



SF CITY PARTNERS

City and County of San Francisco

A Step by Step Guide to Becoming an Approved Supplier

- Business Tax Registration
- 12B Equal Benefits Ordinance Declaration
- Optional 14B Local Business Enterprise Certification
- Troubleshooting Tech Issues (Pop-Ups, Log-In Issues, PeopleSoft Navigation, Clearing Your Cache)

Version 2.3



Topic	
Purpose of this Article	To provide step-by-step directions to help Registered Bidders become Approved Suppliers
Audience	Registered Bidders that want to become Approved Suppliers
Author	Kevane Wong
Version / Update Time	2.3 / 10.15.19
Search Terms	Approved, Supplier, "How to", 12B, Equal Benefits, 14B, LBE, Local Business Enterprise
Related Content	"Complete Your Business Tax Registration", "File a 12B Equal Benefits Ordinance Declaration", "File an Optional 14B Local Business Enterprise Certification"
Outline	See outline in the job aid

TABLE OF CONTENTS

Table of Contents3

Purpose and Description3

Topic 1: How to Become an Approved Supplier4

 San Francisco Business Tax Registration:.....6

 12B Equal Benefits Ordinance Declaration:.....9

 OPTIONAL - 14B Local Business Enterprise Certification:..... 17

Appendix: Troubleshooting Tech Issues25

 Managing Pop-Up Blockers..... 25

 Log-In Issues..... 25

 Basic PeopleSoft Navigation 25

 Clearing Your Cache in Web Browsers..... 25

PURPOSE AND DESCRIPTION

Purpose

This document provides steps and information to help business entities that have already become Registered Bidders and that want to become Approved Suppliers to the City & County of San Francisco. If your business already has a Supplier account, you should not be creating a new Supplier account in the system. If you are unsure if your business already has a Supplier account, then you should contact User Support at 415.944.2442 for assistance.

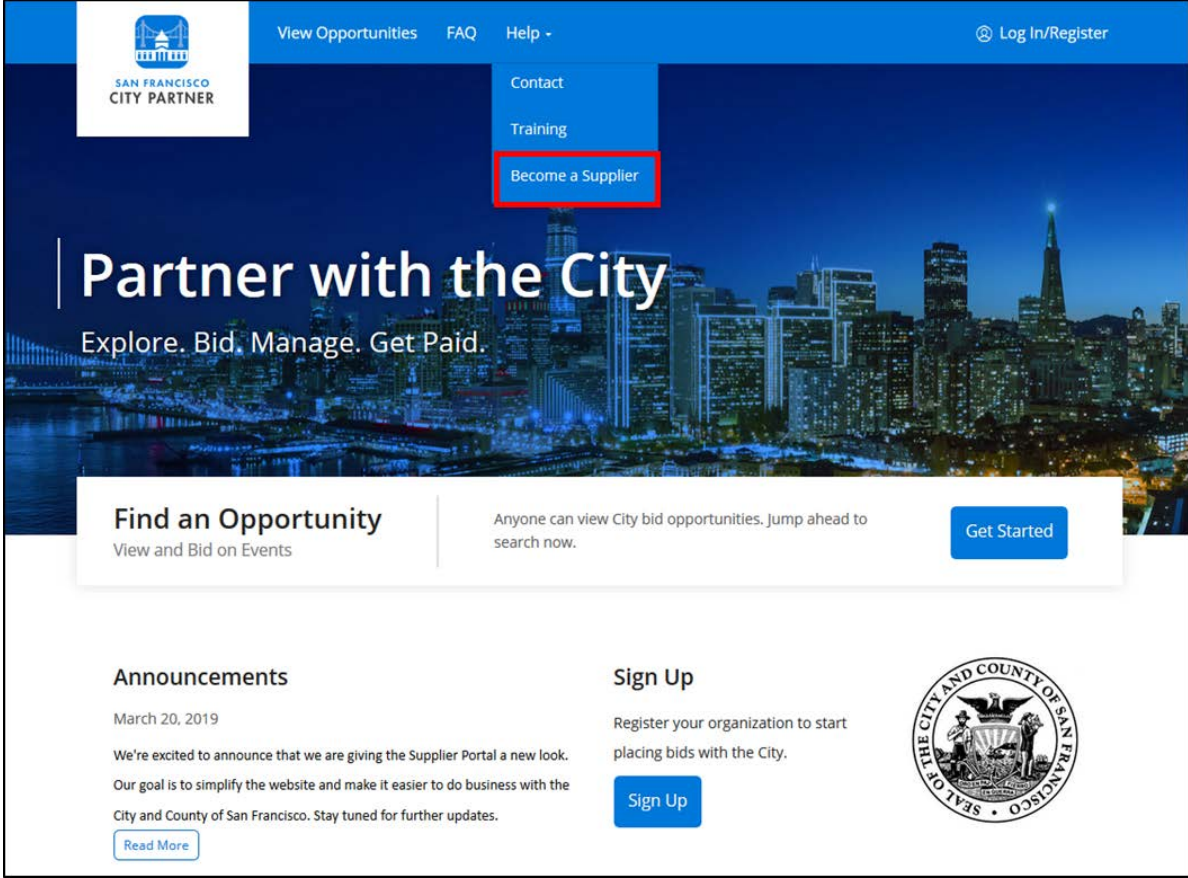
Key Background Information

Becoming a Supplier to the City & County of San Francisco is a two-tier process.

- **Registered Bidder:** The first step to begin working with the City is a short registration process in order to become a “Registered Bidder”. Being a “Registered Bidder” will allow your business to view and bid on contracts (however your business cannot be fully awarded a City contract until it goes through the steps required to become an Approved Supplier).
- **Approved Supplier:** Although “Registered Bidders” can view and bid on City business, in order to be fully awarded a City contract, a Registered Bidder will have to go through the Business Tax Registration and 12B Declaration processes required to become an “Approved Supplier”. The time to complete these can vary, and we strongly recommend that you start these processes as soon as possible to expedite your contract wins.



TOPIC 1: HOW TO BECOME AN APPROVED SUPPLIER

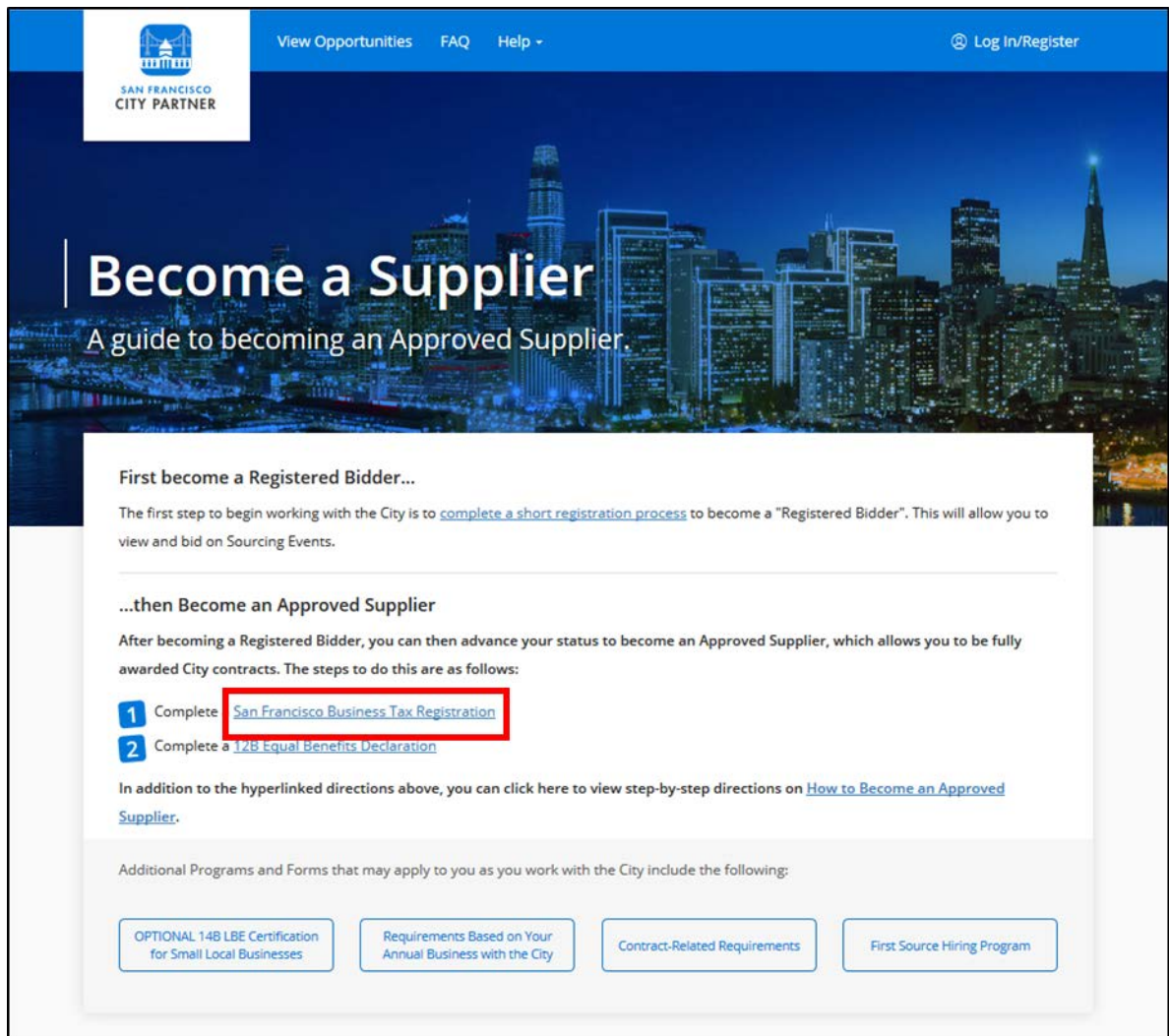
Step	Action
1.	<p>If you are already a Registered Bidder, then you can follow the steps to become an Approved Supplier. Go to the SF City Partner website at https://sfcitypartner.sfgov.org.</p> 



2.

Click on the “Help” pulldown menu and click on “Become a Supplier”. This will bring to the screen shown below. There are two main parts to becoming an Approved Supplier:

- Completing a San Francisco Business Tax Registration, and
- Completing a 12B Equal Benefits Declaration form.





San Francisco Business Tax Registration:

3. You should first attend to your Business Tax Registration Certificate with the Treasurer & Tax Collector's office. **Click on the San Francisco Business Tax Registration hyperlink**, which will bring you to the screen shown below (at <https://newbusiness.sfgov.org/vendor/>).

CCSF Supplier - Business Registration

Business Registration is required for all entities that conduct business in SF and determines your tax responsibilities. Upon establishment of your business, you will receive a Business Account Number (BAN) and a Business Certificate (to be posted in your location). In some cases, suppliers may not be required to register. To become a supplier, please visit: <http://sfcitypartner.sfgov.org>. You must have a Bidder/Supplier ID Number to complete this form.

Use this form to:

1. Determine if your business needs to register in San Francisco.
2. Register your business and/or link your existing business account to your Bidder/Supplier ID Number.
3. Declare that you do not need to register as a business in San Francisco.

Are you already registered?

Are you a registered business with a Business Account Number (or Business Registration Certificate)? If so, use the link provided to link your Bidder/Supplier ID Number to your Business Account Number [Click here to enter your BAN and Bidder/Supplier ID Number](#)

If you are not registered as a business:

Please answer "Yes" or "No" to the questions below to determine if you are required to register as a business with the Office of the Treasurer & Tax Collector.

Does this business:

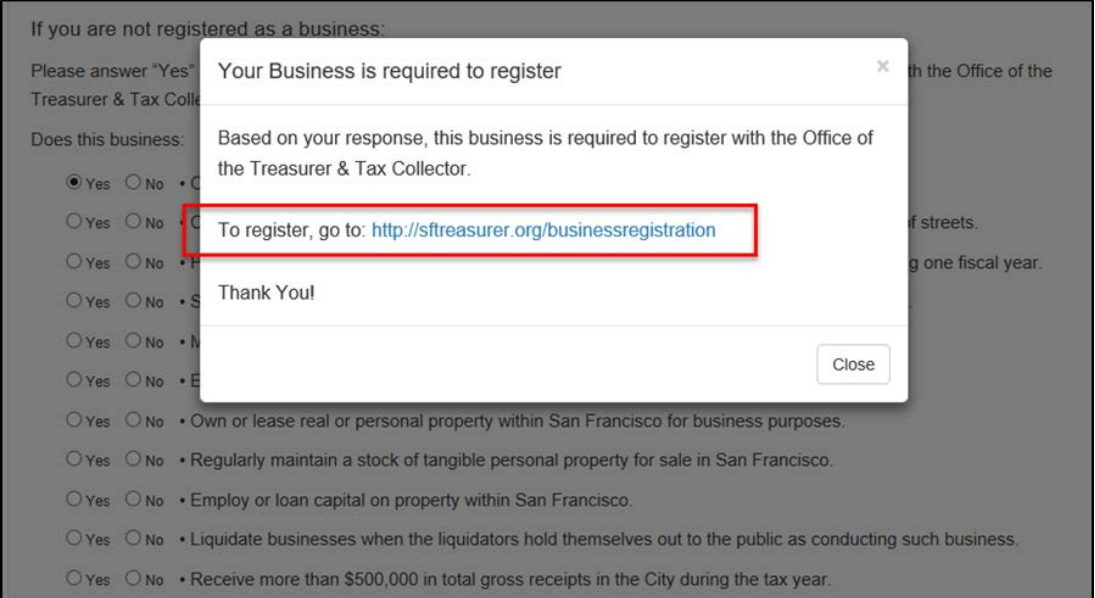
- ☐ Yes ☐ No • Operate as an independent contractor within San Francisco.
- ☐ Yes ☐ No • Conduct business in SF for any part of seven (7) days during the fiscal year, including use of streets.
- ☐ Yes ☐ No • Perform work or render services within San Francisco for all or part of any seven days during one fiscal year.
- ☐ Yes ☐ No • Solicit business within San Francisco for all or part of any seven days during one fiscal year.
- ☐ Yes ☐ No • Maintain a fixed place of business within San Francisco.
- ☐ Yes ☐ No • Exercise corporate or franchise powers within San Francisco.
- ☐ Yes ☐ No • Own or lease real or personal property within San Francisco for business purposes.
- ☐ Yes ☐ No • Regularly maintain a stock of tangible personal property for sale in San Francisco.
- ☐ Yes ☐ No • Employ or loan capital on property within San Francisco.
- ☐ Yes ☐ No • Liquidate businesses when the liquidators hold themselves out to the public as conducting such business.
- ☐ Yes ☐ No • Receive more than \$500,000 in total gross receipts in the City during the tax year.



4.	<p>If your organization has already completed its Business Tax Registration with the Treasurer & Tax Collector's office, then click on the "Click here to enter your BAN and Bidder/Supplier ID Number" hyperlink. You will then be taken to the screen shown below. Follow the steps on this screen to link your existing business registration with your Supplier Application.</p> <div data-bbox="349 363 1378 882"> <p style="text-align: center;">Are you already registered?</p> <p>Please use the space below to enter your Business Account Number. Once you confirm your Business Name, you will be prompted to enter your Supplier/Bidder ID Number.</p> <div style="border: 1px solid red; padding: 10px;"> <p>Enter Business Account Number:</p> <input type="text"/> <input type="button" value="Validate"/> <p>Business Name:</p> <input type="text"/> <input type="button" value="Continue"/> <input type="button" value="Reset"/> </div> </div>
----	---

5.	<p>If your business has not registered with the City before or if it needs to renew an existing registration, then answer the list of questions on the screen.</p> <div data-bbox="235 1071 1469 1944"> <p>5A. If your answer is "No" to all of these questions, the "Continue" button will appear. Click the "Continue" button and an "In-Lieu of Business Registration" form will appear that you will need to complete and submit.</p> <div data-bbox="349 1211 1461 1932"> <p>If you are not registered as a business:</p> <p>Please answer "Yes" or "No" to the questions below to determine if you are required to register as a business with the Office of the Treasurer & Tax Collector.</p> <p>Does this business:</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input checked="" type="radio"/> No • Operate as an independent contractor within San Francisco. <input type="radio"/> Yes <input checked="" type="radio"/> No • Conduct business in SF for any part of seven (7) days during the fiscal year, including use of streets. <input type="radio"/> Yes <input checked="" type="radio"/> No • Perform work or render services within San Francisco for all or part of any seven days during one fiscal year. <input type="radio"/> Yes <input checked="" type="radio"/> No • Solicit business within San Francisco for all or part of any seven days during one fiscal year. <input type="radio"/> Yes <input checked="" type="radio"/> No • Maintain a fixed place of business within San Francisco. <input type="radio"/> Yes <input checked="" type="radio"/> No • Exercise corporate or franchise powers within San Francisco. <input type="radio"/> Yes <input checked="" type="radio"/> No • Own or lease real or personal property within San Francisco for business purposes. <input type="radio"/> Yes <input checked="" type="radio"/> No • Regularly maintain a stock of tangible personal property for sale in San Francisco. <input type="radio"/> Yes <input checked="" type="radio"/> No • Employ or loan capital on property within San Francisco. <input type="radio"/> Yes <input checked="" type="radio"/> No • Liquidate businesses when the liquidators hold themselves out to the public as conducting such business. <input type="radio"/> Yes <input checked="" type="radio"/> No • Receive more than \$500,000 in total gross receipts in the City during the tax year. <div style="border: 1px solid red; padding: 10px; text-align: center;"> <input type="button" value="Continue"/> </div> </div> </div>
----	--



<p>5B.</p>	<p>If you responded “Yes” to any question in the list, you will be required to register with the Office of the Treasurer & Tax Collector for a San Francisco Business Tax Registration certificate. In this case, <i>click</i> on the http://sftreasurer.org/businessregistration link shown below and follow the directions on the screen.</p> 
-------------------	---

<p>6.</p>	<p>Once your Business Tax Registration has been processed and entered into the PeopleSoft system, your Bidder ID will be converted to a Supplier ID and you will receive a notification with your new Supplier ID Number. At this point you will be listed as a Supplier in the PeopleSoft system. Your log-on should remain unchanged but should now direct you to your business’ Supplier account (and not your old Bidder account). However, you will still need to be verified as complying with the 12B Administrative Code to be fully awarded any contracts.</p>
------------------	--



12B Equal Benefits Ordinance Declaration:

7. Next, you will need to submit your 12B Declaration. Chapter 12B of the San Francisco Administrative Code (the Equal Benefits Ordinance) requires firms that provide goods or services to the City and County of San Francisco to administer benefits equally to employees with domestic partners and employees with spouses. This declaration is part of the process of verifying that your business complies with this Administrative Code.

View Opportunities FAQ Help - Log In/Register

Become a Supplier

A guide to becoming an Approved Supplier.

First become a Registered Bidder...

The first step to begin working with the City is to [complete a short registration process](#) to become a "Registered Bidder". This will allow you to view and bid on Sourcing Events.

...then Become an Approved Supplier

After becoming a Registered Bidder, you can then advance your status to become an Approved Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

- 1 Complete a [San Francisco Business Tax Registration](#)
- 2 Complete a [12B Equal Benefits Declaration](#)

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on [How to Become an Approved Supplier](#).

Additional Programs and Forms that may apply to you as you work with the City include the following:

- [OPTIONAL 14B LBE Certification for Small Local Businesses](#)
- [Requirements Based on Your Annual Business with the City](#)
- [Contract-Related Requirements](#)
- [First Source Hiring Program](#)



8. From the Become a Supplier page on the SF City Partner website, **click on the 12B Equal Benefits Declaration hyperlink**. Then, in the pop-up box shown below, click on the **Please click here to log-in and submit a 12B Declaration** hyperlink.

12B Equal Benefits Declaration

Chapter 12B of the Administrative Code requires that all Suppliers to the City and County of San Francisco administer benefits equally to employees with domestic partners and employees with spouses. [Please click here to log-in and submit a 12B Declaration](#). After your 12B Declaration has been received and processed, you will receive an email from the City's Contract Monitoring Division.

If you need help with your 12B Declaration, you can [click here for step-by-step directions on how to File a 12B Equal Benefits Ordinance Declaration](#). In addition, further information on the 12B Equal Benefits program, including a directory of 12B compliant firms, can be found on the [Contract Monitoring Division website](#).

Close

9. You'll then be taken to the log-in page shown below. **Click Log in to start the log-in process**. Please look to the "How to Log In to the SF City Partner Website" job aid for details on this process.

[View Opportunities](#)
[FAQ](#)
[Help -](#)

[Log In/Register](#)

Hello!

Already registered? Log in to manage your existing business or bid on new business opportunities with the City and County of San Francisco.

Need an account? Click the Start or Continue Registration button.

[Having trouble signing in?](#)

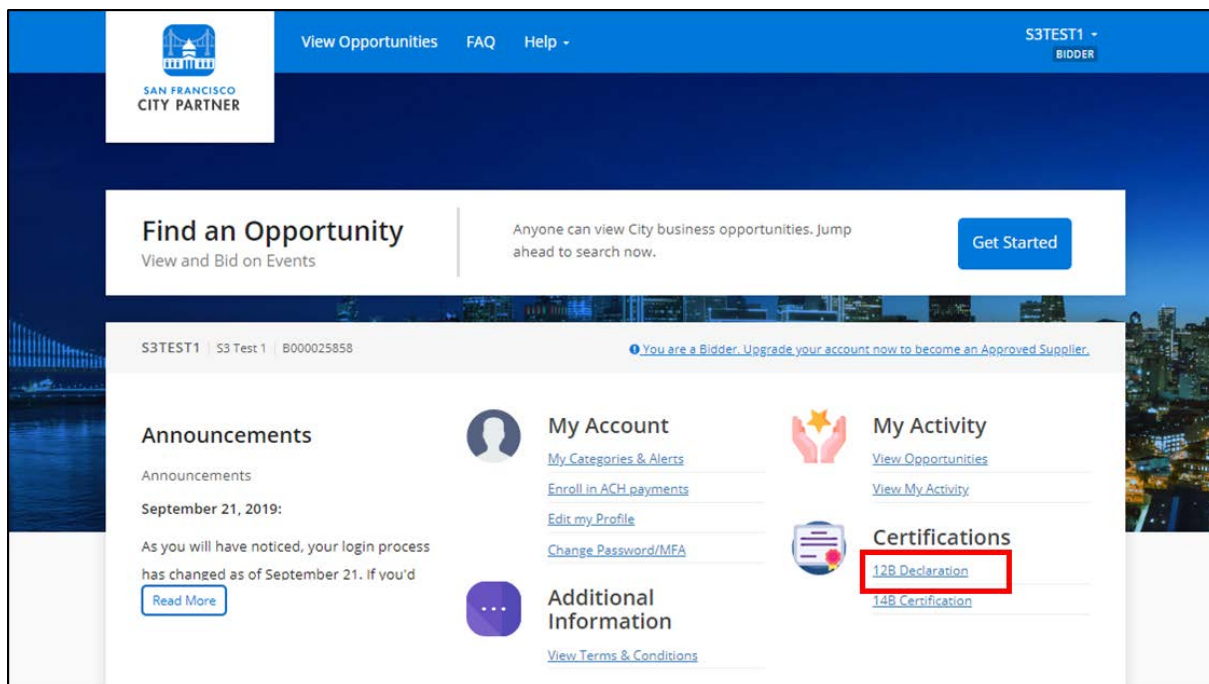
Get Started

Log in

Start or Continue Registration



10. After you have logged into the system, you'll land on the main Workcenter page. **Click on the 12B Declaration hyperlink.**



11. **Click on the Add a New Value tab and choose "Bidder" in the Declaration Type Field** (the SetID field should already say "SHARE" and the Declaration Number field should already say "NEXT"). **Then click "Add"** and you will be brought to the 12B Compliance Declaration page, which is shown in the following four screens.

12B Declaration

Find an Existing Value **Add a New Value**

SetID **SHARE**

Declaration Number **NEXT**

Declaration Type **Bidder**

Supplier ID

Bidder ID

Add



12.

In the top part of the 12B Declaration (shown below), **be sure to review the “S.F. Administrative Code Chapters 12B & 12C: Nondiscrimination in Contracts and Benefits” section as well as the “Audits & Required Documentation” text.**

12B Compliance Declaration

Declaration Number	NEXT
Declaration Type	Bidder
Bidder ID	"Bidder Number"
Declarant Name	"Bidder Name"

S.F. ADMINISTRATIVE CODE CHAPTERS 12B & 12C: NONDISCRIMINATION IN CONTRACTS AND BENEFITS

The Equal Benefits Ordinance prohibits the City and County of San Francisco from contracting with vendors that discriminate in the provision of benefits between employees with domestic partners and employees with spouses, and between the domestic partners and spouses of such employees.

- Domestic Partners are same-sex and opposite-sex couples registered with any state or local government domestic partner registry authorized to perform such registrations
- Domestic partnerships and marriages may only be verified to the same extent and in the same manner. For example, waiting periods to qualify for benefits must be the same for domestic partners and spouses. Domestic partner registry certificates must be recognized as fully equivalent to marriage certificates

AUDITS & REQUIRED DOCUMENTATION

The City and County of San Francisco regularly audits firms to verify that declaration responses and supporting documentation provided are complete and accurate. For a detailed description of compliant documentation, [click here](#) for the Chapter 12B Equal Benefits Documentation Guide.

To be certified under Chapters 12B & 12C you must submit proper documentation confirming that your firm has already fully implemented equal benefits for employees with spouses and employees with domestic partners, and between the spouses and domestic partners of such employees.

The following documentation must be submitted to complete this declaration:

- Most recent legal verification of employee count/firm structure, for example, a W-3 Form, DE 1 Form, DE 9 Form or an annual San Francisco Payroll Expense Tax Statement. (Please redact confidential employee information.)
- A copy of a memorandum that has been distributed to your firm's employees detailing the firm's compliant nondiscrimination and domestic partner benefit policies. [Click here](#) to download a sample 12B Compliant Memorandum to Employees.

Note: The memorandum is not a substitute for fully compliant incorporation of domestic partner language in your firm's benefit policies. You may also be required to provide benefit documentation to verify that your firm does not discriminate in the provision of benefits. Such documentation may include your employee handbook, confirmations from your insurance, union and/or retirement documents. Failure to offer benefits in accordance with the San Francisco Chapter 12B Equal Benefits Ordinance may result in suspension of your firm's compliance status, financial penalties and/or the inability to contract with the City and County of San Francisco.



13.

In the "Company Information" and "Compliance Question" sections (shown above), fill in the following:

- **No. of Employees in the U.S.** Enter the number of employees your business has. Enter zero if you are an individual providing services to the City (with no additional employees).
- **Add Attachment:** You will need to upload legal verification of your employee count and firm structure. This legal verification can include a W-3 Form, DE-1 Form, DE-9 Form, or an annual San Francisco Payroll Tax Statement.
- **Are any of your employees covered by a collective bargaining agreement or union trust fund:** Select Yes or No for this question. If yes, specify the Union Name in the box provided.
- **Select a default address location and contact:**
 - In the Address section, put a checkmark in front of one of your addresses to designate it as the default location.
 - In the Contact section, put a checkmark in front of one of your contacts to designate that person as the default contact.
- **Compliance Question:** Answer the compliance questions.

COMPANY INFORMATION

Taxpayer Identification Number

#####

No. of Employees in the U.S.

Please attach legal verification of employee count/firm structure

Add Attachment

Are any of your employees covered by a collective bargaining agreement or union trust fund?

Yes ☐ No ☐

Union Name

N/A

	Description	Address 1	Address 2	City	State	Country	ZIP
<input type="checkbox"/>	MAIN1	"Main Address"		"City"	CA	USA	####
<input type="checkbox"/>	MAIN2	"Second Address"		"City"	CA	USA	####

	Description	Name	Phone	Email
<input type="checkbox"/>	MAIN1	"Contact Name #1"	"Contact Phone #1"	PeopleSoftTesting@sfgov.org
<input type="checkbox"/>	MAIN2	"Contact Name #2"	"Contact Phone #2"	PeopleSoftTesting@sfgov.org
<input type="checkbox"/>	MAIN3	"Contact Name #3"	"Contact Phone #3"	PeopleSoftTesting@sfgov.org

COMPLIANCE QUESTION

Nondiscrimination - Protected Classes

1.A Does your firm agree it will not discriminate against its employees, applicants for employment, employees of the City, or members of the public on the basis of the fact or perception of a person's membership in the following categories?

Race, color, creed, religion, national origin, ancestry, age, sex, sexual orientation, gender identity (transgender status), domestic partner status, marital status, disability, AIDS / HIV status, weight.

Please note: a YES answer is required for compliance.

Yes ☐ No ☐

1.B Does your firm agree to insert a similar nondiscrimination provision in any subcontract you enter into for the performance of a substantial portion of the contract you have with the City?

Please note: You must answer this question even if you do not intend to enter into any subcontracts, and a Yes answer is required for compliance.

Yes ☐ No ☐



14.

In the “Benefits Question” section (shown above), answer the questions and click on the appropriate **Type of Benefit options**. Check all the benefits that apply. Use the “Other” lines to add in any additional benefits that are not specified.

BENEFITS QUESTION

Nondiscrimination - Equal Benefits
 for (i) Employees with Spouses and (ii) Employees with Domestic Partners and (iii) Employee's Spouse or Domestic Partner.

2.A Does your firm provide or offer access to any employee benefits?
(If your firm does not have any employees, answer NO)

2.B If you answered YES to 2.A, are all of the benefits equally available to employees with domestic partners and employees with spouses?
(If your firm does not have any employees, answer NO)

Questions 2A and 2B should be answered YES even if your employees pay some or all of the cost of spousal or domestic partner benefits

2.C Check all benefits that apply to your answers above and list in the “Other” line any additional benefits not already specified. Note: some benefits are provided to employees because they have a spouse or domestic partner, such as bereavement leave; other benefits are provided directly to the spouse or domestic partner, such as dependent life insurance.

Type of Benefit	Available To		
	Employee	Domestic Partner	Spouse
Health Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dental Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vision Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pension	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bereavement Leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family Medical Leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parental Leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Assistance Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relocation and/or Travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discounts/Facilities/Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Union	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-Term/Long-Term Disability Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accidental Death & Dismemberment Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <input style="width: 100px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <input style="width: 100px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Union	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



15.

Answer the questions in the “Company Benefit Policy” section (shown above). The “Other Supporting or Required Documentation” can be used to upload additional supporting documents for your 12B Declaration. The “Comments” section can be used to add additional information. Note the agreement language. If you need to save your progress and return later, you can click on the “Save” button. **Click “Submit” when your 12B Declaration is completed.**

COMPANY BENEFIT POLICY

2.D Indicate whether each statement applies to your firm.

Domestic partners are defined as same-sex couples and opposite-sex couples registered with any state or local registry and verify their relationship in the same manner as spouses.

Yes ☐ No ☐

A memorandum detailing our firm's domestic partner policies has been distributed to employees.

Yes ☐ No ☐

The employee handbook includes domestic partner language wherever spouses are referenced.

Yes ☐ No ☐

The children of domestic partners are explicitly included in all policies that recognize stepchildren.

Yes ☐ No ☐

All insurance plans contain language that recognizes spouses and domestic partners equally.

Yes ☐ No ☐

All retirement, 401(k) and similar plans explicitly provide the same distribution choices for spousal and domestic partner or nonspousal beneficiaries.

Yes ☐ No ☐

OTHER SUPPORTING OR REQUIRED DOCUMENTATION

Filename	Description	Username	Date/Time Stamp	Add Attachment	View Attachment
1				Add Attachment	View Attachment

COMMENTS

By clicking the Submit button I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Save

Submit

Cancel

Print

Created By: "User Name"

Created On: 06/27/2017 11:25AM

Last Updated By: "User Name"

Last Updated On: 06/27/17 11:25AM



- 16.** After you have submitted your 12B Declaration, the system will generate a Declaration Number (as shown above). Now, if you navigate to the 12B Application page and click on the “Find an Existing Value” tab, you can search for this Declaration Number. **You will now need to wait for the City’s Contract Monitoring Division to process and approve your 12B Declaration. They will send you an email when they have completed their 12B processes.**

12B Compliance Declaration

Declaration Number "#####"

Declaration Type Bidder

Bidder ID "Bidder Number"

Declarant Name "Bidder Name"

S.F. ADMINISTRATIVE CODE CHAPTERS 12B & 12C: NONDISCRIMINATION IN CONTRACTS AND BENEFITS

The Equal Benefits Ordinance prohibits the City and County of San Francisco from contracting with vendors that discriminate in the provision of benefits between employees with domestic partners and employees with spouses, and between the domestic partners and spouses of such employees.

- Domestic Partners are same-sex and opposite-sex couples registered with any state or local government domestic partner registry authorized to perform such registrations.

- 17.** More information on the 12B Equal Benefits program, can be found on the Contract Monitoring Division website at <http://sfgov.org/cmd/12b-equal-benefits-program>).

- 18.** If you have any questions about the 12B process, you should reach out directly to the Contract Monitoring Division (CMD) at 415.581.2310. The CMD Contact page at <https://sfgov.org/cmd/contact> (shown below) will also show a list of CMD personnel and their individual contact info.

CITY AND COUNTY OF
SAN FRANCISCO

Contract Monitoring Division

Home > Contact

Contact

General Services Agency - Contract Monitoring Division
 30 Van Ness Avenue, Suite 200
 San Francisco, CA 94102
 Phone: (415) 581-2310 Fax: (415) 581-2351
www.sfgov.org/CMD

SHARE THIS

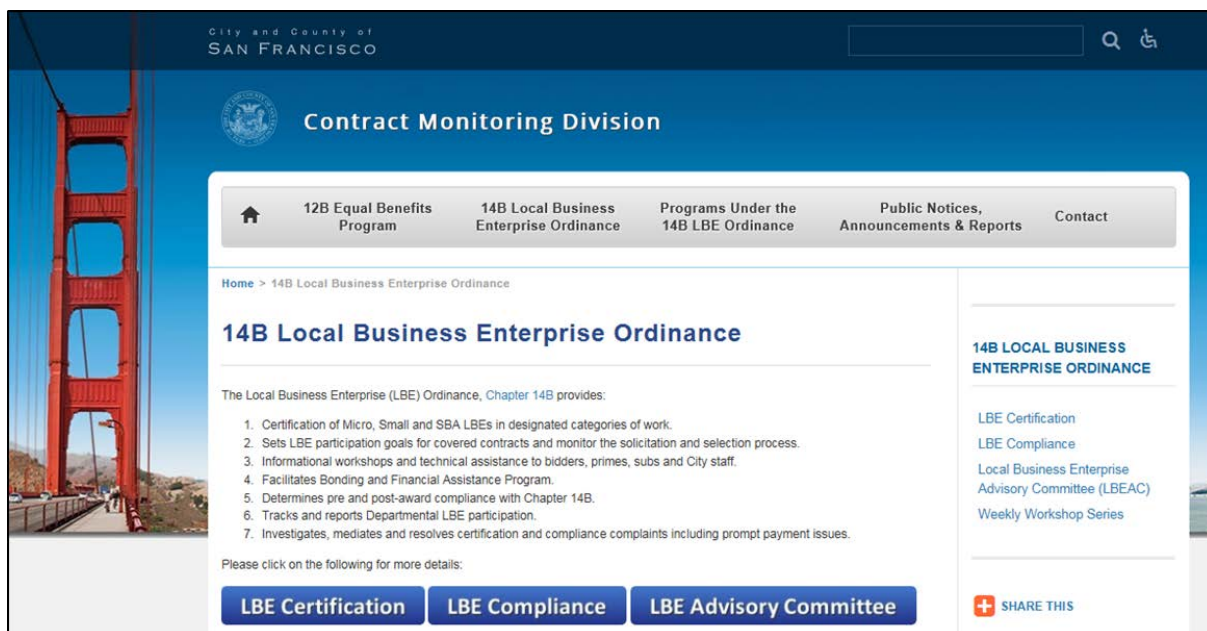
Select Language



OPTIONAL - 14B Local Business Enterprise Certification:

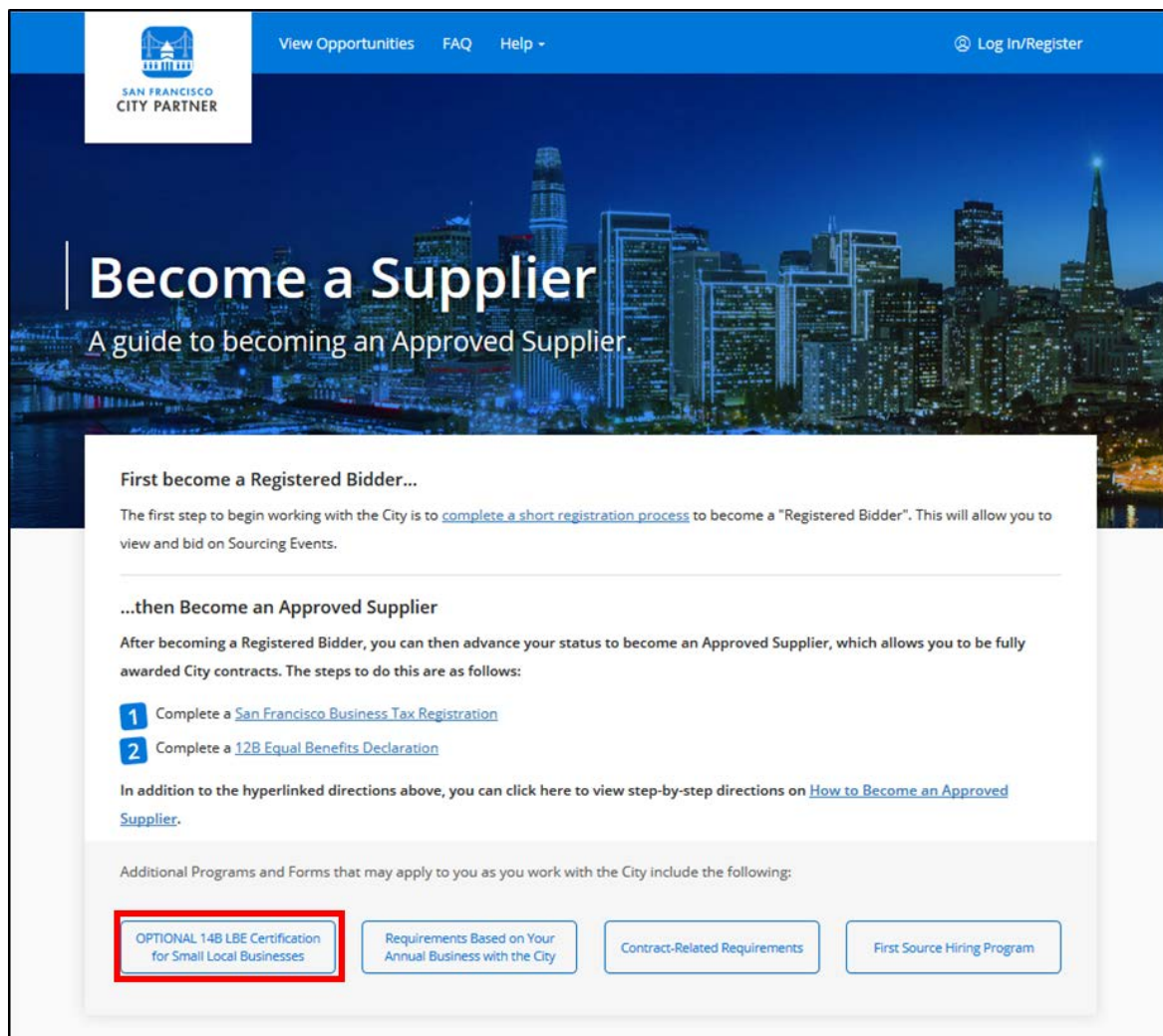
- 19.** OPTIONAL - The 14B Local Business Enterprise (LBE) Certification is available to small businesses with a headquarters in San Francisco or the PUC Regional Service area. For information about the LBE criteria for eligibility, go to <https://sfgov.org/cmd/LBE-certification-0>.

Please note that businesses that do not qualify for 14B status should NOT fill in a 14B certification form. For full information about the 14B Local Business Enterprise (LBE) ordinance, go to the Contract Monitoring Division website at <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>.





20.



From the Become a Supplier page on the SF City Partner website, **click on the OPTIONAL 14B LBE Certification for Small Local Businesses hyperlink**. Then, in the pop-up box shown below, click on the **Please click here to log-in and submit a 14B Certification** hyperlink.



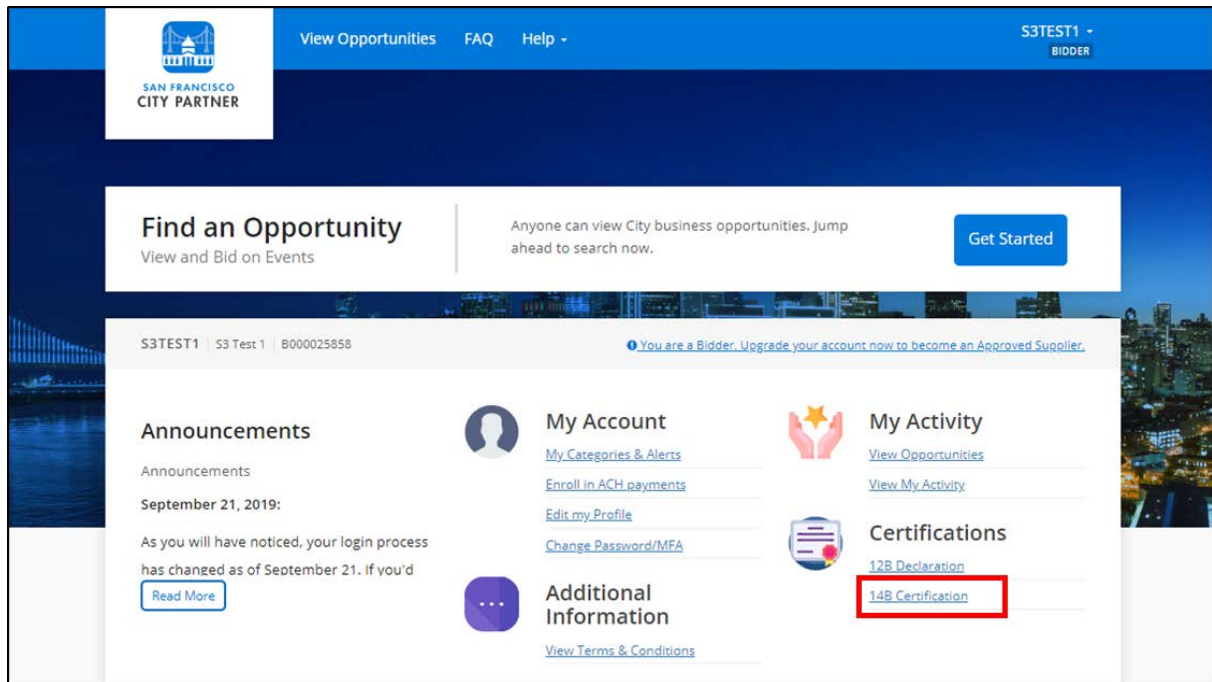
21.

If you have not logged in already, you will need to log-in. Please look to the “How to Log Into the SF City Partner Website” job aid for details on this process.



22.

After you have logged into the system, you'll land on the main Workcenter page. **Click on the 14B Certification hyperlink.**



23.

On the 14B Certification Application page, **click on the Add a New Value tab and choose “Bidder” in the Applicant Type Field** (the SetID field should already say “SHARE”, the Application Number field should already say “NEXT”, and the Bidder ID field should already show your Bidder Account number). **Then click “Add”** and you will be brought to the 12B Compliance Declaration page, which is shown in the following four screens.

14B Certification Application

[Find an Existing Value](#) **Add a New Value**

SetID

Application Number

Applicant Type

Supplier ID

Bidder ID

Add

[Find an Existing Value](#) | [Add a New Value](#)



24.

In the top part of the 14B Certification Application, mark down the Application Type, answer the questions on the page, upload related attachments when indicated.

14B Certification Application

Applicant Name "Company Name" Applicant ID "Bidder ID#"
Application Number NEXT Applicant Type Bidder
Application Status Draft

*Indicates required field

*Application Type ☒ Initial Certification

*Please select the statement that accurately represents your organization.

- ☐ My company has a primary place of business located in San Francisco.
- ☐ My organization is a Nonprofit Enterprise and has a primary place of business located in San Francisco.
- ☐ My company has a primary place of business outside of San Francisco, but within the "SFPUC Water System Service Area" and is seeking to participate in PUC Hetch Hetchy projects.

Please indicate whether your business is a San Francisco Green Business. ☐ Yes ☐ No

Provide a copy of your Green Business Program Recognition Certificate. [Add Attachment](#)

*Tax Identification Number "#####"

*Business Type

*Provide verification of your business type as applicable. Partnerships, provide your partnership agreement. Corporations, provide your Articles of Incorporation. LLCs, provide your Articles of Organization. Non-profits, provide your IRS determination letter confirming 501(c)(3) exemptions status and your most recently filed California Attorney General Registration Renewal Fee Form (RRF-1). [Add Attachment](#)

Incorporation/ Commencement Date

State Incorporated



25.

In the “Location and Contact Information” part of the 14B Certification Application (shown above), use the checkboxes to indicate the default Primary Place of Business, Vehicle Parking Address, Mailing Address, and Certification Contact. Also answer the two questions on the page and upload any required attachments.

Location and Contact Information

***Primary Place of Business**
 Provide verification of your primary place of business.

Address List

Description	Address 1	Address 2	City	State	Zip Code
<input checked="" type="radio"/> Main	"Main Address"		"City"	CA	#####
<input type="radio"/> Other	"Second Address"		"City"	CA	#####

***Check all that apply** ☐ Home Office ☐ Own ☐ Lease

*Provide verification of your primary place of business. If you lease the property, provide your lease or other written agreement and proof of a recent rent payment. If you own the property, provide proof of ownership (e.g. property tax bill, deed of trust).

*Provide verification of your additional business locations. If you lease the property, provide your lease or other written agreement and proof of a recent rent payment. If you own the property, provide proof of ownership (e.g. property tax bill, deed of trust).

***Trucker/Hauler** ☐ Yes ☐ No

Vehicle Parking Addresses
 Identify any business locations used to park business vehicles. If your vehicles are parked on the street, do not select any business locations.

Address List

Description	Address 1	Address 2	City	State	Zip Code
<input type="checkbox"/> Main	"Main Address"		"City"	CA	#####
<input type="checkbox"/> Other	"Second Address"		"City"	CA	#####

Provide verification of your business locations used for vehicle parking. If you lease the property, provide your lease or other written agreement and proof of a recent rent payment. If you own the property, provide proof of ownership (e.g. property tax bill, deed of trust).

***Mailing Address**

Address List

Description	Address 1	Address 2	City	State	Zip Code
<input type="radio"/> Main	"Main Address"		"City"	CA	#####
<input type="radio"/> Other	"Second Address"		"City"	CA	#####

***Certification Contact**

Contact List

Description	Name	Business Phone	Email
<input type="radio"/>	"Contact Name #1"	"Contact Phone #1"	PeopleSoftTesting@sfgov.org
<input type="radio"/>	"Contact Name #2"	"Contact Phone #2"	PeopleSoftTesting@sfgov.org
<input type="radio"/>	"Contact Name #3"	"Contact Phone #3"	PeopleSoftTesting@sfgov.org



26.

Answer the questions and upload any required documentation in the “Organization Information” section (shown above).

Organization Information

*Provide verification of six months of continuous operation. Provide your current San Francisco Business License. Truckers and Haulers, provide your DMV Motor Carrier Permit and proof of ownership (e.g. registration and title) for each vehicle in your fleet.

Add Attachment

Complete the table below for anyone who is an officer of the corporation (e.g. president, vice president, secretary, treasurer).

*Owner/Shareholder	*Title	*Years with Company	*Ownership %	Professional and/or Contractor Licenses	City Employee	Ethnicity	Female?	LGBT	Disabled Veteran
					<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide proof of ownership percentages (e.g. most recent K-1 Schedules) for the owners and principals as identified.

Add Attachment

Has any owner, partner, or officer of your firm operated a firm under any other name in the last five years?

Please provide clarification.

For any person listed in the table above that has been associated with a firm as an owner, general partner, limited partner, or officer at any time during the last five years, identify the person, firm and date range of association. In this context of this question, “owner” and “partner” refer to ownership of 10% or more of the business or 10% or more of its’ stock if the business is incorporated.

Name	Construction Firm	Begin Association	End Association

Has there been any change in ownership of the firm at any time during the past five years?

Please provide clarification.

Are any of the owner/shareholders identified full time employees for another business?

Please provide clarification.

*Provide the three most recently filed federal income tax returns for your business. Submit only the first page of Form 1120, 1120S or 1065, OR 1040 Schedule C, depreciation schedules, and K-1 schedules, if any.

*Provide the three most recently filed personal income tax returns for each owner identified. Submit only the first two pages (i.e. Form 1040, signature page), depreciation schedules, and Schedules C, E and F, if any.

OPTIONAL-Provide proof of gender or nationality (e.g. passport, driver's license, birth certificate) for each owner / principal identified as a Female or Ethnic Minority.

OPTIONAL-Provide proof of LGBT certification with the National Gay and Lesbian Chamber of Commerce for each owner/principal identified as LGBT.

OPTIONAL-Provide proof of DVBE certification with the State of California Department of General Services for each owner/principal identified as a Disabled Veteran.

Add Attachment

Add Attachment

Add Attachment

Add Attachment

Add Attachment



- 27. Answer the questions and upload any required documentation in the “Board of Directors” and “Employee Information” sections (shown above).**
- In the “Certification Categories” section, open up the applicable folders on the left-hand side of the page to find and click on the categories that relate to the goods and services your business provides.** As you click these categories, you should see them become listed on the right-hand side of the page. Upload related documentation.
- Use the “Other Comments and Attachments” section to upload any additional files and give additional commentary.**

Board of Directors

Personalize | Find |

First 1 of 1 Last

*Name	*Term	*Place of Residence	Professional and/or Contractor Licenses	City Employee
1				<input type="checkbox"/>

*Provide the three most recently filed federal Form 990, 990-N, or 990EZ for your non-profit organization.

*Add Attachment

*Provide the three most recently filed Form 199, California Exempt Organization Annual Information Return, or Form 109, California Exempt Organization Business Income Tax Return, for your non-profit organization.

*Add Attachment

Employee Information

How many employees does your company have?

*Indicate whether your business paid wages last year.

Certification Categories

*Identify the goods and services that you provide. Click the category to select or to deselect.

Left | Right

ALL - All Categories

GC - Class A and B General Contract

SC - Specialty Construction Contrac

TH - Trucking and Hauling

GME - Goods, Materials, and Equipmen

GSP - General Service Providers

AE - Architects and Engineers

PS - Professional Services

My Requested Certification Categories

Category	Description
----------	-------------

Provide invoices with contracts signed by your clients to verify your ability to provide the goods and services for which you are seeking certification. Provide three examples for each category identified for certification.

Add Attachment

Other Comments and Attachments

Attachments

Find |

First 1 of 1 Last

Attached File	File Description	View
1		View

Add Attachment

Comments

Affadavit

By clicking submit, I declare and swear under penalty of law that the statements made in this application are true, correct, and complete. I further agree to permit audits and examination of the books, records and files of the named firm to verify the information submitted in this application. Any material misrepresentation will be grounds for initiating criminal and civil actions under federal, state, and local laws and for terminating any contract awarded pursuant to this Certification.

Expand All Collapse All

Created By "Contact Person"

Last Modified By

Created Date/time 07/10/2018 10:16AM

Last Modified Date/time

Save

Submit

Cancel

If you need to save your progress and return later, you can click on the “Save” button. **Click “Submit” when your 14B Certification form is completed.**

Version 2.3

Page 23 of 30



<p>28.</p>	<div data-bbox="634 205 1097 512" data-label="Image"> </div> <p>After you have submitted your 14B Certification, the system will show a pop-up box indicating that your application has been submitted. The system will now generate an Application ID Number (as shown below) for your 14B Certification Application. Now, if you navigate to the 14B Certification page and click on the “Find an Existing Value” tab, you can search for this Application ID Number. You will now need to wait for the City to process and approve your 14B Certification. They will send you an email when they have completed their 14B processes.</p> <div data-bbox="370 758 1360 940" data-label="Form"> <table border="1"> <thead> <tr> <th colspan="2">14B Certification Application</th> </tr> </thead> <tbody> <tr> <td>Applicant Name</td> <td>"Company Name"</td> </tr> <tr> <td>Application Number</td> <td>"#####"</td> </tr> <tr> <td>Application Status</td> <td>Submitted</td> </tr> <tr> <td>Applicant ID</td> <td>"#####"</td> </tr> <tr> <td>Applicant Type</td> <td>Bidder</td> </tr> </tbody> </table> </div>	14B Certification Application		Applicant Name	"Company Name"	Application Number	"#####"	Application Status	Submitted	Applicant ID	"#####"	Applicant Type	Bidder
14B Certification Application													
Applicant Name	"Company Name"												
Application Number	"#####"												
Application Status	Submitted												
Applicant ID	"#####"												
Applicant Type	Bidder												
<p>29.</p>	<p>Questions?</p> <p>If you have any questions related to the PeopleSoft system, contact User Support at 415.944.2442 or via email at sfcitypartnersupport@sfgov.org.</p> <p>If you have any questions about the 14B criteria for certification, please contact the Contract Monitoring Division (CMD) at 415.581.2310, via email at lbectert@sfgov.org, or in person at 30 Van Ness, Suite 200; San Francisco.</p>												



APPENDIX: TROUBLESHOOTING TECH ISSUES

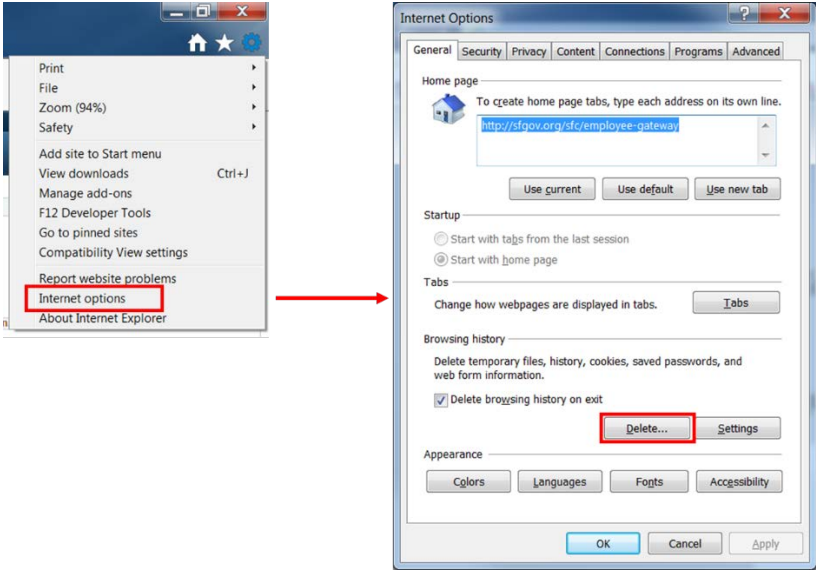
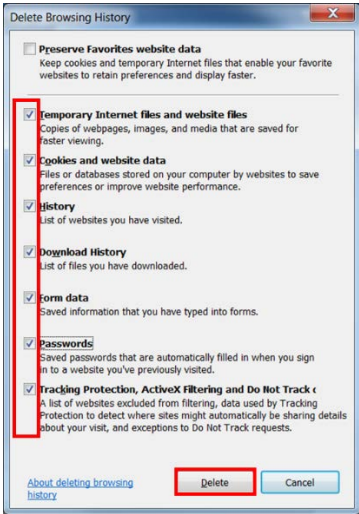
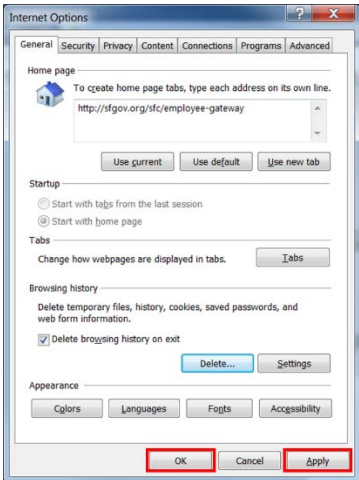
Managing Pop-Up Blockers	
1.	The SF City Partner Portal and the PeopleSoft system use pop-up windows, which will be an issue if your system is not set up to allow these popups. Please change the settings in your browser to allow popups or add this website (epufspi-bifrost.sfgov.org) to your browser's list of "trusted sites".

Log-In Issues	
2.	<p>The Department of Technology manages log-on assignments and passwords. If you are having connection or log-on issues with the PeopleSoft system, contact the Department of Technology Help Desk at 628.652.5000 or at DTIS.helpDesk@sfgov.org (their home page is at http://sfgov.org/DT). Examples of connection issues include a "network error" message in your internet browser. An example of a log in issue is if you do not have a valid password or user name.</p> <p>If you have never had a User Profile set up in the system (i.e. you've never had log-on access to the system), then you should first contact the Administrator(s) at your business who has been granted the rights to be able to set up User Profiles in our PeopleSoft system. If you do not know who this would be or if no one has been set up as an administrator, then contact the systems User Support desk at 415.944.2442 or at sfcitypartnersupport@sfgov.org for help.</p>

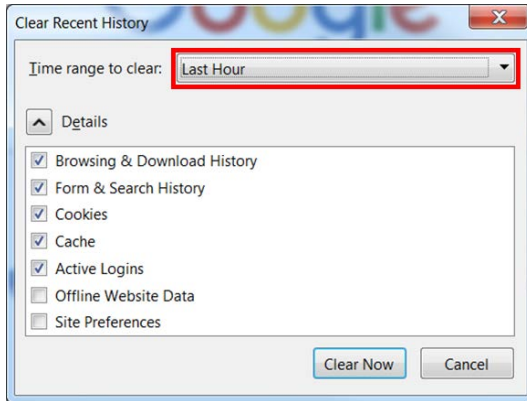
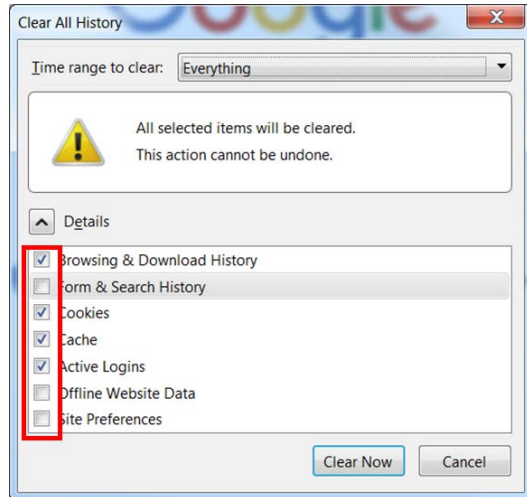
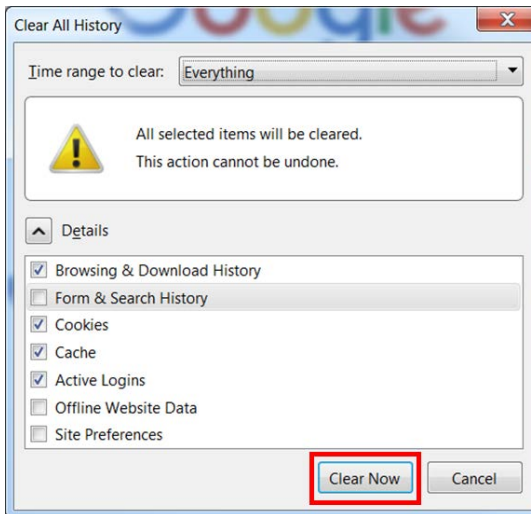
Basic PeopleSoft Navigation	
3.	<p>Timing Out in the System</p> <p>Once you have logged into the system, each browser tab that is open will have a timer that will log you out of the system after 20 minutes of inactivity. So, for example, if you logged in using Internet Explorer and have 3 different tabs (windows) open, each one will have a timer running and each can log you out after 20 minutes of no activity on that individual tab.</p> <p>Although a pop-up will give you a warning, this will often not be seen, causing this log-out issue. In order to avoid this issue, we recommend closing browser tabs that you are no longer using so that these unused tabs do not log you out.</p>

Clearing Your Cache in Web Browsers	
4.	Our system supports all major browsers, including Internet Explorer, Chrome, and Firefox. If you have having issues with one browser, you may want to see if another browser will work better. Sometimes the issue is related to old data in your browsing history that is interfering with the system. In order to fix this, you may need to clear your cache. To clear your cache, follow these instructions:

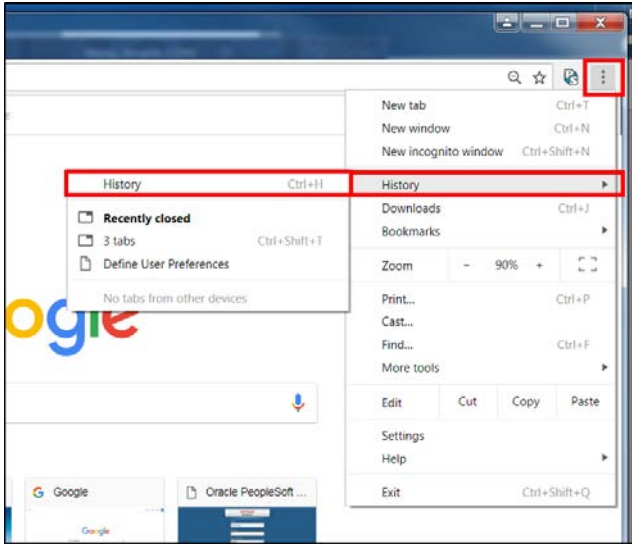
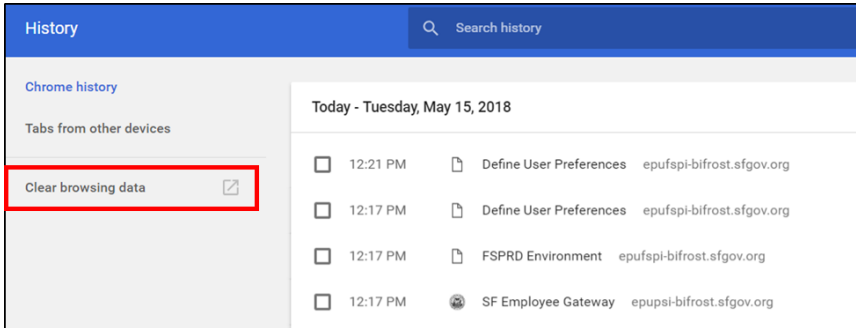
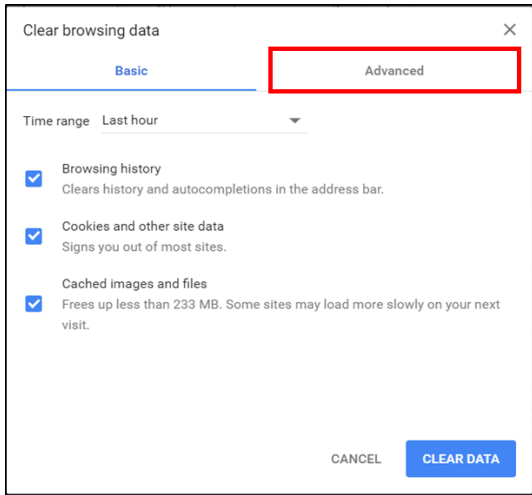


Clearing Your Cache in Internet Explorer		
5A.	<p>If you are using Internet Explorer, go to the Tools icon and click on Internet Options. Then, in the pop-up box that appears, click on the “Delete” button in the Browsing History section on the General tab.</p>	
5B.	<p>The pop-up box on the right will now appear. Make sure all of the check boxes are marked (except for the “Preserve Favorites Website Data” box) and click “Delete”.</p>	
5C.	<p>This pop-up box will disappear, bringing you back to the Internet Options box. Click the “Apply” button and then “OK”. Close your browser and then re-open it. Your cache should be cleared.</p>	

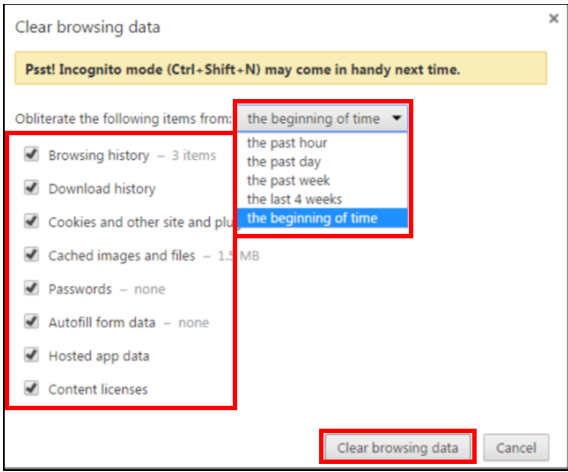


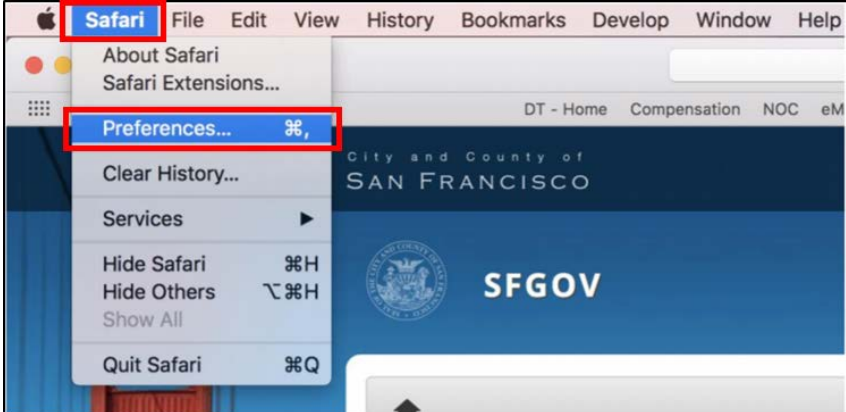
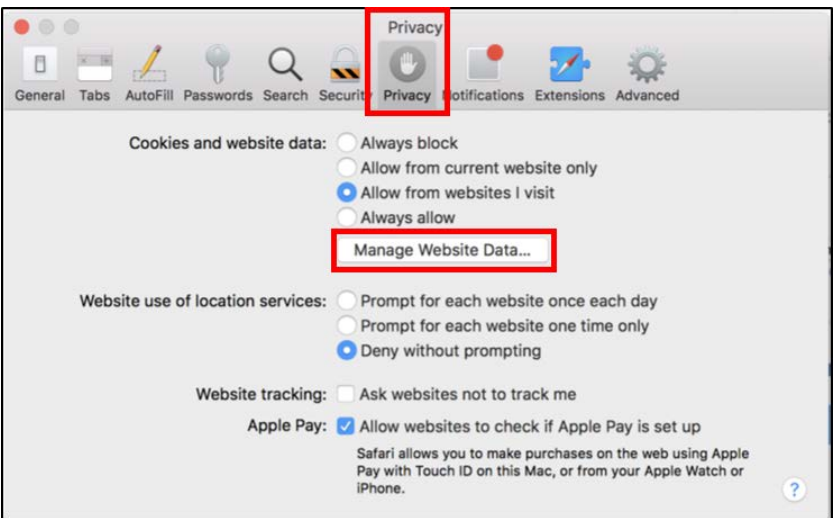
Clearing Your Cache in Firefox		
6A.	In Firefox, type the Ctrl + Shift + Delete keys all at once. This will bring up the pop-up box shown to the right. Change the “Time range to clear” field to “Everything”.	
6B.	Make sure all of the check boxes are marked as shown on the right.	
6C.	Click the “Clear Now” button. Close your browser and then re-open it. Your cache should be cleared.	



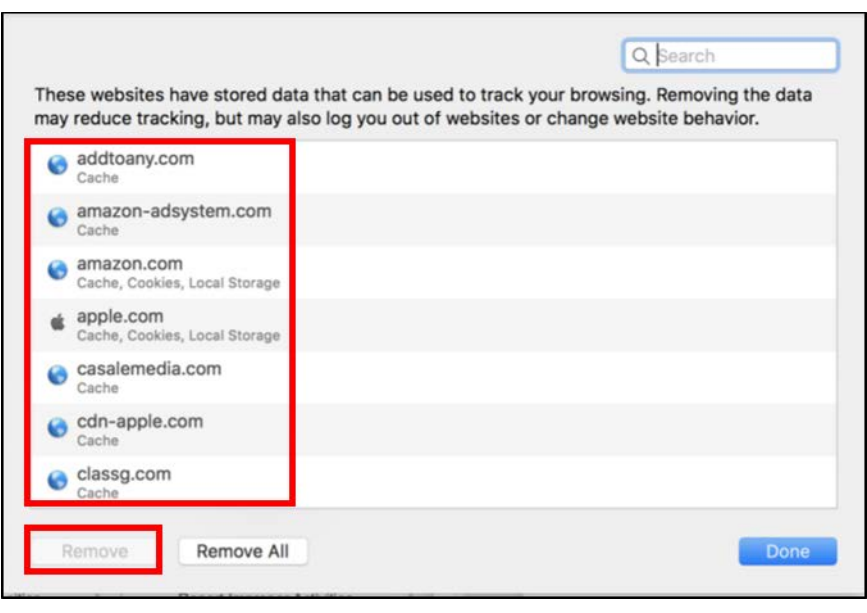
Clearing Your Cache in Chrome		
7A.	In Chrome, type Ctrl + H or click on the Menu icon, then on the History pull-down menu, and then on History.	 <p>A screenshot of the Google Chrome browser window. The menu icon (three vertical dots) in the top right corner is highlighted with a red box. The 'History' menu item is also highlighted with a red box. The 'History' pull-down menu is open, showing options like 'Recently closed', '3 tabs', and 'Define User Preferences'.</p>
7B.	Click the “Clear browsing data” button.	 <p>A screenshot of the Chrome 'History' page. The 'Clear browsing data' button is highlighted with a red box. The page shows a list of browsing history items for 'Today - Tuesday, May 15, 2018'.</p>
7C.	This will bring up the window shown to the right. Click on the Advanced tab.	 <p>A screenshot of the 'Clear browsing data' dialog box. The 'Advanced' tab is selected and highlighted with a red box. The dialog shows options to clear browsing history, cookies, and cached images. The 'Time range' is set to 'Last hour'. There are 'CANCEL' and 'CLEAR DATA' buttons at the bottom.</p>



<p>7D.</p>	<p>Change the pull-down menu to show “the beginning of time” and make sure your boxes are marked as shown.</p> <p>Click the “Clear browsing data” button.</p> <p>Close your browser and then re-open it. Your cache should be cleared.</p>	
-------------------	--	--

Clearing Your Cache in Safari		
<p>8A.</p>	<p>In Safari, click on the “Safari” pull-down menu and then click on “Preferences...”</p>	
<p>8B.</p>	<p>In the pop-up box that appears, click on the “Privacy” icon and then click the “Manage Website Data” button.</p>	



8C.	<p>This will bring up a list of websites. Choose the one that relates to the FSP website [it may say something like epufspi-bifrost.sfgov.org] and click “Remove”. If you are so inclined, you could decide to click “Remove All” instead in order to clear the data from all of these websites.</p>	
8D.	<p>Click to remove this data in the warning pop-up box and close the Safari Preferences window.</p>	