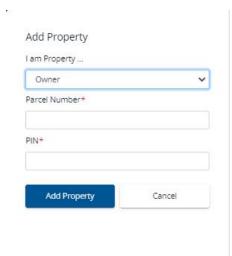
- Input the token you received in your email
- Click Submit

2. Add a property

- · Login and access your dashboard
- Click on "Add Property" on the right hand side



- In the pop-up, enter your parcel number and PIN
- NOTE: refer to image to see where to find your PIN



Where to find my PIN?

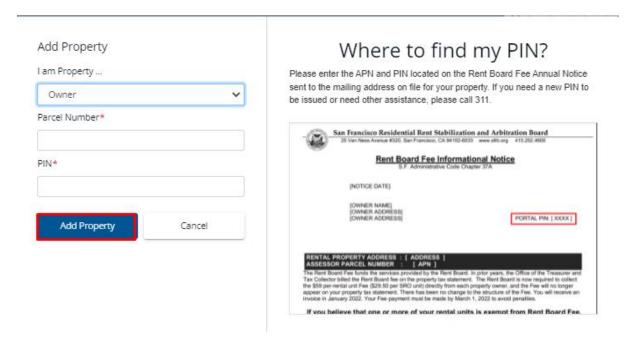
Please enter the APN and PIN located on the Rent Board Fee Annual Notice sent to the mailing address on file for your property. If you need a new PIN to be issued or need other assistance, please call 311.



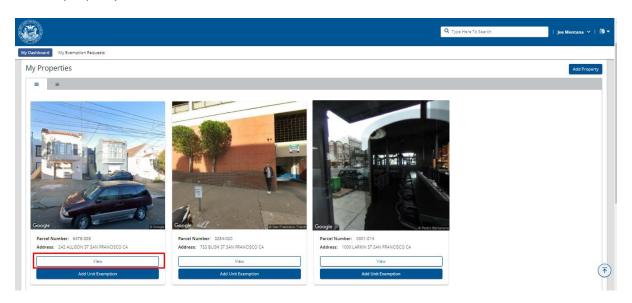




Click "Add Property"



 You will be taken to your dashboard where you will see your successfully added property



3. View Property Details Page

- On the property, click the "VIEW" button
- Scroll through the page and view property information

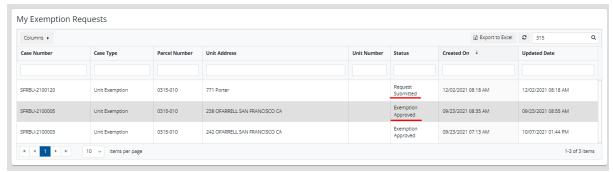
4. View details and track status of the submitted exemption request

From dashboard, click on "My Exemption Requests" located at the top near the "My Dashboard" tab

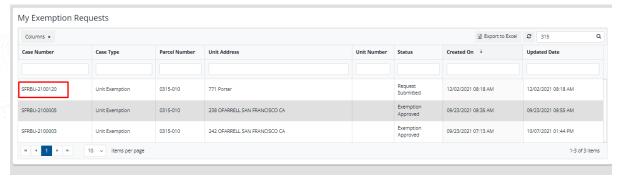




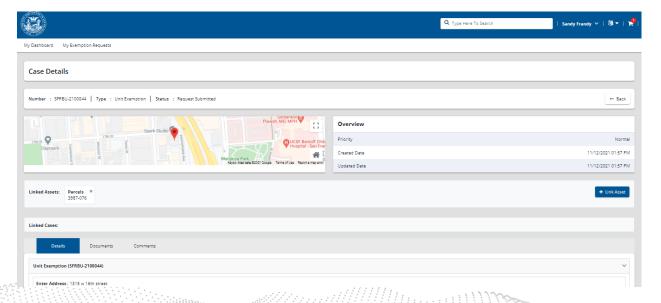
• "My Exemption Requests" grid will show all the parcels for which you filed an exemption against, their details and the status.



- Here you can sort each column by clicking on it and you could view all your requests.
- To see more details about each parcel, click on the case number in the grid to be taken to the details screen



• The case details screen looks as such:



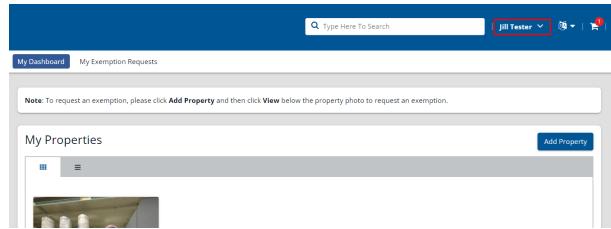
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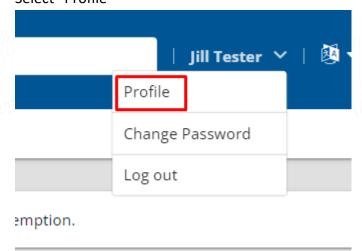
• Scroll through the page to see details including case number, type and status, linked assets, map location of property, details, documents, and comments against the case.

5. Updating Contact Information

• From the dashboard click on your name in the top right hand corner

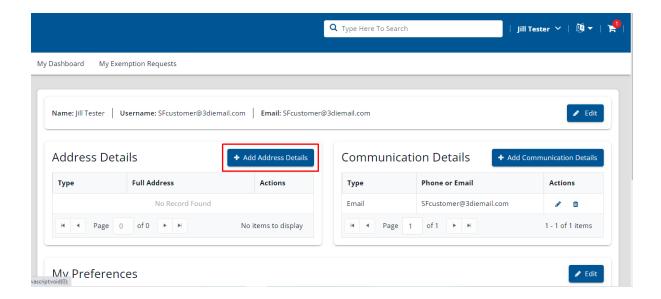


• Select "Profile"

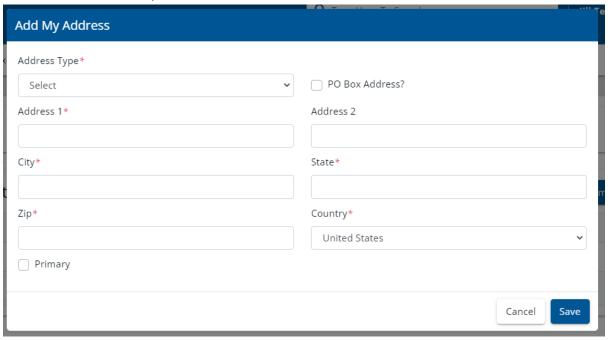


• Click on "add address details" to update personal address information



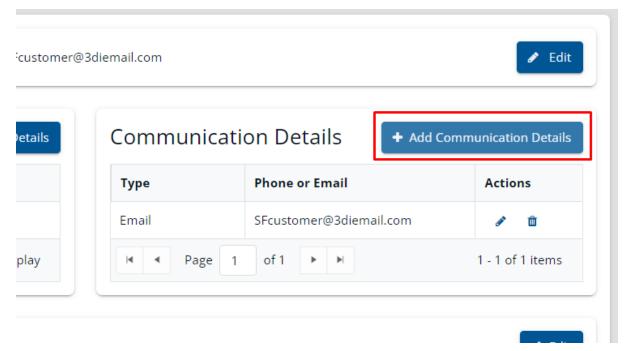


Fill in the fields to add your address details

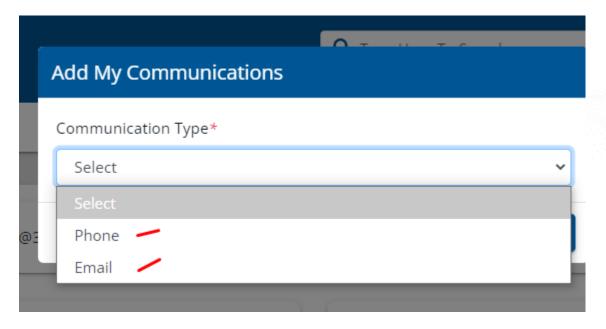


- Click save and you will see the added address in the widget
- To update email address, click on "add communication details"



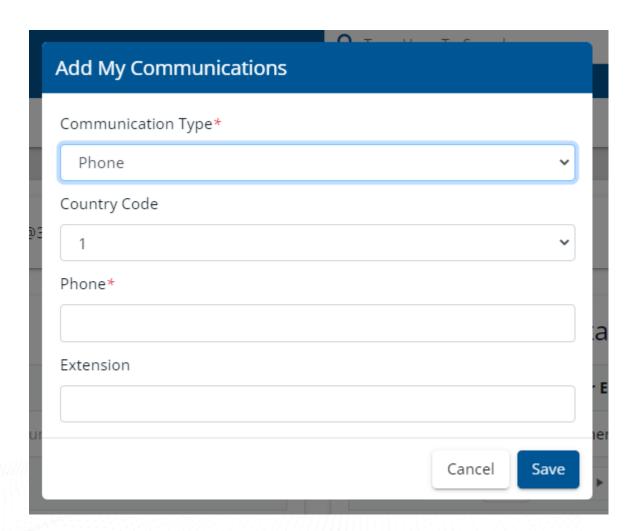


• In the pop-up select if you want to update email or phone

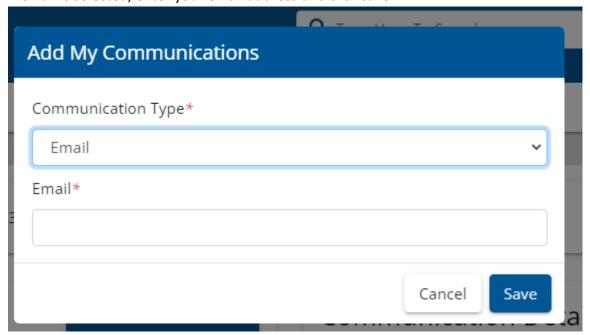


• If phone is selected, enter the following details and click save.



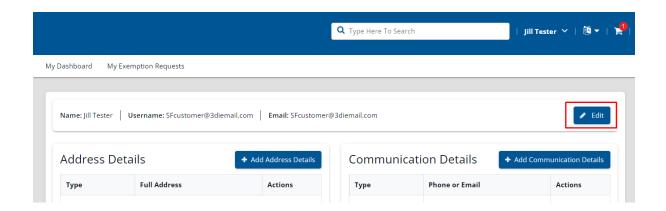


• If email is selected, enter your email address and click save

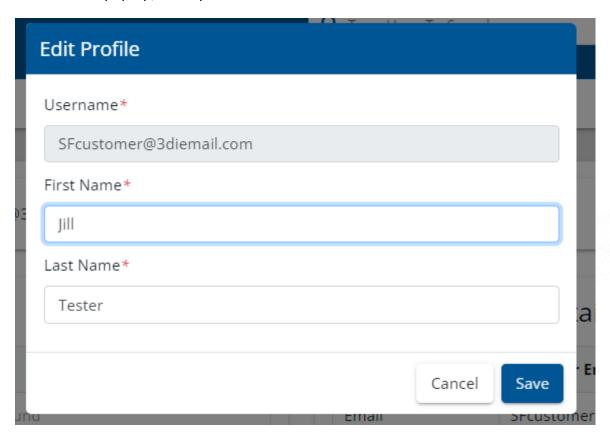


• If you need to edit first and last name, use the "edit" button





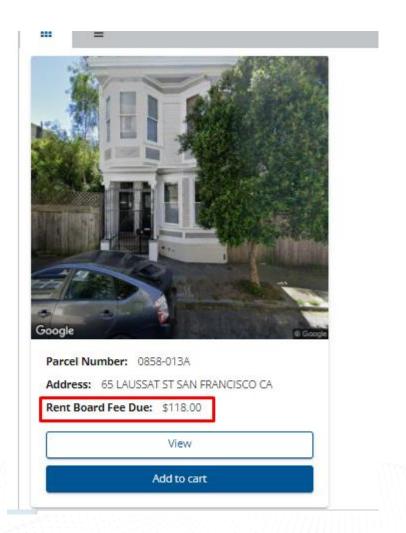
• In the pop-up, enter your first and last name and click save



6. Viewing a Payment Obligation

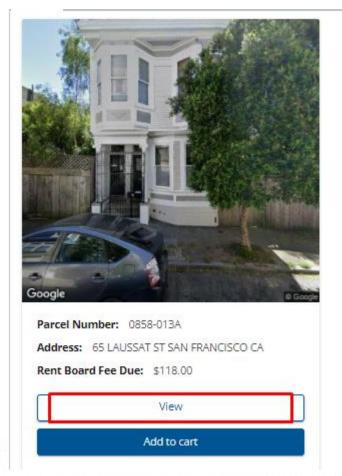
 From the customer dashboard, look at the added parcel and see the Rent Board fee listed





To see more detailed information, click "View"





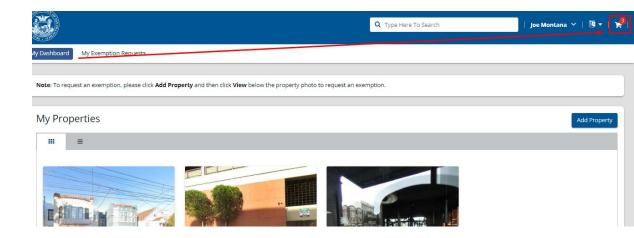
• About half way down the page, see the section with the fee information

Rent Board Assessed Fee (21-22)
Rent Board Assessed Fee : \$118.00
Due Date : 03/01/2022
Amount Paid : \$0.00
Payment Date :

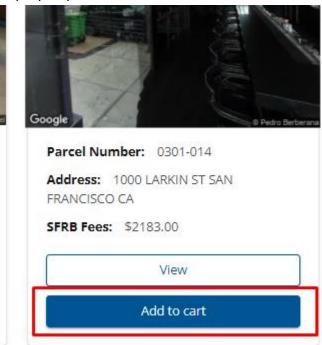
7. Add to Cart

- From your dashboard, see the added property
- Look at the shopping cart located at the top right hand side
- By default, if fees are applied to your added properties, then they will appear in the cart

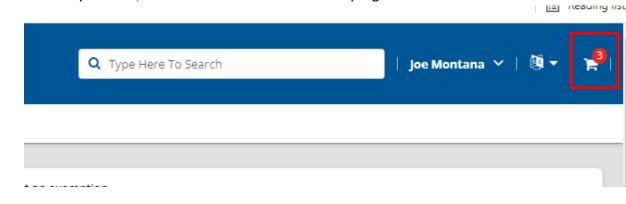




• If you do not see the property in your cart, you can click on "Add to Cart" from the property card



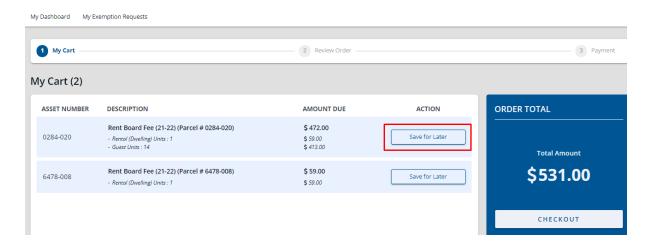
• To view your cart, click on the "cart" icon at the top right hand side.





8. Remove From Cart

 Once you are in your cart, you have the ability to remove a parcel from your cart



• Once you click on "save for later", the parcel is removed from your cart and is added into a "save for later" bin.

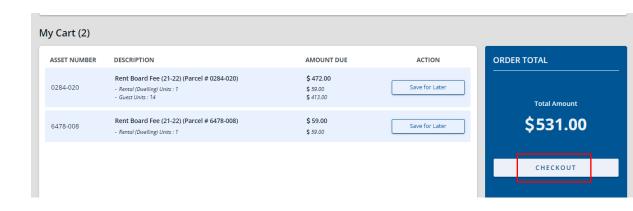


When in the "save for later" bin, you can use the "Add to Cart" button to move
it back to your cart



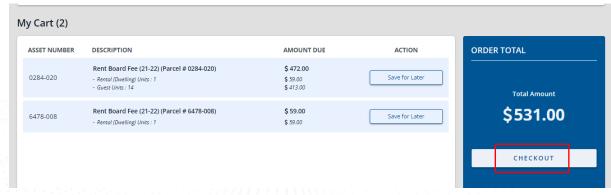
• You will see the parcels and amounts in the cart and could click on "Checkout" to proceed with payment.



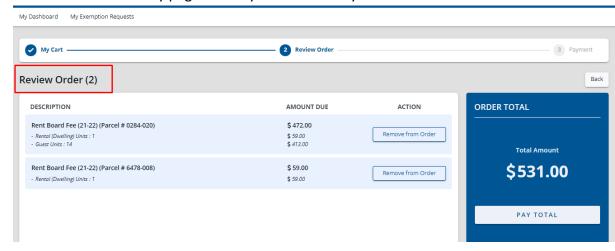


9. Checkout Process

• From your cart, you click "Checkout" to proceed with payment

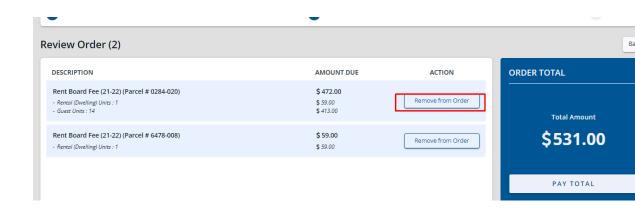


You will see a summary page where you can review your order

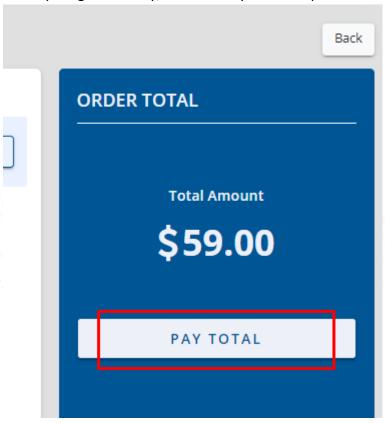


 From here, you could remove a parcel from the order if you desire to do so by clicking on "Remove from Order"

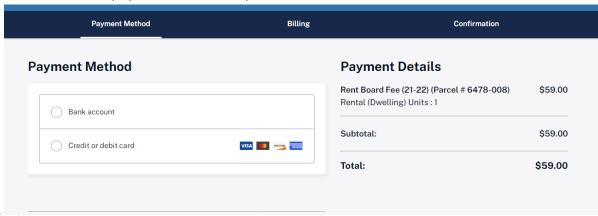




If everything looks okay, click on "Pay Total" to proceed



You will select a payment method to proceed



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- You can pay with a credit or debit card or bank account
- For bank account, you will need to accurately enter the following information:

Name on bank account

Routing number

Confirm routing number

Account number

Confirm account number

What is this?
What is this?

• For Credit/Debit card, you will need to enter the following information:

Name on Card

Credit card number

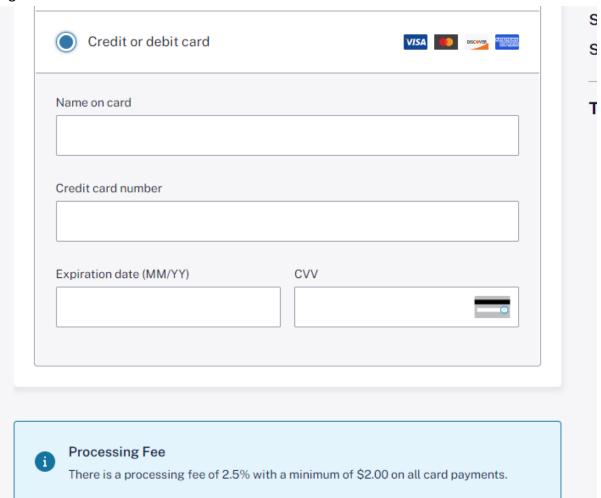
Expiration date

CVV code



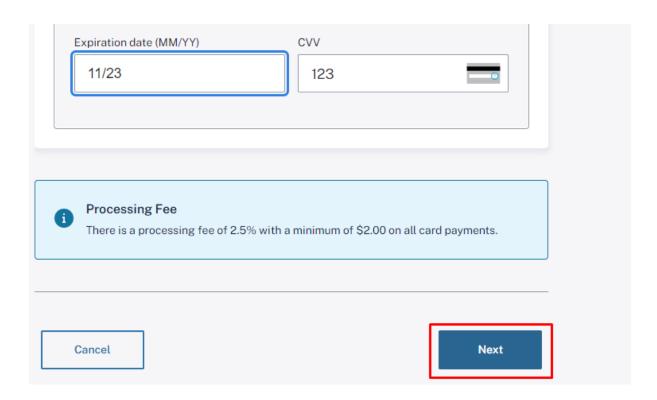


NOTE: All credit/debit card payments have a processing fee of 2.5% or \$2, whichever is greater



 Once all the information is entered (for bank account or credit/debit payment), click "Next".





• You will then need to enter customer billing information including:

Country

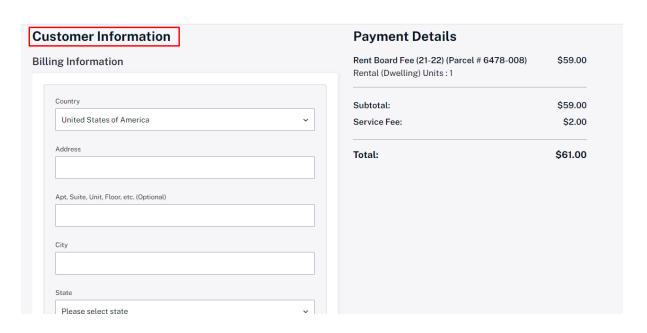
Address

Apt, Suite, Unit, Floor, etc. (optional)

City

State

Zip code

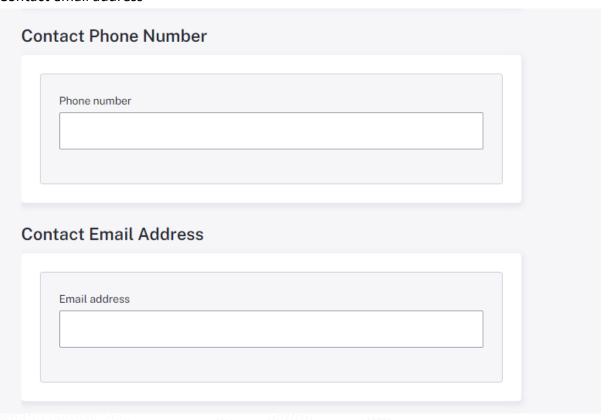


Below the address information, you will enter contact information including:
 Contact phone number

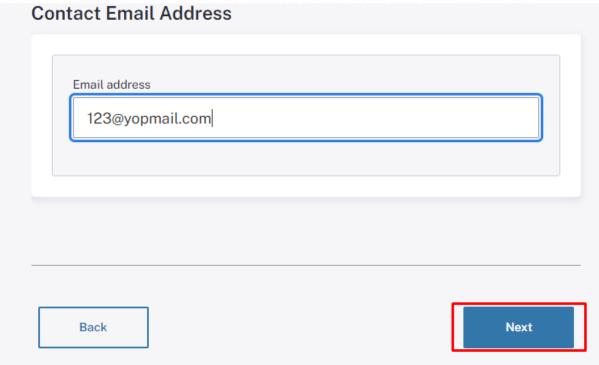
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Contact email address



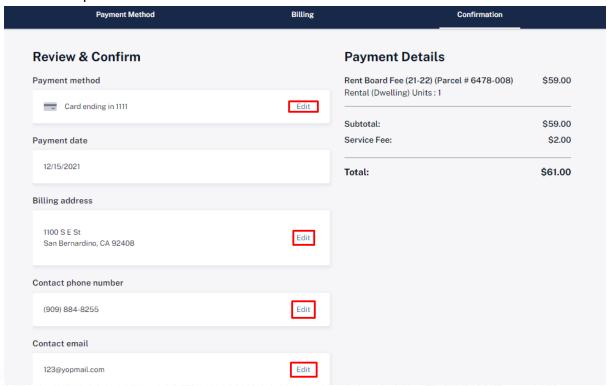
• Once you enter the contact information, click "Next" at the bottom of the screen





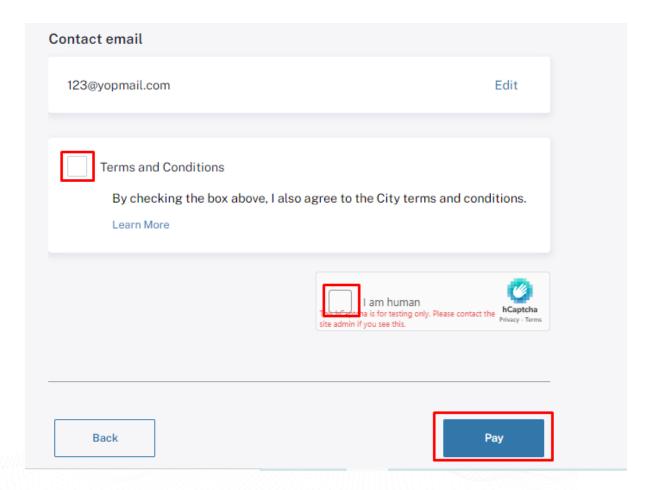


• You will see a confirmation page where you could review all your information. When reviewing your information, if you need to edit any of the fields, you could click on "Edit" and update the information



 If everything looks accurate, scroll to the bottom of the page and check the box for the terms and conditions and verify that you are human by checking the captcha box





- Once you have checked the boxes, click "Pay"
- You payment has been made and you will see a confirmation screen as such:



Thank you for your payment!

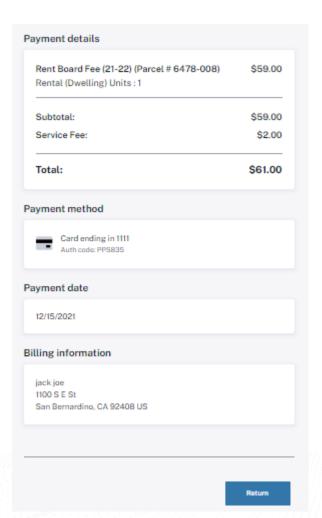
Your transaction number is 70014655.

We've sent a confirmation email to rbaharian@gmail.com. If you do not receive a receipt, check your spam folder.

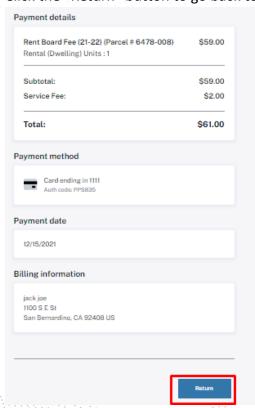
Please contact customer service at 311 or (415) 701-2311 from outside of San Francisco if you have questions about your payment.

 You could scroll down and see the payment details, parcel information, payment method, payment date and billing information





• Click the "Return" button to go back to home page





- Clicking "Return" will take you to a screen that verifies that your payment was successful.
- From here, you could click on "Go to Dashboard" to be taken back to dashboard

Payment Successful!

Thank you for your payment.

Go to Dashboard

10. Submit housing inventory information

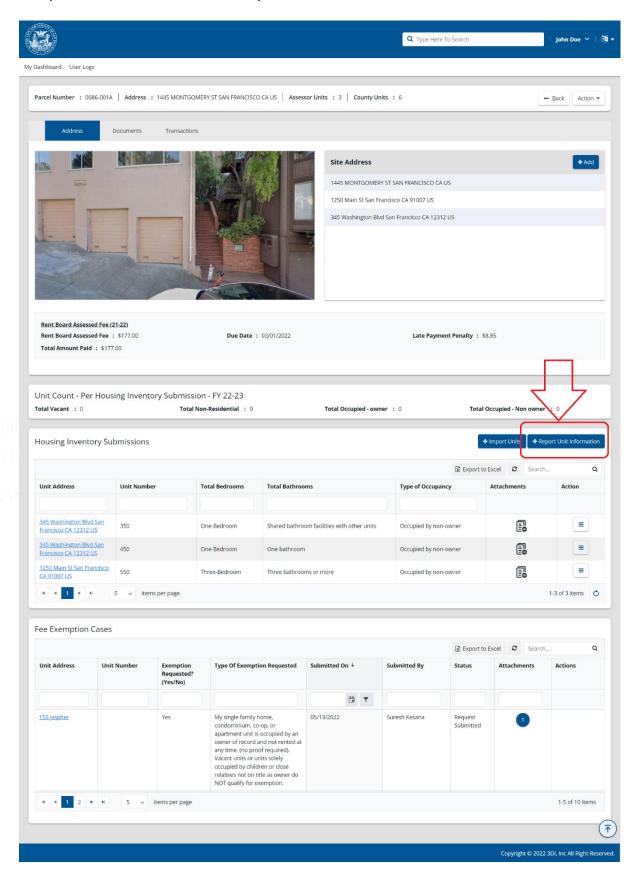
For properties subject to Rent Ordinance, Report information about the Units of the property owned or managed by individuals. Owners of properties with 10 or more Units must report the information with Rent Board by **July 1**st **2022.**

- Login to SFRB online portal and access your dashboard
- Property may have already added in user's profile when user made online payment of Rent board fee earlier this year. If not, refer to steps provided in section <u>1</u> and <u>2</u>.
- On the dashboard- widget of added property, click the "VIEW" button



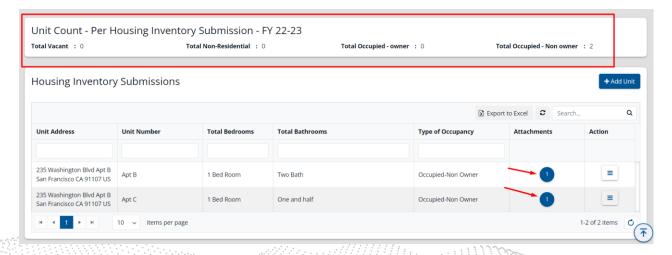


10.1 Report Unit information - Individually





- Scroll through the property details. In the Housing Inventory information section/ table, click on 'Report Unit information' button.
- First, identify the mailing address of the unit for which they intend to report.
- Second, the choose one of these options, the unit is either "Occupied by owner" or "Occupied by Non-Owner" or "Vacant" or "Non-Residential". The term owner-occupied means "a unit which is occupied by an owner of record on either a fulltime or part-time basis and is not rented at any time".
- If "Occupied by owner" is selected, provide your name and acknowledge the choice under "penalty of perjury" by selecting "confirm". You will not be prompted to report any additional information about the unit.
- If "Occupied by non-owner" is selected, additional fields will appear that require you to report the following additional information.
 - The number of bedrooms and bathrooms in the unit.
 - The approximate square footage of the unit, to the best of your knowledge by selecting drop-down menu square foot ranges to select from (e.g. 0-250 sq/ft; 251-500 sq/ft; 501-750 sq/ft; etc).
 - Whether the unit is vacant or occupied, and the date the vacancy or occupancy commenced.
 - The start and end dates of any other vacancies or occupancies during the past twelve months.
 - If the unit is tenant-occupied, the base rent must be reported in \$250 increments, and the owner must also state whether the rent includes any specified utilities (water, garbage, gas, electricity, etc.)
 - The name and business contact information (address, phone number, email address) of the owner(s), or of the property manager, if any, designated by the owner(s) to address habitability issues. Note: This contact selected for one or more units of the property if same person is responsible for those units.
- Upon successful submission of housing inventory information for each unit of the property system generates license for units that are occupied by tenants. To view / download the license generated, click on link in 'attachment' column of the grid as shown below.
- The summary of housing units submitted by category is also displayed in property details page upon submission of Housing inventory information.

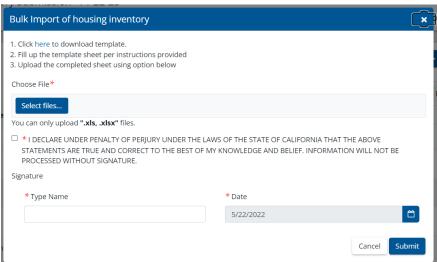




10.2 Import Units

You can import unit information in bulk using 'Import Units' option. The template for importing the information is attached below. Upon providing information in import unit pop-up(displayed below) and uploading the filled import excel sheet, system will process it, creates unit information and displays in the Housing inventory submission grid.







10.3 View Unit Details

Navigate to unit details screen by clicking on the unit address hyperlink on the housing inventory submission grid. On the unit details page, staff can view occupancy information, comments by residents on housing inventory submission, if any.

