



Introduction to SF MRA Funds Finder Tool & Public Awareness Campaign

September 2024

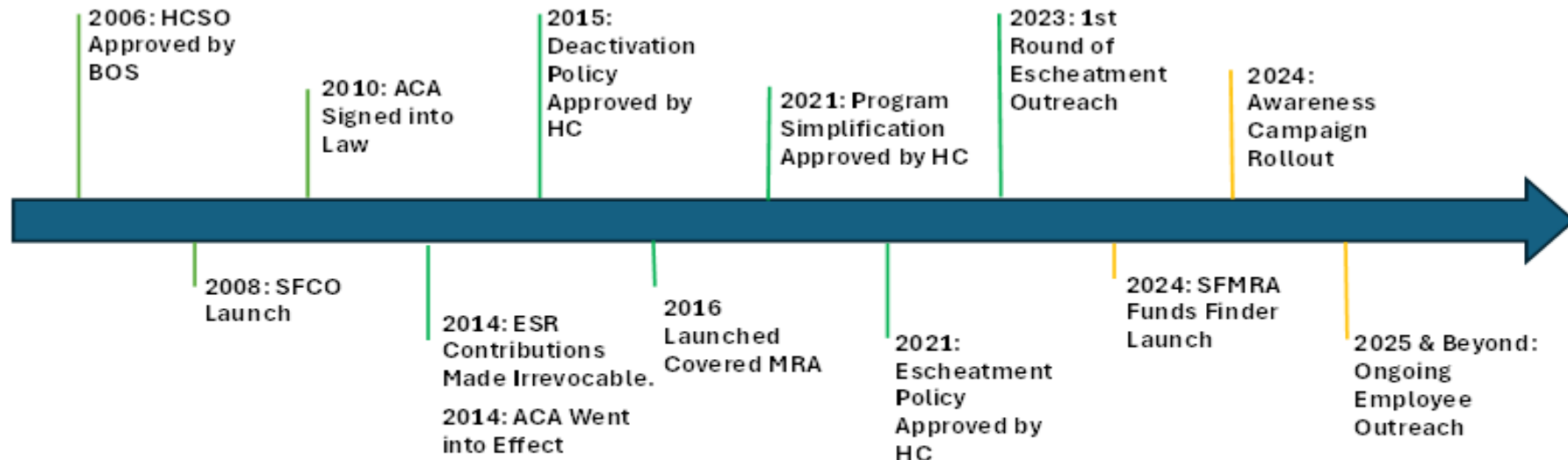




Agenda

1. Level-setting – program overview
2. Two project launches in September
 - a. **An online SFMRA Funds Finder tool**
 - b. **Public awareness campaign**
3. Communication plan
4. Open discussion, and Q&A
5. Recap and Adjournment

1. Level-Setting



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Acronyms:

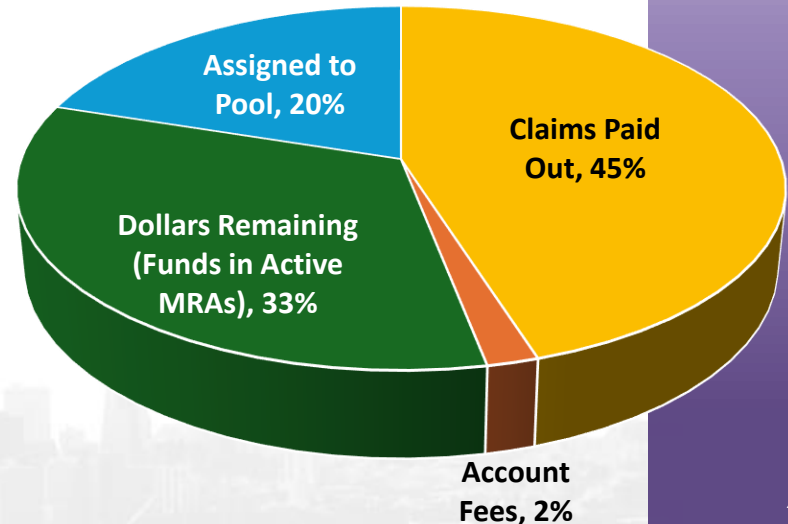
- HCSO - Health Care Security Ordinance
- SFCO - SF City Option
- ACA - Affordable Care Act
- HAO - Healthy Airport Ordinance
- ESR - Employer Spending Requirement



1. Level-Setting

- ✓ \$1.9 billion ESR contributions made by 5,100 Employers for nearly 460,000 Employees
- ✓ Employees can get reimbursed for their eligible medical expenses
- ✓ 80% of the funds collect have either been paid out or in active accounts
- ✓ Its escheatment policy approved in 2022 and implemented in 2023
- ✓ 1st escheatment expected in 2026

	Dec-23	Jun-24	
Claims Paid Out	\$681M	\$784M	45%
Account Fees	\$32M	\$35M	2%
Funds in Active SF MRAs	\$534M	\$566M	33%
Assigned to Pool	\$371M	\$346M	20%
Total	\$1,618M	\$1,731M	100%



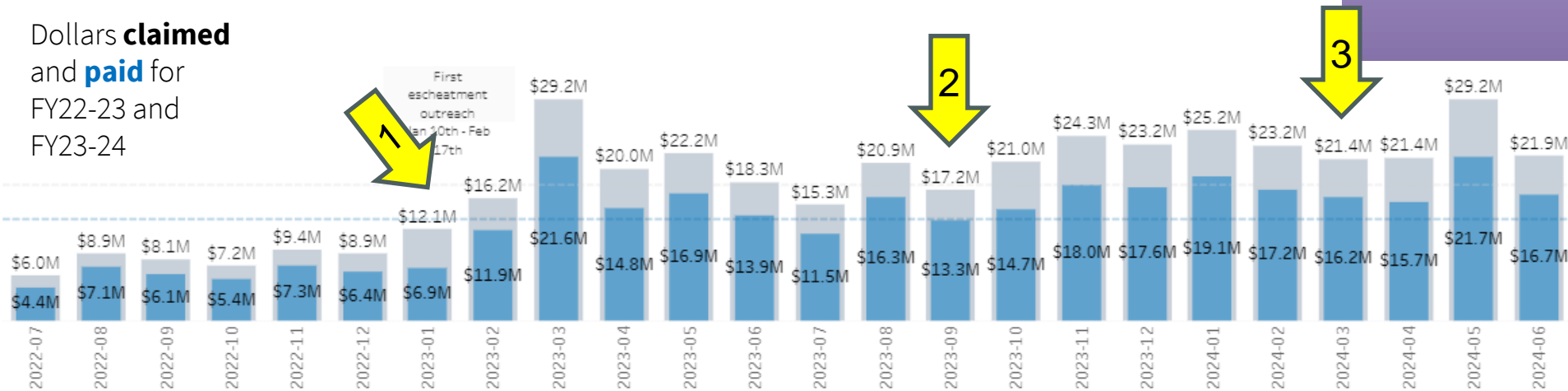


1. Level-Setting

Program Overview (Continued)

- ✓ To maximize utilization of the funds, three rounds of enhanced program outreach have occurred in January 2023, September 2023, and March 2024, with additional campaigns planned in the future
- ✓ Two new projects are launching in September:
 - SF MRA Funds Finder tool**
 - Public awareness campaign**

Dollars **claimed** and **paid** for FY22-23 and FY23-24





2a. SFMRA Funds Finder

Goals

- a. What is the SF MRA Funds Finder tool?
- b. What are the goals of this tool?
 - **Reduce customer calls as individuals can self-serve and search if they have funds available**
 - **Better overall customer experience**
 - **Reduce the number of enrollment forms that require manual processing**
- c. How does it work?

2a. Funds Finder - Landing Page



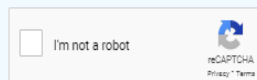
English ■ Español ■ 中文 ■ Tagalog

Welcome to the SF MRA Funds Finder

You may have existing funds waiting for you in a San Francisco Medical Reimbursement Account (SF MRA). Find out if your past or current employer contributed funds on your behalf, by entering the following information:

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Date of Birth (MM/DD/YYYY)*	Last Four Digits of Social Security Number*
<input type="text"/>	<input type="text"/>

The information you enter is confidential and will only be used to search our records for an account match.



Possible outcomes when entering information:

1. User matches the SFCO database and has never enrolled
2. User matches and already has an SFMRA account
3. User matches some but not all of the data fields (partial match)
4. User does not match the SFCO database
5. User's funds have already been escheated after the 1st escheatment in 2026



Source: San Francisco City Option (n.a.). *Welcome to the SF MRA Funds Finder*. Accessed 4/29/24.
<https://sfmrafundsfcityoption.org/SFMRAFundsSearch.aspx>

2a. Funds Finder–Enrollment Page



SFMRA
YOUR ACCOUNT FOR HEALTH COSTS

English ■ Español ■ 中文 ■ Tagalog

Access Your Funds

You may have existing funds waiting for you, from a past or current employer. Our records show that you have not yet completed your SF MRA Enrollment Form. For more information about the SF MRA benefit program, visit our [FAQs](#) page.

Name: First Last

Available Balance

\$xxx.xx

Current Balance as of

MM/DD/YYYY

Spend Your Funds By

MM/DD/YYYY

You have 3 years, starting from the date of the last activity on your account, to spend your funds. This date resets after new account activity. Examples of new activity include completing your SF MRA enrollment and filing a claim.

Enroll in SF MRA

Complete your SF MRA Enrollment Form before you can access your funds.

[Enroll Now](#)

Source: "RE: Hold for the Look Up Tool review and demo" (I. Staiculescu, personal communication, January 10, 2024)

[Back to Search](#)



2b. Public Awareness Campaign

Goals and Costs

a. What are we planning to do?

Print	Digital
✓ BART/Muni 2-sheet posters	❖ Digital billboard
✓ BART interior cards	❖ Digital liveboards
✓ Service Center flyer & employer poster	❖ Social media (organic)
✓ Vinyl billboard	❖ Social media (paid)
	❖ Google display ads
	❖ Website: homepage banner/pop up ad



2b. Public Awareness Campaign

Goals and Costs (Continued)

b. What are the goals?

- Continue promoting the use of SFCO funds to lower Employees' healthcare costs
- Target people commuting to and within San Francisco to generate broader interest in discovering SFCO funds that Employees may not be aware of





2b. Public Awareness Campaign

Costs and Target Launch Date (Continued)

c. What is the estimated costs?

- **\$313,000 (with BART and MUNI advertising)**
- **\$15,500 (without BART and MUNI advertising)**
- **Campaign fund has been budgeted in current TPA contract and the estimated cost here is within budget.**

d. What is our communication plan?



3. Communication Plan

- ✓ The Funds Finder tool has been launched since August to prepare for its promotional activities in September through the awareness campaign launch.

- ✓ Communication plan focusing on:
 1. **Internal socialization and approval (May-Jun 2024)**
 2. **SF MRA Funds Finder tool launch (Sep 2024)**
 3. **Public awareness campaign, directing audience to this new tool (Sep 2024 – Jan 2025)**



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- 5. Recap and adjournment**