City and County of San Francisco

A Step by Step Guide to Becoming a Fully Compliant Supplier

Version 2.4
<table>
<thead>
<tr>
<th><strong>Topic</strong></th>
<th><strong>Purpose of this Article</strong></th>
<th>To provide step-by-step directions to help Registered Bidders become Fully Compliant Suppliers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose of this Article</strong></td>
<td><strong>Audience</strong></td>
<td>Registered Bidders that want to become Fully Compliant Suppliers</td>
</tr>
<tr>
<td><strong>Audience</strong></td>
<td><strong>Author</strong></td>
<td>Kevane Wong</td>
</tr>
<tr>
<td><strong>Author</strong></td>
<td><strong>Version / Update Time</strong></td>
<td>2.4 / 07.01.21</td>
</tr>
<tr>
<td><strong>Version / Update Time</strong></td>
<td><strong>Search Terms</strong></td>
<td>Approved, Fully Compliant, Supplier, “How to”, 12B, Equal Benefits, 14B, LBE, Local Business Enterprise</td>
</tr>
<tr>
<td><strong>Search Terms</strong></td>
<td><strong>Related Content</strong></td>
<td>“Complete Your Business Tax Registration”, “File a 12B Equal Benefits Ordinance Declaration”, “File an Optional 14B Local Business Enterprise Certification”</td>
</tr>
<tr>
<td><strong>Related Content</strong></td>
<td><strong>Outline</strong></td>
<td>See outline in the job aid</td>
</tr>
</tbody>
</table>
TABLE OF CONTENTS

Table of Contents .......................................................................................................................................... 3
Purpose and Description ................................................................................................................................ 3
Topic 1: How to Become a Fully Compliant Supplier ....................................................................................... 4
San Francisco Business Tax Registration: ........................................................................................................ 6
12B Equal Benefits Ordinance Declaration: .................................................................................................. 16
OPTIONAL - 14B Local Business Enterprise Certification: .............................................................................. 24

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 Fully Compliant 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. 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 a Fully Compliant Supplier).

- **Fully Compliant 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 a Fully Compliant 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 A FULLY COMPLIANT SUPPLIER**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | If you are already a Registered Bidder, then you can follow the steps to become a Fully Compliant Supplier. Go to the SF City Partner website at [https://sfcitypartner.sfgov.org](https://sfcitypartner.sfgov.org). Click on the “Help” pulldown menu and click on “Become a Supplier”.

![SF City Partner website](https://sfcitypartner.sfgov.org)
2. On the Become a Supplier page, you will see that there are two main parts to becoming a Fully Compliant 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/).
4. 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.

5. 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.

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.
5B. 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, click on the [http://sftreasurer.org/businessregistration](http://sftreasurer.org/businessregistration) link shown below and follow the directions on the screen.

Steps 5C-5H show the registration form that you will need to complete.
5C. Complete the Ownership Information page.
5D. Complete the Contact Information page.
5E. Complete the Location Information page.
5F. Continue to answer the questions on the Contact Information page.
5G. Continue to answer the questions on the Contact Information page.
5H. Complete the Registration Fees page.
51. If you have questions on the tax registration forms, the Treasurer & Tax Collector Help Center can be accessed via https://sftreasurer.org/help-center or via 311 (or 415-701-2311).

6. Once your Business Tax Registration has been processed and entered into our 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 and your login will 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.
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.
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](image)

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 if you are having issues with this login process.

![Log In Page](image)
10. After you have logged in, you should be taken directly to the 12B Declaration page. If you land on the main Workcenter page instead, **click on the 12B Declaration hyperlink**.

11. **Click on the Add a New Value tab.** The fields on this page should already be prepopulated with the SetID field showing “SHARE”, the Declaration Number field showing “NEXT”, the Declaration Type showing “Bidder”, and the Bidder ID field showing your Bidder ID #. **Click “Add”** and you will be brought to the 12B Compliance Declaration page, which is shown in the following four screens.
12. In the top part of the 12B Declaration, 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.

---

**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, 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. If you need help with what documents you can use, please contact the Contract Monitoring Division’s Equal Benefits Unit at CMD.EqualBenefits@sfgov.org.

- **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:** Carefully read and answer the compliance questions.
14. In the “Benefits Question” section, carefully read and 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.
15. **Carefully read and answer the questions in the “Company Benefit Policy” section.**

The “Other Supporting or Required Documentation” section can be used to upload additional supporting documents for your 12B Declaration.

The “Comments” section can be used to add additional information.

Read the agreement language and **click “Submit” when your 12B Declaration is completed**. If you need to save your progress and return later, you can click on the “Save” button.
16. After you have submitted your 12B Declaration, the system will generate a Declaration Number, which will show at the top of your 12B form. We suggest that you now print or download a copy of your 12B Declaration for your records.

You will now need to wait for the City’s Contract Monitoring Division to process your 12B Declaration. They will notify you by email when they have made a compliance determination.


18. If you have any questions about the 12B process, you can contact the Equal Benefits Unit for the Contract Monitoring Division (CMD) at CMD.EqualBenefits@sfgov.org; 415.581.2310.
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 if you are having issues with this login process.

22. After you have logged in, you should be taken directly to the 14B Certification page. If you land on the main Workcenter page instead, click on the 14B Certification hyperlink.

23. On the 14B Certification Application page, click on the Add a New Value tab. The fields on this page should already be prepopulated with the SetID field showing “SHARE”, the Application Number field showing “NEXT”, the Applicant Type showing “Bidder”, and the Bidder ID field showing your Bidder Account number. Click “Add” and you will be brought to the 14B Certification Application page, which is shown in the following four screens.
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.
25. In the “Location and Contact Information” part of the 14B Certification Application, 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.
26. Answer the questions and upload any required documentation in the “Organization Information” section.
27. Answer the questions and upload any required documentation in the “Board of Directors” and “Employee Information” sections.

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.

Click “Submit” when your 14B Certification form is completed. If you need to save your progress and return later, you can click on the “Save” button.
28. After you have submitted your 14B Certification, the system will show a pop-up box indicating that your application has been submitted. Click the Return button on this pop-up box. The system will now generate an Application ID Number for your 14B Certification Application, which will show at the top of your 14B form. We suggest that you now print or download a copy of your 14B Certification Application for your records.

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.

Questions?

If you have any questions related to the SF City Partner system, contact User Support at 415.944.2442 or via email at sfcitypartnersupport@sfgov.org.

If you have any questions about the 14B criteria for certification, please contact the Contract Monitoring Division (CMD) at 415.581.2310 or via email at lbecert@sfgov.org.