



CITY OF SAN FRANCISCO – USER INSTRUCTION MANUAL

Version 1.0

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1. Introduction

The purpose of this document is to explain the functionality of the SFO Rent Board portal for City the San Francisco. This document will provide details on adding properties, creating exemption requests, uploading documents, and tracking exemption requests.

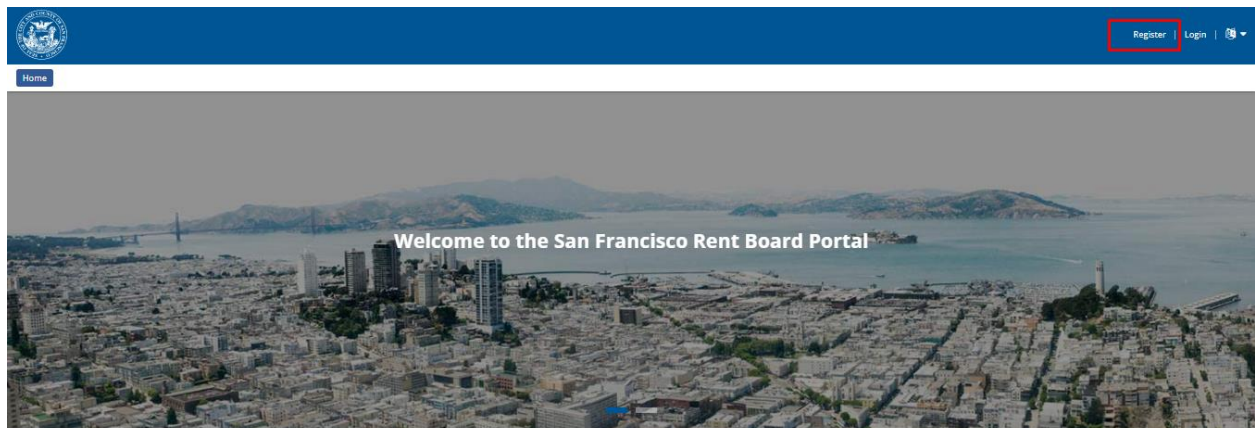
2. Customer Functions

Following are the Customer User functions

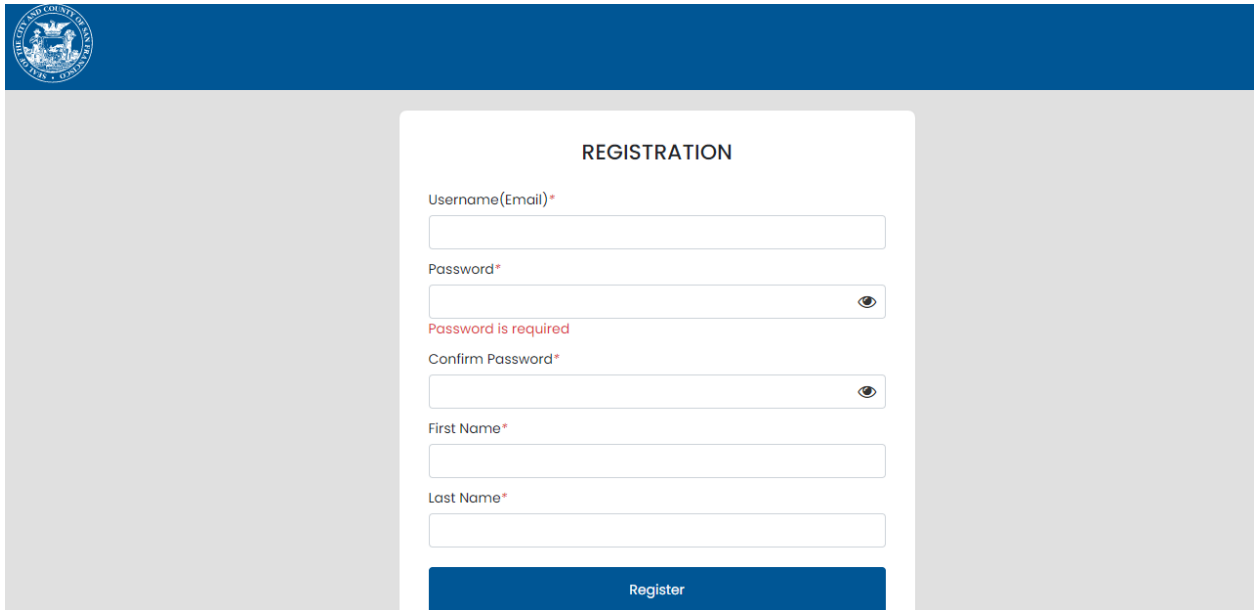
- Register
- Add a property
- Submit an exemption request
 - Upload documents (if applicable)
- View details and track status of the submitted exemption request

2.1 Register

When a customer is registering for the first time, they need to first access portal.sfrb.org where they will see the landing page as such:



User is to click on the “Register” button located at the top right hand side. Once they click on “Register”, they will be redirected to a registration page as such where all fields are mandatory.

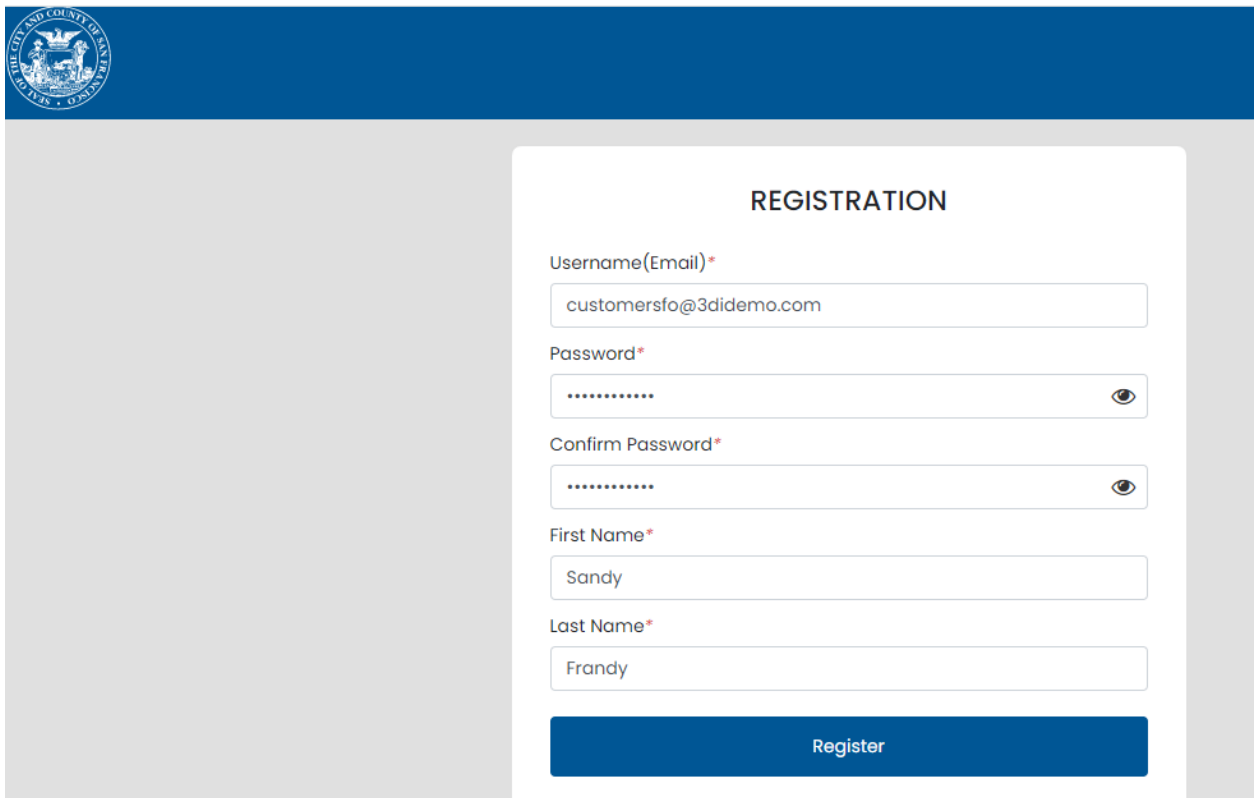


The screenshot shows the registration form with the following fields and labels:

- Username(Email)***: An empty text input field.
- Password***: An empty password input field with a toggle icon on the right.
- Confirm Password***: An empty password input field with a toggle icon on the right.
- First Name***: An empty text input field.
- Last Name***: An empty text input field.

A red error message "Password is required" is displayed below the Password field. A blue "Register" button is at the bottom.

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 (!@#%&*). Once all the information is input, user will click on “Register”.

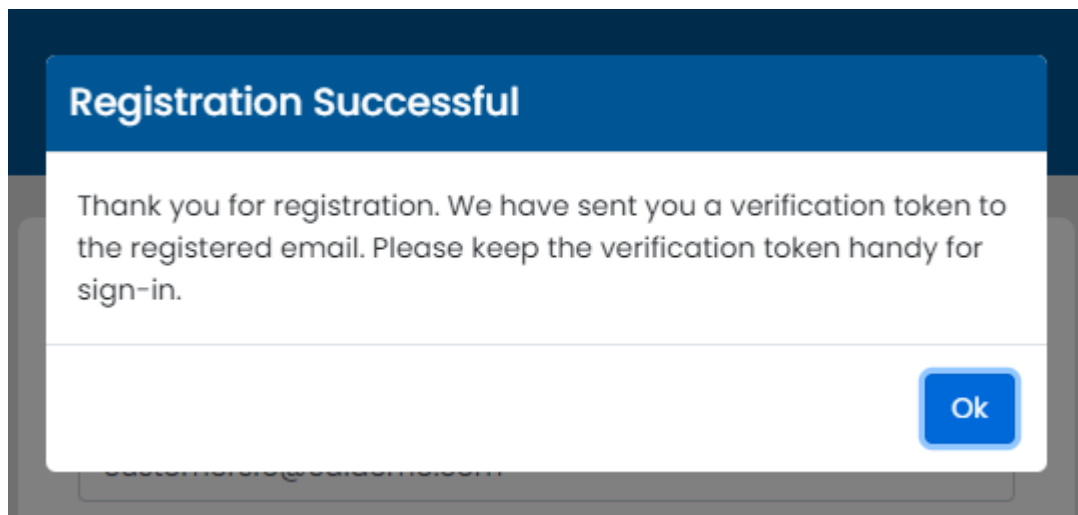


The screenshot shows the registration form with the following fields and labels:

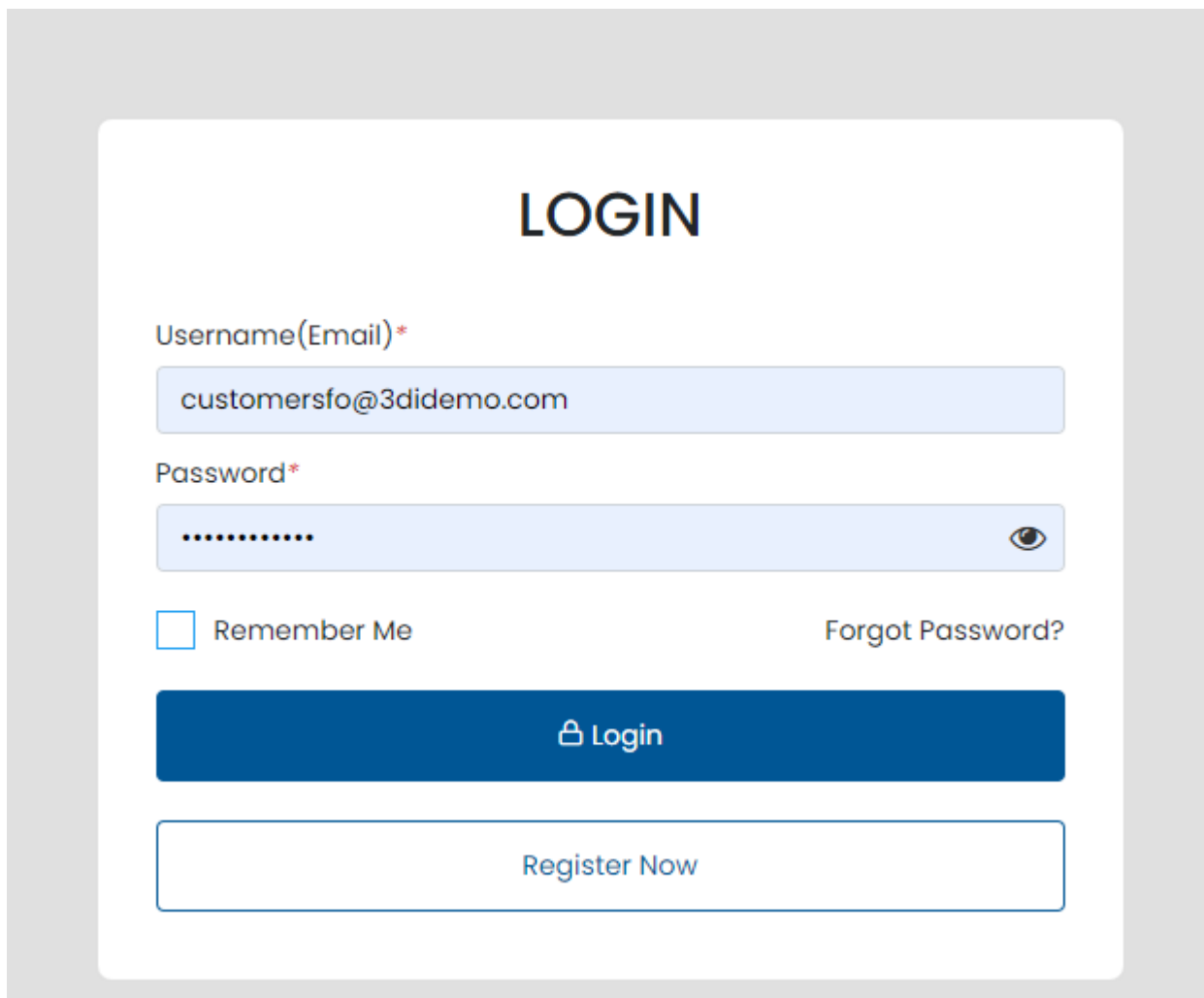
- Username(Email)***: A text input field containing "customersfo@3didemo.com".
- Password***: A password input field filled with dots, with a toggle icon on the right.
- Confirm Password***: A password input field filled with dots, with a toggle icon on the right.
- First Name***: A text input field containing "Sandy".
- Last Name***: A text input field containing "Frandy".

A blue "Register" button is at the bottom.

Upon clicking on “Register”, customer will be told that their registration was successful and that they need to go to their email inbox and retrieve a verification token.



After clicking "Ok", user will be redirected to the login page where they input their credentials.

A screenshot of a web application showing a login page. The page has a light gray background. In the center is a white card with the title "LOGIN" in large, bold, black letters. Below the title are two input fields. The first is labeled "Username(Email)*" and contains the text "customersfo@3didemo.com". The second is labeled "Password*" and contains a series of dots, with an eye icon to its right. Below the password field is a checkbox labeled "Remember Me" and a link labeled "Forgot Password?". At the bottom of the card are two buttons: a blue button labeled "Login" with a lock icon, and a white button labeled "Register Now" with a blue border.

Once credentials are input, user clicks on "login" to be directed to the token page where they verify their email.

VERIFY EMAIL

Enter validation token*

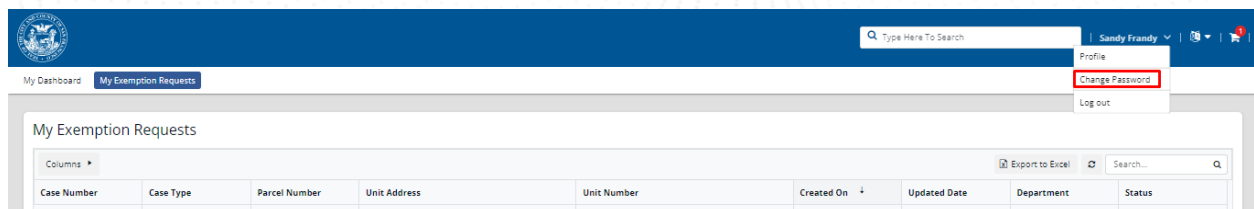
Submit

Cancel

If you didn't get the token or if the token is expired then [click here to resend](#)

User then inputs their token from the verification email. If user did not receive an email, they could click on the blue hyperlink that reads, “click here to resend “and check the email that they registered with again. Once token is received and input, click “Submit” and the customer is registered.

Once user is registered, they could always change their password by using the “change password” option located in the top right hand side of the header under their profile name.



If user wants to view their profile, they can do so by clicking on “profile” under the same menu.



In the profile page, users can update contact and address information.

2.2 Add a property

Once user successfully logs in, system will direct customer to their “dashboard” page.

The dashboard shows two main sections. The top section, 'My Properties', includes an 'Add Property' button. The bottom section, 'My Unit Exemption Requests', displays a table with columns: Case Number, Case Type, Parcel Number, Unit Address, Unit Number, Created On, Updated Date, Department, and Status. The table is currently empty, showing 'No Record Found'.

By default, dashboard page has 2 widgets. At the top, the “My Properties” widget sits where users can add properties and view properties. And the bottom widget is “My Unit Exemption Requests” where users can view their submitted exemption requests.

In the “My Properties” widget, there is a button called, “Add Property”. This is how a customer will add their property to their profile.

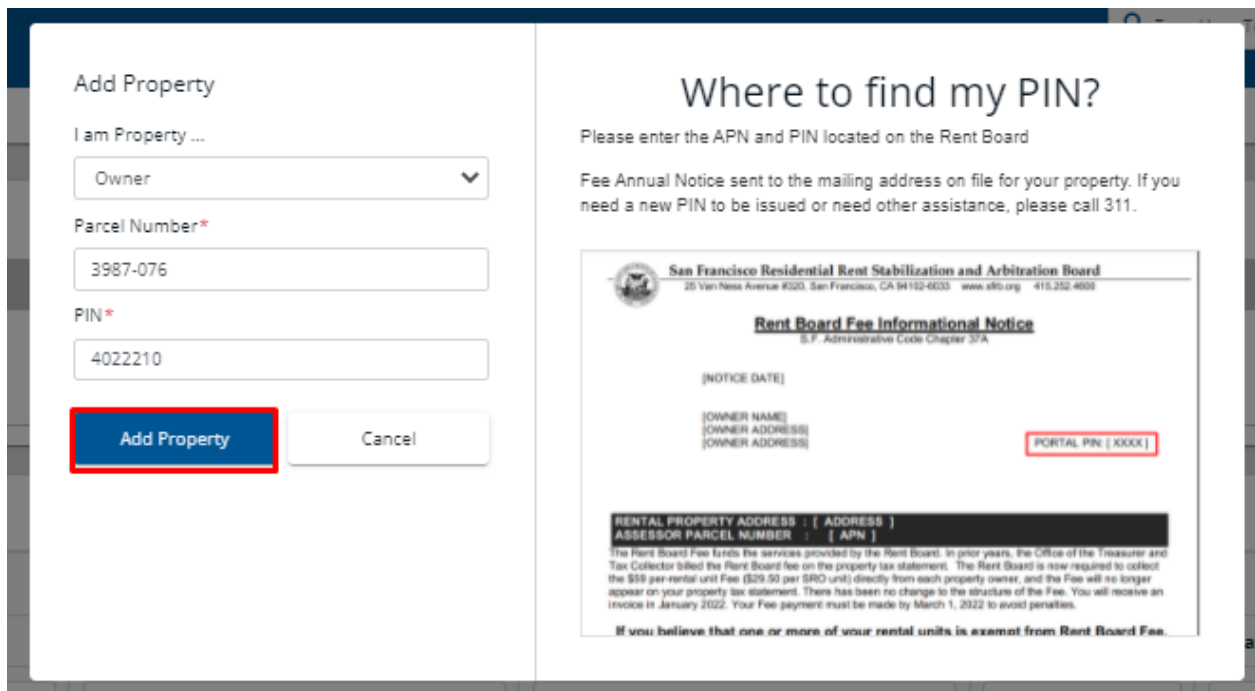
This screenshot shows the 'My Properties' widget with the 'Add Property' button highlighted by a red box. The 'My Unit Exemption Requests' widget is visible below it.

When user clicks on “Add Property”, they will see a pop-up where they need to signify their role, input their parcel number and input their PIN.

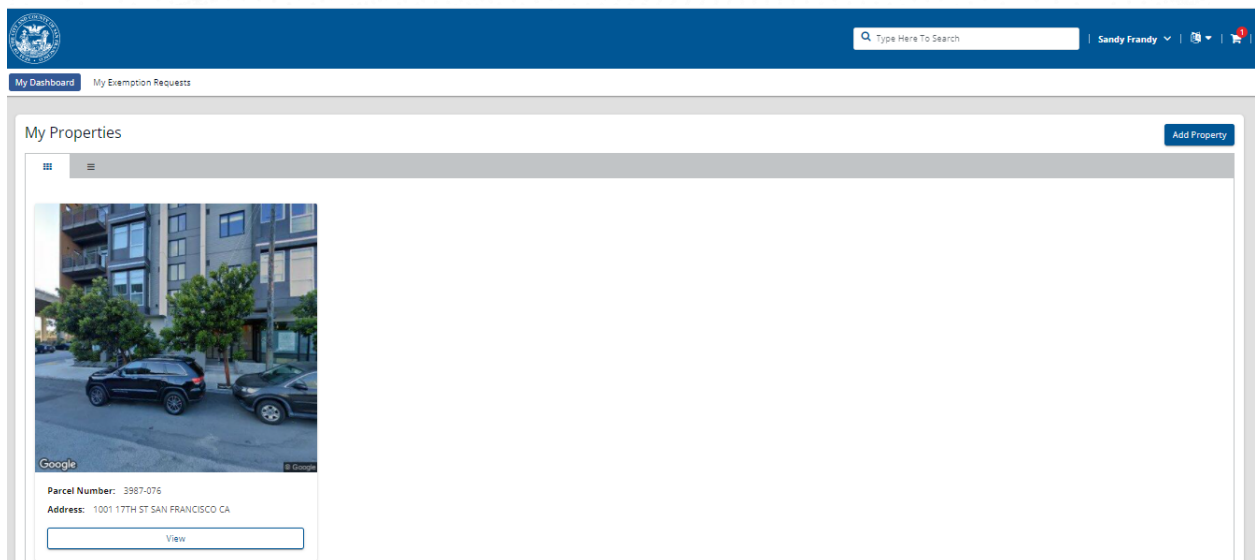
The 'Add Property' pop-up form has two panels. The left panel contains a dropdown menu for 'I am Property ...' with 'Owner' selected, followed by input fields for 'Parcel Number*' and 'PIN*'. At the bottom are 'Add Property' and 'Cancel' buttons. The right panel is titled 'Where to find my PIN?' and provides instructions on how to find the PIN. It includes a sample 'Rent Board Fee Informational Notice' document from the San Francisco Residential Rent Stabilization and Arbitration Board, which shows fields for (NOTICE DATE), (OWNER NAME), (OWNER ADDRESS), (PORTAL PIN [XXXX]), (RENTAL PROPERTY ADDRESS), and (ASSESSOR PARCEL NUMBER).

On the right side of the pop-up, user will see instructions as to where to find their PIN which is located on the “Rent Board Fee Informational Notice”.

Once user inputs all the information, they click “Add Property”.



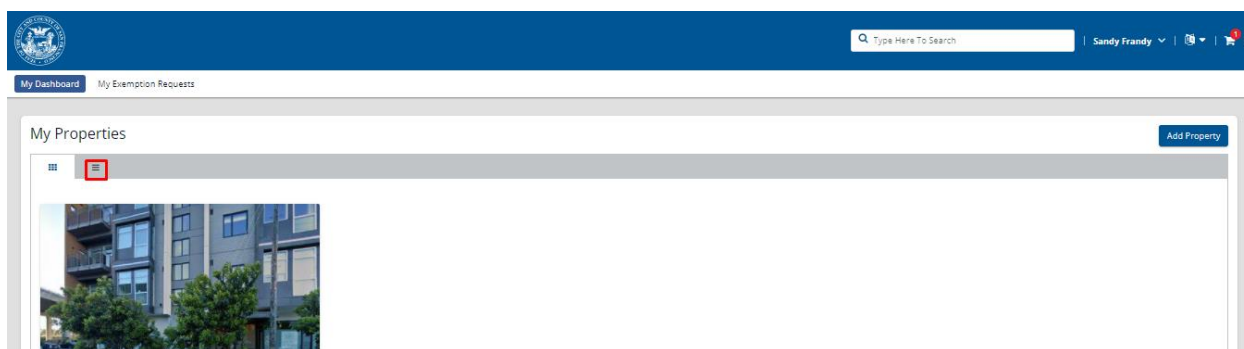
Once user clicks on “Add Property”, system will display a message that reads, “Files uploaded successfully” and will direct user to the Dashboard with the added property displayed.



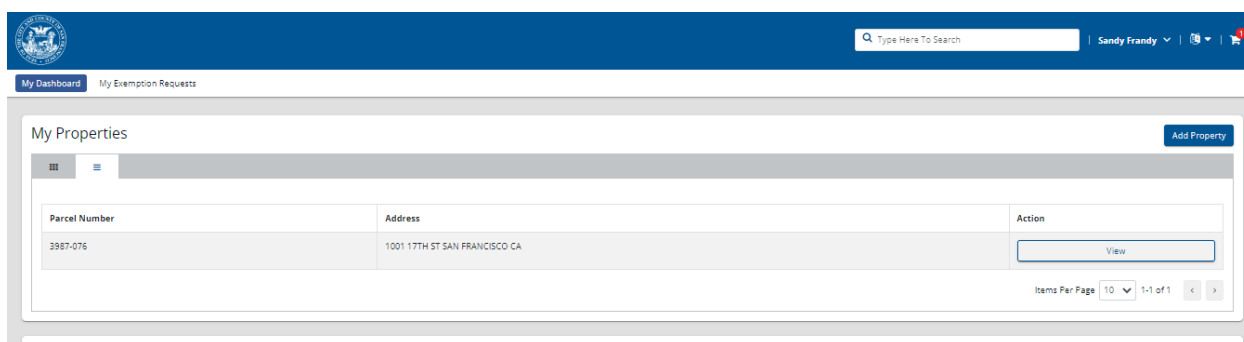
Now if user looks at the “My Properties” widget, they will see the added property.

2.3 View Property Details Page

Dashboard by default will display the added property in a card style. In order to view the added property in a “list” style, user needs to click on the 3 lines in the grey bar under the “My Properties” title.

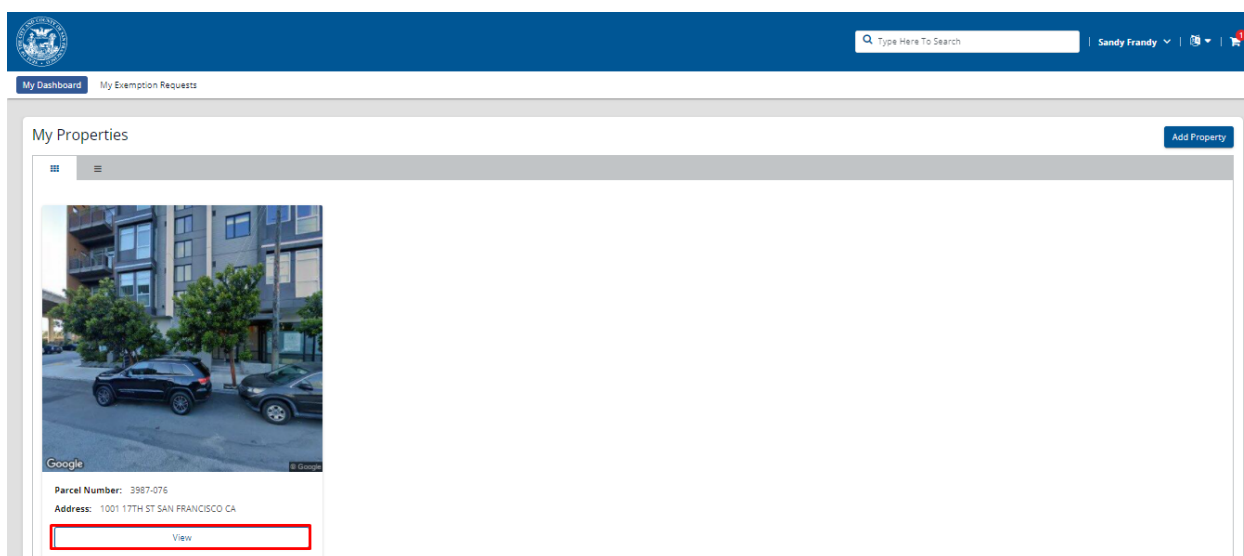


Once user clicks on the 3 bars, the dashboard will display a list view.



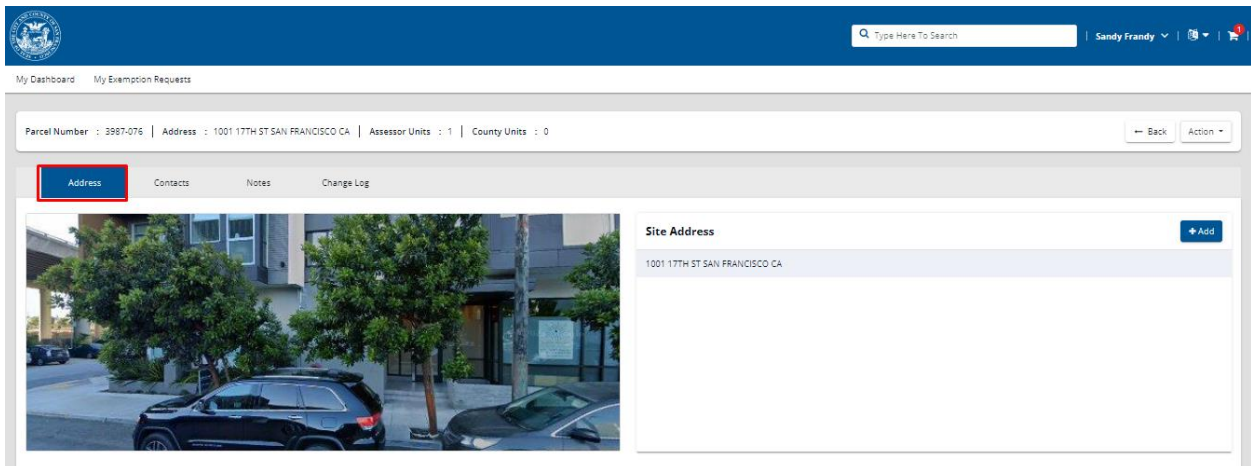
This is solely a preference and all the same actions can be taken whether from the card or list view.

In order to view the property details page, user needs to click on the “VIEW” button (from either card or list view)



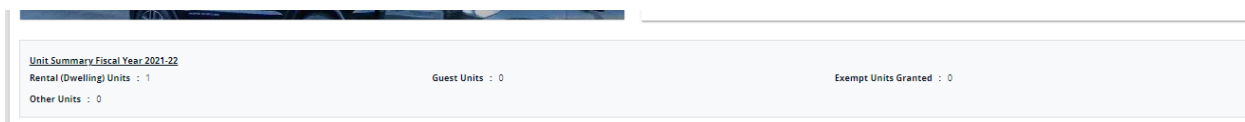
Clicking on “VIEW” will bring the user to the property details page.

For the top widget, system will default you to the address tab.



The address tab has site address information listed on the right hand side. User can add additional site addresses here if needed by clicking on “+ ADD” located at the top right hand side and entering in the site information. Once added, the additional site addresses will be listed.

The next section in the property details page shows a Unit Summary Fiscal Year



This information includes dwelling units, guest units, exempt units and other.

The section underneath is for adding units to an associated address.



User can click on “+ Add Unit” to add units to their property. User can not remove added units and if they need to, they need to contact SFO Rent Board.

When user clicks on “+ Add Unit”, they see a pop-up asking for unit information such as unit number, occupant type and number of bedrooms. If there is no unit number, user is to click on the checkbox that reads, “No unit number”.

Add New Unit

Unit Number*

☐ No Unit Number

Occupant Type
Manager

Number of Bedrooms
1

Cancel Save

Upon clicking “save” user will see the unit information displayed in the grid of that property.

Unit Summary Fiscal Year: 2021-22
Rental (Dwelling) Units : 1
Other Units : 0
Guest Units : 0
Exempt Units Granted : 0

1001 17TH ST SAN FRANCISCO CA
Add Unit

Unit Number	Occupant Type	Total Bedrooms	Actions
1	Manager	1	

123 main San Bernardino California 92408
Add Unit

The last widget on the page is for submitting an exemption request which will be covered in section 2.4.

Back to the top of the property details page, we have a “contacts” tab. When user selects the “contacts” tab, they will see a contacts widget.

Parcel Number : 3987-076 | Address : 1001 17TH ST SAN FRANCISCO CA | Assessor Units : 1 | County Units : 2
Back Action

Address Contacts Notes Change Log

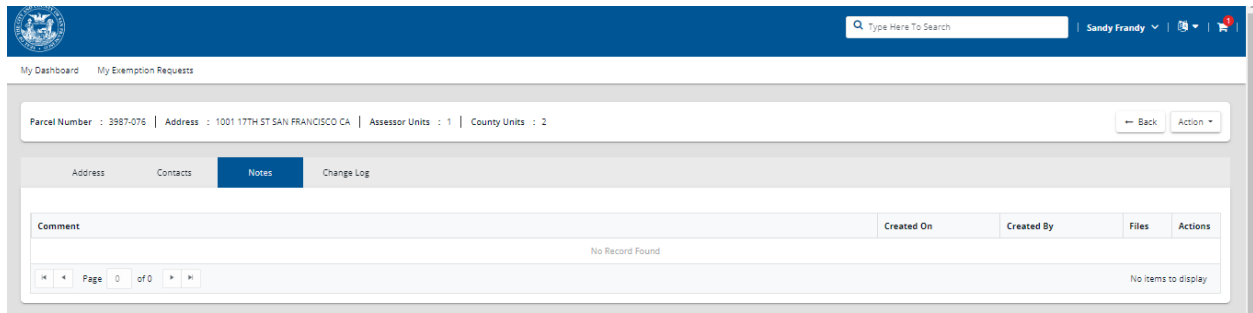
Association Contact Type	Contact Type	Name	Address	Phone Number	Email	Company	Actions
Owner		Sandy Frandy			customersrfo@3diemail.com		
Owner	Individual	SPROUSE SAMSON	1001 17TH ST UNIT 406 SAN FRANCISCO CA 94102				

Here users can see the contacts associated with the property.

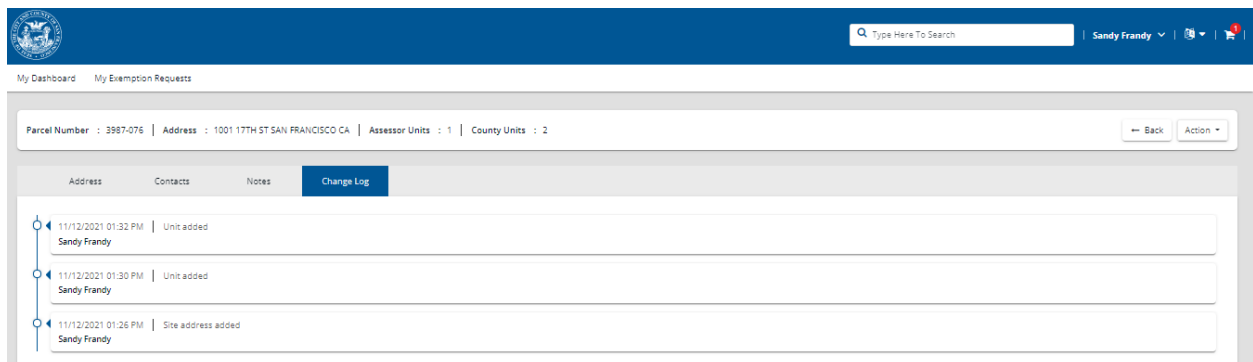
Address Contacts Notes Change Log

Association Contact Type	Contact Type	Name	Address	Phone Number	Email	Company	Actions
Owner		Sandy Frandy			customersrfo@3diemail.com		
Owner	Individual	SPROUSE SAMSON	1001 17TH ST UNIT 406 SAN FRANCISCO CA 94102				

The next tab is “notes”. If there are any notes associated with the property, user will be able to view them here.

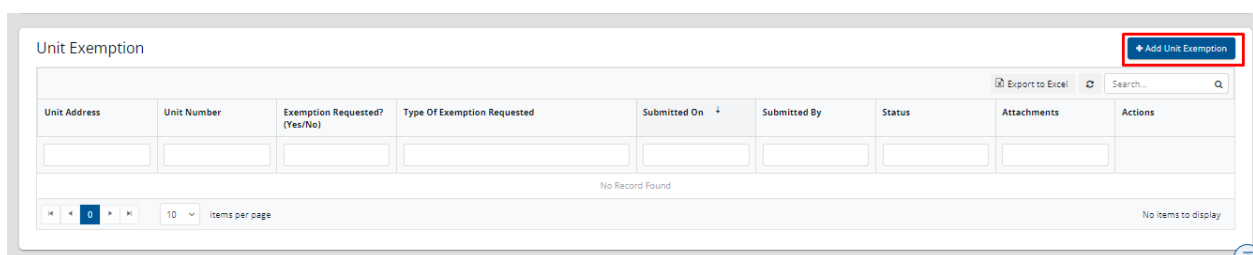


Lastly is a “change log” where user can view actions that push workflows.



2.4 Submit exemption request

In order for a user to submit an exemption request, they need to go to the property details page and scroll down to the bottom to the widget titled “Unit Exemption”. This widget has a grid that will hold all submitted exemption requests and well as a button for adding unit exemptions as highlighted below.



When user clicks on “Add Unit Exemption”, they will see a pop-up.

Add Unit Exemption

Enter Address Unit Number

*** Select one exemption type**

- ☐ My single family home, condominium, co-op, or apartment unit is occupied by an owner of record and not rented at any time. (no proof required). Vacant units or units solely occupied by children or close relatives not on title as owner do NOT qualify for exemption. 您的單一家庭住宅、共管式公寓、合作社房屋或公寓單位由留駐在內的業主住用，並且從未出租。(無需證明)或空置單位或僅由無業主名義的子女或親屬使用的單位，並不符合豁免條件。 Mi vivienda unifamiliar, condominio, unidad de cooperativa o apartamento está habitado/a por un propietario registrado en el título de la propiedad y no se ha alquilado en ningún momento (no se requiere prueba) o Las unidades desocupadas o aquellas exclusivamente ocupadas por hijos o parientes cercanos que no figuren en el título de propiedad como propietario NO califican para una exención.
- ☐ The rent for the unit is controlled or regulated by a government unit, agency, or authority (other than the San Francisco Rent Board), for example, Section 8. You must submit documentation from that governmental agency showing regulation of rents. 單位的租金由政府部門、機構或主管機關(三藩市租務委員會除外)控制或監管，例如：第8號。您必須提交由政府機關發出的文件，證明租金受監管。 La renta correspondiente a la unidad está controlada o regulada por una unidad, agencia o autoridad del gobierno (distinta de la Junta del Control de Rentas) por ejemplo, la Sección 8. Debe presentarse documentación de esa agencia del gobierno que demuestre la regulación de las rentas.
- ☐ The hotel guest room is not rented for residential use and is designed for tourist use under the Residential Hotel Ordinance. You must submit the most current Certificate of Use for the Department of Building Inspection's Housing Inspection Division. 出租的酒店房間並非住宅用途，而是根據《住宅酒店條例》供遊客使用。您必須向建築檢查部的房屋檢查處提交最新的《使用證明書》(Certificate of Use)。 La habitación de huéspedes de hotel no se alquila para uso residencial y está destinada a uso de turistas de acuerdo con la Ordenanza de Hoteles Residenciales. Debe presentarse el Certificado de uso más actualizado para la División de Inspección de Viviendas del Departamento de Inspección de Edificios.
- ☐ The unit is a housing accommodation in a hospital, monastery, extended care facility, state licensed home for the elderly, or a dormitory owned and operated by an institution of higher education, a high school or an elementary school. You must submit a Department of Social Services Certificate. 單位是醫院、修道院、擴展護理機構、國家許可老人院內的住房，或由高等教育機構、高中或小學擁有和運營的宿舍。您必須提交《社會服務處證明書》。 La unidad es un alojamiento en un hospital, monasterio, centro de cuidados extendidos, hogar para ancianos con licencia estatal o un dormitorio que pertenece y es operado por una institución de educación superior, una escuela secundaria o una escuela primaria. Debe presentarse un certificado del Departamento de Servicios Sociales.
- ☐ The unit is a non-profit cooperative owned, occupied, and controlled by a majority of the residents. You must submit a copy of the non-profit document 501(c) on file with the Secretary of State. 單位是非牟利合作住屋，由大多數居民擁有、佔用和控制。您必須向州務卿辦公室提交存檔的非牟利文件 501(c) 副本。 La unidad es una cooperativa sin fines de lucro que pertenece, es ocupada y controlada por una mayoría de los residentes. Debe presentarse una copia del documento 501(c) (entidades sin fines de lucro) presentado ante la Secretaría de Estado.

Comment

0 of 100 characters used

Documents

Select files...

Requestor Contact

Use request information from my profile ☐ Provide request details

In this pop-up, user needs to enter the full property address and unit number.

Add Unit Exemption

Enter Address Unit Number

*** Select one exemption type**

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- ☐ The hotel guest room is not rented for residential use and is designed for tourist use under the Residential Hotel Ordinance. You must submit the most current Certificate of Use for the Department of Building Inspection's Housing Inspection Division. 出租的酒店房間並非住宅用途，而是根據《住宅酒店條例》供遊客使用。您必須向建築檢查部的房屋檢查處提交最新的《使用證明書》(Certificate of Use)。 La habitación de huéspedes de hotel no se alquila para uso residencial y está destinada a uso de turistas de acuerdo con la Ordenanza de Hoteles Residenciales. Debe presentarse el Certificado de uso más actualizado para la División de Inspección de Viviendas del Departamento de Inspección de Edificios.
- ☐ The unit is a housing accommodation in a hospital, monastery, extended care facility, state licensed home for the elderly, or a dormitory owned and operated by an institution of higher education, a high school or an elementary school. You must submit a Department of Social Services Certificate. 單位是醫院、修道院、擴展護理機構、國家許可老人院內的住房，或由高等教育機構、高中或小學擁有和運營的宿舍。您必須提交《社會服務處證明書》。 La unidad es un alojamiento en un hospital, monasterio, centro de cuidados extendidos, hogar para ancianos con licencia estatal o un dormitorio que pertenece y es operado por una institución de educación superior, una escuela secundaria o una escuela primaria. Debe presentarse un certificado del Departamento de Servicios Sociales.
- ☐ The unit is a non-profit cooperative owned, occupied, and controlled by a majority of the residents. You must submit a copy of the non-profit document 501(c) on file with the Secretary of State. 單位是非牟利合作住屋，由大多數居民擁有、佔用和控制。您必須向州務卿辦公室提交存檔的非牟利文件 501(c) 副本。 La unidad es una cooperativa sin fines de lucro que pertenece, es ocupada y controlada por una mayoría de los residentes. Debe presentarse una copia del documento 501(c) (entidades sin fines de lucro) presentado ante la Secretaría de Estado.

Then user need to select one of the following reasons for filing an exemption.

*** Select one exemption type**

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Depending on the selection by the user, the document upload MAY be mandatory. Some of the options require that the user upload proof so depending on the selection, the document upload may be mandatory.

After their selection, they have an optional comment box where the user can leave a comment. Underneath the comment box, there is a document upload section.

- ☒ The unit is a housing accommodation in a hospital, monastery, extended care facility, state licensed home for the elderly, or a dormitory owned and operated by an institution of higher education, a high school or an elementary school. You must submit a Department of Social Services Certificate. 單位為醫院、修道院、擴展護理機構、國家許可老人院內的住宿、或由高等教育機構、高中或小學擁有和經營的宿舍。您必須提交《社會服務局證書》。La unidad es un alojamiento en un hospital, monasterio, centro de cuidados extendidos, hogar para ancianos con licencia estatal o un dormitorio que pertenece y es operado por una institución de educación superior, una escuela secundaria o una escuela primaria. Debe presentarse un certificado del Departamento de Servicios Sociales.
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Comment

0 of 100 characters used

Documents

Select files...

User can upload one or more documents here to support their exemption request. Allowed document types include but are not limited to, .doc, .jpeg, .pdf, .xls.

Once supporting documents are uploaded, customer will need to enter contact details.

Select files...

Requestor Contact

☒ Use contact information from my profile ☐ Provide contact details

First Name : Sandy
Last Name : Frandy
Email : customersfo@3diemail.com
Phone Number :

☐ * I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE ABOVE STATEMENTS ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF. REFUND WILL NOT BE PROCESSED WITHOUT SIGNATURE

Signature

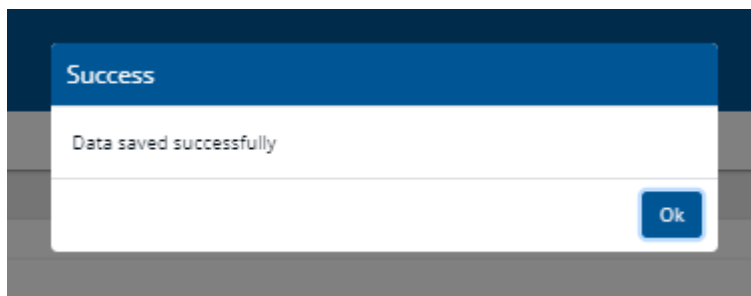
* Type Name Date

Cancel Submit

By default, the logged in member's information will display here and if user wants to provide more information they can.

Lastly, user needs to check the Penalty of Perjury, type their name and date the document.

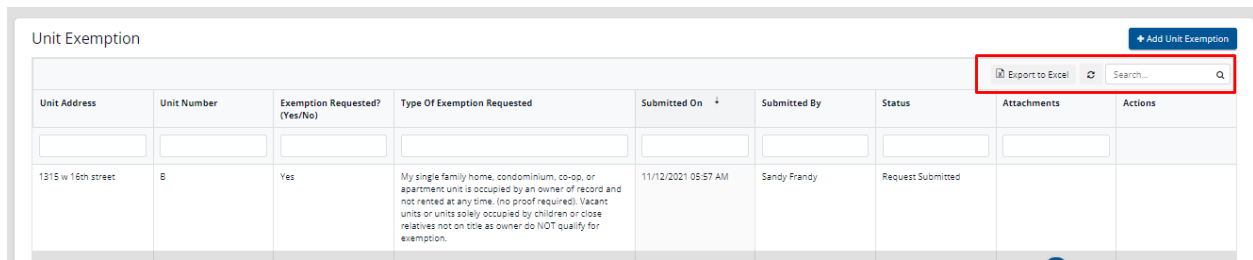
Once all the fields have been completed, user clicks on "Submit". Customer will see a small pop-up that states it has been submitted successfully.



User clicks "Ok" and system will refresh the property details page. User will scroll to the bottom to view the "Unit Exemption" widget and see their information populated in the grid.

Unit Exemption ➕ Add Unit Exemption								
Export to Excel Search...								
Unit Address	Unit Number	Exemption Requested? (Yes/No)	Type Of Exemption Requested	Submitted On	Submitted By	Status	Attachments	Actions
1315 W 16th street	B	Yes	My single family home, condominium, co-op, or apartment unit is occupied by an owner of record and not rented at any time. (no proof required). Vacant units or units solely occupied by children or close relatives not on title as owner do NOT qualify for exemption.	11/12/2021 09:57 AM	Sandy Frandy	Request Submitted		

If user has several exemption requests and would like to search against it, they could use the search bar at the top right for ease of use. Also, if the user has the need to export the list of exemptions, they can use the “export to excel” feature.



Unit Exemption

Export to Excel Search...

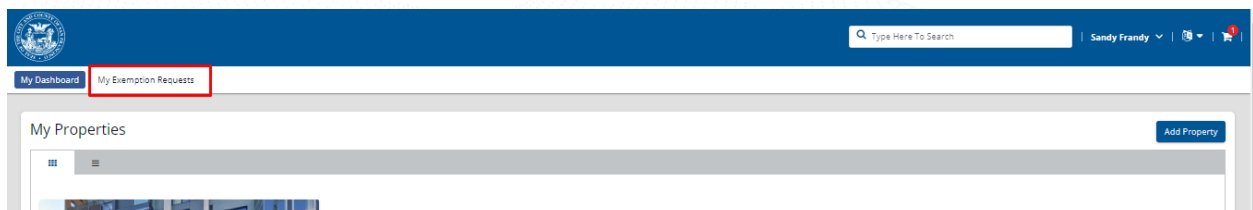
Unit Address	Unit Number	Exemption Requested? (Yes/No)	Type Of Exemption Requested	Submitted On	Submitted By	Status	Attachments	Actions
1315 w 16th street	B	Yes	My single family home, condominium, co-op, or apartment unit is occupied by an owner of record and not rented at any time. (no proof required). Vacant units or units solely occupied by children or close relatives not on title as owner do NOT qualify for exemption.	11/12/2021 09:57 AM	Sandy Frandy	Request Submitted		

Once the exemption request is submitted. SFO staff will be alerted that they have a request that needs to be reviewed.

Now, user has successfully submitted an exemption request and can return to Dashboard. In order to return to Dashboard, user can either click on the “Back” button located at the top right hand side of the property details page, or click on the “Dashboard” tab at the top left hand side of the property details page.

2.5 View details and track status of the submitted exemption request

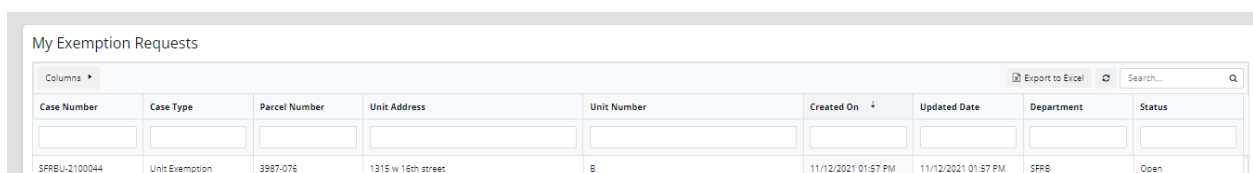
Now that the exemption request is submitted, user can view the status by clicking on the “My Exemption Requests” tab at the top of the dashboard.



My Dashboard My Exemption Requests

My Properties

Once user clicks on “My Exemption Requests”, they will see the exemptions widget with their added exemption and the details.



My Exemption Requests

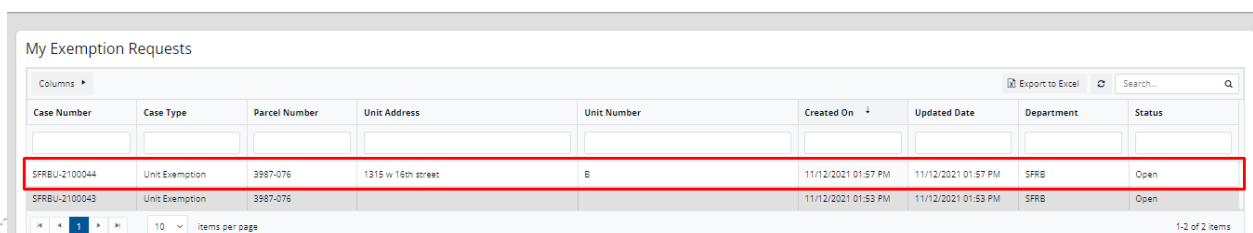
Columns

Export to Excel Search...

Case Number	Case Type	Parcel Number	Unit Address	Unit Number	Created On	Updated Date	Department	Status
SFRBU-2100044	Unit Exemption	3987-076	1315 w 16th street	B	11/12/2021 01:57 PM	11/12/2021 01:57 PM	SFRB	Open

Here, users can refer to the column titled, “status” to see the status of their case. Once a decision is made by SFO staff, the status will read either granted or denied. System will send emails to the customer along the way so they are aware of any changes to their case.

In order to see more details of the exemption request case, user can click on the line item in the grid.



My Exemption Requests

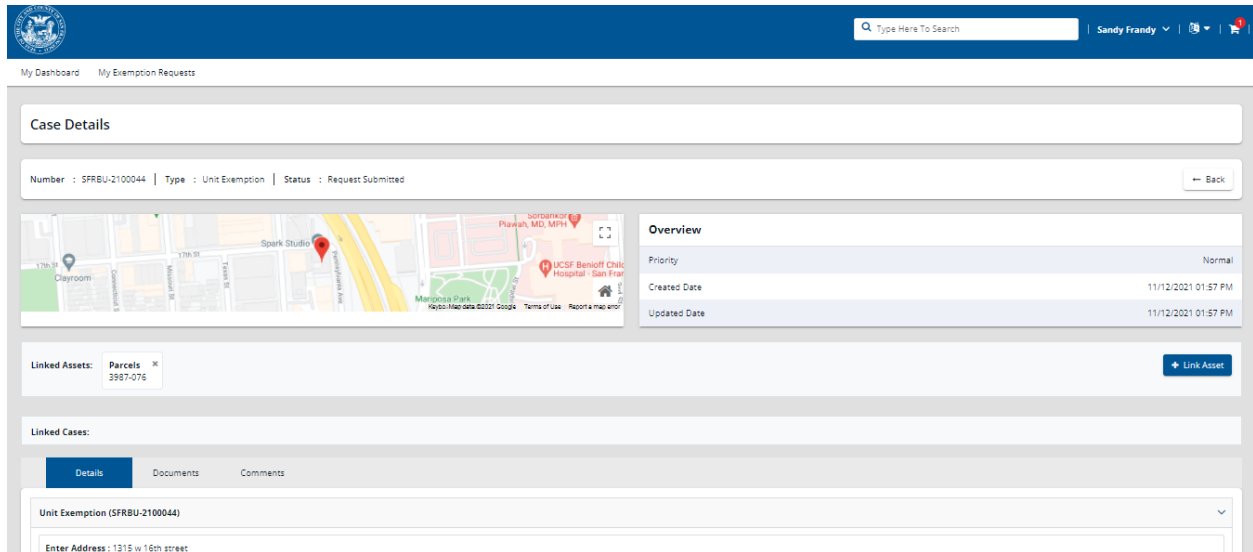
Columns

Export to Excel Search...

Case Number	Case Type	Parcel Number	Unit Address	Unit Number	Created On	Updated Date	Department	Status
SFRBU-2100044	Unit Exemption	3987-076	1315 w 16th street	B	11/12/2021 01:57 PM	11/12/2021 01:57 PM	SFRB	Open
SFRBU-2100043	Unit Exemption	3987-076			11/12/2021 01:53 PM		SFRB	Open

1-2 of 2 items

When user clicks on the case, system takes user to the case details page. Here user can see a map view of their property. An overview of information including the case number, type of case, status, date the case was created, linked parcels, and a map view of the property.



Case Details

Number : SFRBU-2100044 | Type : Unit Exemption | Status : Request Submitted [Back](#)

Overview

Priority	Normal
Created Date	11/12/2021 01:57 PM
Updated Date	11/12/2021 01:57 PM

Linked Assets: [Parcels](#) ☒ 3987-076 [Link Asset](#)

Linked Cases:

[Details](#) [Documents](#) [Comments](#)

Unit Exemption (SFRBU-2100044)

Enter Address : 1315 W 16th street

As the user scrolls down the page, they will see the exemption request details in the “details” tab.



[Details](#) [Documents](#) [Comments](#)

Unit Exemption (SFRBU-2100044)

Enter Address : 1315 W 16th street

Unit Number : B

Select one exemption type :
My single family home, condominium, co-op, or apartment unit is occupied by an owner of record and not rented at any time. (No proof required). Vacant units or units solely occupied by children or close relatives not on title as owner do NOT qualify for exemption.

I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE ABOVE STATEMENTS ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF. REFUND WILL NOT BE PROCESSED WITHOUT SIGNATURE : Yes

Type Name : Sandy Frandy

Date : 11/12/2021 1:57 PM

If user uploaded documents or left comments when applying for the exemption, that would display in the corresponding tabs.