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2 Introduction

2.1 Welcome to eDisclosure™

Welcome to SouthTech Systems' eDisclosure[™], your electronic solution for streamlining the filing and submission of FPPC Form 700 (Statement of Economic Interests).

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees who make or participate in the decision-making process to publicly disclose their personal assets and income. They also must disqualify themselves from participating in decisions which may affect their personal economic interests. The Fair Political Practices Commission (FPPC) is the California state agency responsible for requesting this process, interpreting statutes and issuing the Statement of Economic Interests Form 700. (Source: Form 700 Statement of Economic Interests)

With eDisclosure[™], you can file your Form 700 electronically, 24/7, in the privacy of your own secured filing area. This eDisclosure[™] *Filer's Guide* walks you, as a filer, through the following processes:

- Securely filing and submitting an FPPC Form 700 to your filing officer
- Easily amending prior forms
- Quickly copying information from prior years' forms

2.2 Defining "Disclosure"

(Source: Conflicts of Interest / Form 700 / COI Codes, Copyright 2009)

The purpose of financial disclosure is to alert public officials to personal interests that might be affected while they are performing their official duties (i.e., making governmental decisions). Disclosure also helps inform the public about potential conflicts of interest.

Public officials at every level of state and local government must disclose their personal financial interests. Elected officials, judges and high-ranking appointed officials generally have the most comprehensive disclosure requirements.

These include disclosure of the following:

- Investments in business entities (e.g., stock holdings, owning a business, a partnership)
- Interests in real estate (real property)
- Sources of personal income, including gifts, loans and travel payments
- · Positions of management or employment with business entities

For most other officials, including employees of state and local government agencies, it is up to the agencies that employ them to decide what their disclosure requirements are. Each state and local agency must adopt a conflict of interest code tailoring the disclosure requirements for each position within the agency to the types of governmental decisions a person holding that position would make.

For example, an employee who approves contracts for goods or services purchased by her agency should not be required to disclose real estate interests, but should be required to disclose investments in and income from individuals and entities that supply equipment,



materials, or services to the agency (Gov. Code Sections 87301 and 87302).

Unpaid members of boards and commissions and consultants to state and local government agencies also may be required to disclose their personal financial interests (even if they have nothing to disclose) if they make or participate in making governmental decisions that could affect their private financial interests.

Disclosure is made on a form called a "Statement of Economic Interests" (Form 700). The form must be filed each year. Filed forms are public documents that must be made available to anyone who requests them.

2.2.1 Individuals Subject to Filing

(Source: Form 700 Statement of Economic Interests)

- Elected and appointed officials and candidates listed in Government Code Section 87200.
- Employees and appointed officials filing pursuant to a conflict-of-interest code. Obtain your disclosure categories, which describe the interests you must report, from your agency. They are not part of the Form 700.
- Candidates running for local elective offices that are designated in a conflict-of-interest code (for example, county sheriffs, city clerks, school board trustees, and water board members).
- Members of newly created boards and commissions not yet covered under a conflict-ofinterest code.

2.2.2 Filing Deadlines

(Source: Form 700 Statement of Economic Interests)

Annual Statements

<u>March 1</u>		April 1			
•	Elected State Officers	Most other filers. Individuals filing under			
•	Judges and Court Commissioners State Board/Commission Members listed in Government Code Section 87200	conflict-of-interest codes in city and county jurisdictions should verify the annual filing date with their local filing officer.			

Assuming, Leaving, and Initial Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict-of-interest code.

Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents.

Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. Obtain amendment schedules from your Filing Officer or interactively at <u>www.fppc.ca.gov</u>.



2.3 About SouthTech Systems

SouthTech Systems is a software development and system integration firm with offices in Riverside, California. We specialize in custom turnkey business government solutions, as well as software development for public agencies and the private sector.

Our company's focus is to equip public agencies with cost-effective and scalable applications that utilize database, digitized documents, workflow and electronic document management technologies. We provide the analysis, design, implementation, training, support and maintenance of enterprise-wide systems. Our solutions automate manual processes and improve staff productivity. As a premier software solution provider, we create, deploy, support, and maintain high-quality client-server and browser-based software solutions.

SouthTech Systems, Inc. offers not only the necessary technical knowledge, but also the indepth government operational experience to make our software solutions a success. We understand how your business works, and we can blend cost-effective new technology with dayto-day operations to make your jobs easier and to provide you with an efficient workflow.

Our software products are specifically designed to meet the needs of government offices including County Recorders, County Clerks, Clerk of the Board of Supervisors, Election Officials and City Clerks. Each of our systems is designed to be highly configurable and completely turnkey, so that they meet the immediate, individual needs of our clients and their respective agencies.

2.3.1 DisclosureDocs[™] and eDisclosure[™] Development History

In partnership with the county of Ventura, SouthTech Systems developed the first generation of DisclosureDocs[™] in 2000, the company's flagship product for managing the business process of the FPPC-mandated Conflict of Interest Code / Form 700. Since 2000, multiple California counties have acquired DisclosureDocs[™]. SouthTech Systems has since become an expert in the field of developing software solutions that facilitate the submission of Conflict of Interest filings.

In 2006, the County of Orange had a vision that all county Conflict of Interest filers would have the ability to electronically submit Conflict of Interest Form 700. SouthTech Systems, in turn, redeveloped DisclosureDocs[™] and created eDisclosure[™] to support the electronic submission process. The County of Orange subsequently applied for legislation change that would allow filers to electronically file Form 700.

In 2008, the legislation change was successfully passed in the form of a three-year pilot program for four California counties. Individuals in these counties who are designated filers by their authority's Conflict of Interest Code may file assuming, annual and leaving statements by completing the FPPC-mandated Form 700 online and submitting it to their Filing Officer electronically. Note that for organizations that cannot file and submit electronically, eDisclosure[™] still streamlines the paper filing process.

After three years, the pilot counties will report on the results of the program, which—if successful—will allow the legislation to be opened up to all organizations that file Form 700.



2.4 Contact / Support Information

Should you have any questions about our system, please contact your Filing Officer, who will be more than happy to assist you.

2.5 About the Documentation

The eDisclosure[™] *Filer's Guide* includes the following documentation:

- ☑ Detailed descriptions of eDisclosure[™] features for Filers
- ☑ eDisclosure[™] basic operation for Filers with step-by-step tutorials

2.6 Useful Links

- 1. http://www.fppc.ca.gov/Act/2012 Index.pdf
- 2. http://fppc.ca.gov/forms/700-12-13/Form700-12-13.pdf
- 3. http://www.fppc.ca.gov/forms/700-12-13/RefPamphlet12-13.pdf
- 4. <u>http://www.fppc.ca.gov</u>

2.7 Definitions

(Source: Reference Pamphlet)

The purpose of this section is to explain key terms in the filing process. For additional terms and examples, please visit the FPPC Website.

Annual Statement: Generally, the period covered is January 1 through December 31 of the year that you are filing for. If the period covered by the statement is different than January 1 through December 31, you must specify the period covered. Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict-of-interest code amendment and disclose under the new disclosure category through the end of the reporting period.

Assuming Office Statement: If you are a newly appointed official or are newly employed in a position designated in a state or local agency's conflict-of-interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in. Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or positions subject to confirmation by the State Senate or the Commission on Judicial Performance, your assuming office date is the date you were appointed or nominated to the position.

Code Filer: An individual who has been designated in a state or local agency's conflict-ofinterest code to file statements of economic interests.

Conflict of Interest: A public official or employee has a conflict of interest under the Act when all of the following occur:



- The official makes, participates in making, or uses his or her official position to influence a governmental decision;
- It is reasonably foreseeable that the decision will affect the official's economic interest;
- The effect of the decision on the official's economic interest will be material; and
- The effect of the decision on the official's economic interest will be different than its effect on the public generally. Check the FPPC website (<u>www.fppc.ca.gov</u>) for a fact sheet entitled, "Can I Vote? Conflict of Interest Overview."

Conflict-of-Interest Code: The Act requires every state and local government agency to adopt a conflict-of-interest code. The code may be contained in a Regulation, policy statement, or a city or county ordinance, resolution, or other document. An agency's conflict-of-interest code must designate all officials and employees of, and consultants to, the agency who make or participate in making governmental decisions that could cause conflicts of interest. These individuals are required by the code to file statements of economic interests and to disqualify themselves when conflicts of interest occur. The disclosure required under a conflict-of-interest code for a particular designated official or employee should include only the kinds of personal economic interests he or she could significantly affect through the exercise of his or her official duties. For example, an employee whose duties are limited to reviewing contracts for supplies, equipment, materials, or services provided to the agency should be required to report only those interests he or she holds that are likely to be affected by the agency's contracts for supplies, equipment, materials, or services.

Contact Person: The person who is responsible for managing filers at the agency level. A Contact Person can also be a Filing Official. In most cases, the Filing Official is the Contact Person, but not always.

Disclosure Categories: The section of an agency's conflict-of-interest code that specifies the types of personal economic interests officials and employees of the agency must disclose on their statements of economic interests. Disclosure categories are usually contained in an appendix or attachment to the conflict-of-interest code. Contact your agency to obtain a copy of your disclosure categories.

Expanded Statement: Some officials or employees may have multiple filing obligations (for example, a city council member who also holds a designated position with a county agency, board, or commission). Such officials or employees may complete one expanded statement covering the disclosure requirements for all positions and file a complete, originally signed copy with each agency.

Filing Officer: The Filing Officer is the person or agency which receives and retains original statements of economic interests.

Filing Official: The Filing Official is the person who receives and retains original statements of economic interests and is required to make and retain a copy of such statements and forward the original to the Filing Officer.

Initial Statement: If your office or position has been added to a newly adopted or newly amended conflict-of-interest code, use the effective date of the code or amendment, whichever is applicable. Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans,

gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment is reportable.

Filing Amendments: If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised. It is not necessary to re-file the entire form.

Leaving Office Statement: Generally, the period covered is January 1 through the date you stopped performing the duties of this position. If the period covered differs from January 1 through the date you stopped performing the duties of this position, the period covered must be specified. Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported.



3 Getting Started

3.1 Filer Access to eDisclosure™

As a filer, you will be granted account access to eDisclosure[™] by your Filing Officer. Once your account has been successfully created, you'll receive two automated emails; the first being a "Welcome" email from your Filing Officer and the second, a new account notification that provides you with your eDisclosure[™] username and password.

To:	Eric Johnson	
Cc		
Subject:	CONFLICT OF INTEREST FORM 700 – ASSUMING OFFICE	
Congrat positio code, y days af	ulations on your appointment to the Department of Development Services. Our records indicate that you assumed your n on 08/11/2009. As an official or employee whose position is designated in the agency's conflict of interest ou are required to file an assuming office Form 700 Statement of Economic Interests, Form 700 no later than 30 ter the date you assumed office.	
You are have ac office one tim	now eligible to file your Form 700 electronically in the privacy of your own personal secured filing area. You cess to this area 24/7 and online help is available. All positions that you are required to file an assuming Form 700 will be listed in your personal filing area. You are not required to complete or finalize your filing at e; it is available to you 24/7.	
COUNTY/ filing	CITY DEPARTMENT/AGENCY FILERS: Once you have finalized and submitted your Form 700 electronically, a copy of your will be saved with the date and time of filing in your online e-filing cabinet.	=
87200 F 700 to Fair Po e-filin	ILERS: Once you have completed your form, the system will prompt you to print, sign and mail your completed Form the County/City Clerk who will date stamp and receive your Form 700, retain a copy and forward the original to the litical Practices Commission. A copy of your filing will be saved with the date and time of filing in your online g cabinet.	
We hope	you enjoy your experience and find e-filing easy to use.	
	Larry Smith, County/City Clerk	
Program	Location: https://www.youredisclosurewebsite.gov	•

Figure 1: Sample Welcome Email

To:	Eric Johnson	
Cc		
Subject:	Your Conflict of Interest eFile Login and Password	
Conflict The Logi	of Interest eFile account created registered to this email address.	
The pass	sword is : xQ*26_zS write this down and save for later reference.	=
If you t or conce	chink you've received this email in error, or if you have any questions erns, please contact us at <u>response@agency.com</u>	
System L	.ogon Link: <u>https://www.youredisclosurewebsite.gov</u>	•

Figure 2: Sample New Account Notification Email



3.2 Logging into eDisclosure™

Once your Filer's account has been activated, simply follow the instructions below to login:

1. First, ensure that you are on an Internet-connected computer. Then, click the system link that was included in your new account notification email. Note that your agency's link will replace the red highlighted link below.





- 2. A new Web browser window will open and you will be automatically directed to the eDisclosure[™] Website. Here, enter the Login ID and Password that appears in your new account notification email. Depending on your organization, you may also need to input a unique security code that appears on the login page. After you have entered this information, click the "Log In" button.
 - If you have forgotten or lost your password, click Forgot Password?. You will be asked to provide your Login ID, last name, security question and security answer (if you do not know or have not set up your security question and answer, please contact your Filing Officer for assistance). Once you submit your password request, the system will automatically generate, encrypt and send you a new password. Neither SouthTech Systems nor your Filing Officer will see your password.
 - If you have forgotten or lost your Login ID, click Forgot Login ID?. You will be asked to provide your last name, email address, security question and security answer (if you do not know or have not set up your security question and answer, please contact your Filing Officer for assistance). Once you submit your request, the system will email you your Login ID.



6	
Login	Welcome to eDisclosure
Login ID: abrown@agencyq.gov Password: Log In Forgot Password? Forgot Login ID?	You can complete your form online, print it, sign it and mail it to the County/City Clerk's office at: County/City of yourname, County/City Clerk Department ATTN: Form 700 Personnel 8600 W. Broad St. Your County/City , CA 90004 This application is ADA compliant. If you encounter any problems, please email us at <u>Clerk Response</u> . We hope that you enjoy the ease of completing your application online. <u>FPPC web site</u>
DEPARTMENT/AGENCY Department/Agency Contact List	Fair Political Practices Commission Hotline Contact the Fair Political Practices Commission Toll Free Help Line at 1-866-ASK-FPPC (1-866- 275-37) Reform Consultant to receive advice and ask technical questions. <u>FPPC web site</u>

Should you need assistance during the login process, you may click the Department / Agency Contact list link to view contact information for your organization.

DEPARTMENT/AGENCY
Department/Agency Contact List

Figure 5: Department / Agency Contact list link

3. If this is your first time logging in after your new account has been created, you will need to create a new password. Please follow the security-requirement rules on the password creation page. You will also be asked to select and answer a security question. This security question will be asked if you ever forget your password.



lease create a new pass	word. Your password must be at least:						
a. 8 characters							
b. Contain an upper and a lower case letter(s)							
c. Contain a digit(s)							
d, Contain a special cl	haracter: $\sim ! @ # $ % ^ & * () - = _ +$						
Temporary Password:							
New Deceword:							
NOW Password,							
Confirm New							
Confirm New Password:	[
Confirm New Password:							
Confirm New Password: elect one of the security	questions and type an answer to this question.						
Confirm New Password: elect one of the security Security Question	questions and type an answer to this question.						
Confirm New Password: elect one of the security Security Question (Select from list):	questions and type an answer to this question. What is your favorite color?	R					
Confirm New Password: elect one of the security Security Question (Select from list): Security Answer:	questions and type an answer to this question. What is your favorite color?	P					
Confirm New Password: elect one of the security Security Question (Select from list): Security Answer:	questions and type an answer to this question. What is your favorite color?	Ĥ					

3.3 Navigating eDisclosure™

After logging into eDisclosure[™], you can navigate through the system using the menu options on the left side of the page.





Figure 7: Navigation / Menu Options

Please refer to the next section for detailed information on each navigation menu option.



4 The Login Menu

4.1 Login Menu Options

The Login Menu appears after you have logged into eDisclosure[™] and contains the following options:

- Home Information / Announcements from your Department or Agency
- Change Password Update your account with a new password
- Change Login ID Update your account with a new login ID / username
- Change Email Update the email address where you receive system announcements and messages.



Figure 8: The Login Menu

4.2 Home

This page looks similar to your login page, in that it contains the same information and announcements from your Department or Agency. However, because you are already logged in, you will not see the Login box on the left side of the page.

4.3 Change Password

To change your password, input your old password and your new password twice. Your new password must follow the security-rules indicated on the password-reset page.

Your password must b	e at least:
a. 8 characters b. Contain an uppe c. Contain a digit(d. Contain a specie	er and a lower case letter(s) s) al character: ~) @ # \$ % ^ B * () - = _ +
Temporary Password: New Password:	
Confirm New Password:	
Submit	
	Figure 9: Change Your Password



4.4 Change Login ID

To change your Login ID, input your password and your new Login ID.

Password:	••••••
New Login ID:	ejohnson
Submit	

Figure 10: Change Your Login ID

4.5 Change Email

To change the email address that receives system notifications, input your password and your new email address.

Password:	•••••
New E-mail:	ejohnson@agencyq.gov
Submit	

Figure 11: Change Your Login ID



5 The Filer Menu

5.1 Filer Menu Options

The Filer Menu appears after you have logged into eDisclosure[™] and contains the following options:

- **Current Filing** A list of positions that requires submission of FPPC Form 700 (Statement of Economic Interests). Note that this list contains the following information:
 - Position
 - Agency
 - Filing Type
 - Filing Year
 - Due Date
 - Disclosure Category (if hyperlinked, you can click the link to view a description of the corresponding disclosure category)
 - Period covered (the date range that the filing covers)
- **Previous Filings** A list of FPPC Form 700 (Statement of Economic Interests) filings that you have already submitted, along with actions you can take for submitted files.
- View Profile View your filer profile—including your positions—and update your contact address.

5.2 Current Filings

Your "Current Filings" page lists positions that require you to file a Statement of Economic Interest Form 700.

(\bigcirc)									eDisclosure
ORGANIL				We	Icome Alicia i	Brown			_
Login	۲	_							
Home Change Password Change Login ID		Your #	position(s) in the following	Department(s)/Agency(ies) r	equires you to	o file the Year •	following S Due Date	tatement of Economic Disclosure Category	Interests: Period Covered
Sign Out			Data & Information Specialist (2)	Division of Special Education	Annual	2010	4/1/2011	Cat-03	10/08/09-12/31/10
Filer	۲	St	art Filing Now						
Current Filings									
Previous Filings View Profile									



Note that when "Current Filings" is selected, the menu options will update to provide you with helpful tips and references. You may sort the "Current Filings" table by the following columns:

- Position
- Agency
- Filing Type
- Filing Year
- Due Date



- Disclosure Category (if hyperlinked, you can click the link to view a description of the corresponding disclosure category)
- Period covered (the date range that the filing covers)

Note that you may have one or multiple positions listed in the Current Filings table. From this page, you can proceed with a filing or navigate to any other eDisclosure[™] section. For detailed instructions on filing, please refer to Chapter 6 in this document.

5.3 Previous Filings

Your "Previous Filings" page lists prior submissions of FPPC Form 700 that you have made through the eDisclosure™ system.

#	Position	Agency	Туре	Year *	Due Date	Filed Date *	Disclosure Category
	Data & Information Specialist (2)	Division of Special Education	Assuming	2009	11/07/2009		Cat-03

Figure 13: Prior Filings

Note that when "Previous Filings" is selected, the menu options will update to provide you with helpful tips and references. You may sort the table by the following fields:

- Position
- Agency
- Type
- Year Filed
- Due Date
- Filed Date
- Disclosure Category (if you hover over the category number, you can view its description)

Note that you may have one or multiple positions listed in the table. At the bottom of the page, you will find buttons that allow you to view, print, save and amend your prior files, as well as generate a "Filings Report."

View	Print	Save Locally	Amend	Filings Report

Figure 14: Previous Filings Options

For detailed instructions on viewing, printing and amending your prior filings, and generating a "Filings Report," please refer to Chapter 7 in this document.



5.4 View Profile

By selecting "View Profile" from the navigation menu, you can view your filer profile—including your positions—and update your contact address. Note that when "View Profile" is selected, the menu options will update to provide you with helpful tips and references.

5.4.1 Filer Information

Here, view your Name, Employee Number and Email Address as it appears in the system.

Filer	Personal Information	Positions
	Last Name	Johnson
	First Name	Eric
	Middle Name	William
	Employee Num	99999
	E-mail Address	ejohnson@agencyq.gov

Figure 15: Filer Information

Note that these fields cannot be edited. To change your Email Address, you must go through the Login Menu.

5.4.2 Contact Information

Within the Contact Information tab, view your contact (business) address and home (confidential) address. You may edit these fields by clicking the "Edit" button at the bottom of the page. Note that your home address information will not appear on your filing form. It is used only in the event that your Filing Officer needs to contact you and you cannot be reached at your office address.



serring radi				
Address 1	12345 Sepulveda Blvd			
Address 2 City	Los Angeles	State CA	Zip 90028-	
Phone Number	() - ext:		Fax Number (-
Address 1	808 N Falm Tree Ave			-
Address 1 Address 2	808 N Palm Tree Ave	State CA	7:- 01020	
Address 1 Address 2 City Phone Number	BOB N Palm Tree Ave Hollywood	State	Zip 90038	

Figure 16: Contact Information

5.4.3 Position(s) Information

Within the "Positions" tab, review the positions that require you to submit FPPC Form 700. To quickly view your personal business address for a position, simply hover over the respective question mark icon. To view your disclosure requirements for a position, hover your mouse pointer over the position's disclosure category.

Fi	ler Contact In	formation Posit	ions		
	Position	Agency	Start Date	Disclosure Category	Division
2	Data & Information Specialist (2)	Division of Special Education	10/08/2009	Cat-03	

Figure 17: Positions

If you see that a position is incorrectly listed, please contact your Filing Officer to address this issue.



6 The eFiling Process

6.1 Filing FPPC Form 700

6.1.1 Selecting Your Position(s)

To start the filing process for a position that requires submission of FPPC Form 700, navigate to your "Current Filings" page. This page initially provides you with all of the positions that you are required to file Conflict of Interest Form 700. On the left side of the page, the menu options will update to provide you with helpful tips and references.

Note that the table displays the type of filing you are required to submit (e.g. annual, assuming, leaving, etc.). You may place your mouse over the disclosure category code to quickly see what you are required to disclose.

To begin, place a checkmark next to the position(s) that you want to file your statement for at this time and click the "Start Filing Now" button.

	and the second of the second						
Your (position(s) in the following	Department(s)/Agency(ies) re	equires you to	o file the	following S	tatement of Economic	Interests:
#	Position	Agency	Туре	Year *	Due Date	Disclosure Category	Period Covered
	Data & Information	Division of Special	Annual	2010	4/1/2011	C-+ 02	10/00/00 10/01/10

Figure 18: Select Position(s) for Filing



Assuming and Leaving Office statements must be filed within 30 days of assuming or leaving office. You may only file <u>one</u> position at a time.

For annual filings, you can file for multiple positions at the same time. If you select a position that is an "annual" filing, the system will automatically combine all other annual filings as an "expanded statement."

If you would like to file information for each annual filing individually or if you would like to file information for the largest entity only, then you may deselect (or uncheck) the other position(s) and they will not be part of an "expanded" statement.

6.1.2 Selecting Your Schedule(s)

Once you click "Start Filing Now", you will arrive at your "Filing Detail View." Here, you will find the name(s) of the position(s) that you are currently filing for and a list of all schedules that are <u>recommended</u>, based upon that position's disclosure category. If there is a disclosure category that you believe should be completed, but is not checked as recommended, you can select "Yes" and that schedule will be included in your filing.

If you have "no reportable interest" on any or all of the required schedules, please select "No" reportable interests for all that apply.



		Welcome Steve Young				
ing	Details					
e Po	osition(s) you are filing					
ositi	ion	Agency Due Date	Disclosu Category	re /	Period Covere	ed :
arbo	or Master (4)	Harbor Department 4/3/2011	Cat-03		03/04/10-03/	04
iedu	ulas which correspond to the			- den Ales "Des	ommondod" c	
ase	select which schedules you	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by s	electing either the	e Yes or No ra	dio button.	olu
ase elp	select which schedules you	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by so Description	electing either the Recommended	Yes or No ra	dio button. Interests	olu
ase elp	Name Schedule A-1	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by so Description Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%)	ry are checked un electing either the Recommended	Reportable	idio button. Interests No	olu
ase elp	Name Schedule A-1 Schedule A-2	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by so Description Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%) Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater)	ry are checked un electing either the Recommended	Reportable Yes or No ra	dio button. Interests No No	olu
ase elp	Name Schedule A-1 Schedule A-2 Schedule B	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by so Description Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%) Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater) Interests in Real Property	ry are checked un electing either the Recommended	Reportable Yes or No ra Reportable Yes Yes	dio button. Interests No No No	olu
ase elp	Name Schedule A-1 Schedule A-2 Schedule B Schedule C	e financial interests described in your disclosure categor will use under the "Reportable Interests" column by so Description Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%) Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater) Interests in Real Property Income, Loans & Business Positions	Recommended	e Yes or No ra Reportable Yes Yes Yes Yes Yes	dio button. Interests No No No No	olu
ase elp	Name Schedule A-1 Schedule A-2 Schedule B Schedule C Schedule D	e financial interests described in your disclosure catego will use under the "Reportable Interests" column by so Description Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%) Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater) Interests in Real Property Income, Loans & Business Positions Income - Gifts	ry are checked un electing either the Recommended	Reportable Yes or No ra Reportable Yes Yes Yes Yes Yes	dio button. Interests No No No No No	

Figure 19: Filing Detail View



Hover your mouse over a question mark icon it to view the respective Schedule's FPPC instructions.

To go to the next step, click the "Continue" button.

Note that once you have successfully submitted a filing, you will be given the option to copy schedule information from that filing to another when you return to the "Filing Detail View" screen.

#	Position	Agency	Disclosure Category	Filing Type	Filing Year	Finalized *	Due Date	View
	Data & Information Specialist (2)	Division of Special Education	Cat-03	Assuming	2009	04/09/2010	11/07/2009	14

Figure 20: Copy Schedule Info



6.1.3 Reviewing Your Cover Page

CALIFORNIA FORM FAIR POLITICAL PRACTICES A PUBLIC DOCU	TOD STATEM	ENT OF ECONOMIC INTERESTS COVER PAGE	Date Received detail ter ce)*
Please type or print in ink. NAME OF FILER	(LAST)	(FIRST)	(MIDDLE)
Brown		Alicia	
1. Office, Agency, or	Court		
Agency Name			
Division of Special	Education		
Division, Board, Departm	ent, District, if applicable	Your Position	
		Data & Information Specialist (2)
	West Red Balance and Article and		
 If filing for multiple pos 	silions, list below or on an attachment.		
 If filing for multiple pos 	sillons, list below or on an attachment.		
 If filing for multiple pos Agency: 	intonis, list below or on an attachment.	Position:	
If filing for multiple pos Agency:	ittoris, list below or on an attachment. IffiCe (Check at least one box)	Position:	
	ffiCe (Check at least one box)	Position:	÷
If filing for multiple pose Agency: Jurisdiction of Of State Multi-County	ittons, list below or on an attachment. ffiCe (Check at least one box)	Position:	

Figure 21: Cover Page

When you arrive at the "Filing Forms" page, take note of the tabs at the top. Your cover page, as well as individual schedules and instructions, are accessible via these tabs. By default, the "Cover Page" is selected.

Cover Page	Schedule A-1	Schedule A-2	Schedule C	Schedule D	Schedule E
coverrage	Schedule h 1	Scheddie 112	Scheddie e	Scheddie D	School

Figure 22: Cover Page Tab

Also take notice of the icons that appear under the "Cover Page" tab.



Figure 23: "Cover Page" Icons



lcon	Action
6	Toggle between maximized view and restore down.
۹	Zoom in
٩	Zoom out
	Print
0	Online Help
3	Report an Issue
FPPC Hotline	View FPPC Contact Information
	Exit

Note that if you exit the form at this point or any point moving forward (without finalizing / submitting), and return to the "Current Filings" page, the form will be listed under "Pending Filings." You can easily resume—right where you left off—by clicking the "Continue" button. To cancel the pending filing, simply click the "Cancel Filing" button. If you click the "Cancel Filing" button, *all changes will be lost* and that position will re-appear under "Positions Required to File."

Pend	ding	Filings								
	#	Position		Agency	• T)	/pe	Year 🔺	Due Date	Disclosure Category	Period Covered
	0	Data & Inform Specialist (2)	nation	Division of Spe Education	cial Ar	nnual	2010	4/1/2011	<u>Cat-03</u>	10/08/09-12/31/10
	Co	ontinue	Can	cel Filing						

Figure 24: Pending Filings

As you review your cover page, you will find that its fields have been automatically populated by information that eDisclosure[™] has in its system. If you feel that the cover page includes incorrect information, please contact your Filing Officer. These fields include:

- Your Full Name
- Mailing Address
- Office, Agency or Court and Position
- Jurisdiction
- Type of Statement (Assuming Office / Leaving Office / Annual / Candidate)
- Schedule Summary, including number of pages and applicable schedule(s)

6.1.4 Completing Your Schedule(s)

To start filling out a schedule, simply click the respective tab at the top of the page. First, take notice of the icons that appear under the "Schedule" tab(s).





Figure 25: "Schedule" Icons

lcon	Action
	Toggle between maximized view and restore down.
۹	Zoom in
٩	Zoom out
4	Add an additional sheet to the schedule
*	Delete a section from the selected schedule page (sections are numbered from left to right).
₽ <mark>₽</mark> Z	Sort sections alphabetically (from A to Z)
a	Print
	Save
	Help and instructions for the respective schedule
2	Nothing to report on this schedule (removes the selected schedule from your filing)
1	What interests must I disclose? (provides a description of the disclosure category)
3	Report an Issue
FPPC Hotline	View FPPC Contact Information
	Exit

On the Schedule, blank fields require your input. Should you need assistance with or have questions about the respective schedule, simply click the question mark icon is to view detailed reference information.

Note that if you exit the form or navigate to another page, eDisclosure™ will auto-save your modifications.



Interests in Re (Including Rent	al Income)
STREET ADDRESS OR PRECISE LOCATION CITY FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000	STREET ADDRESS OR PRECISE LOCATION CITY FAIR MARKET VALUE S2,000 - \$10,000 S100,001 - \$100,000 Over \$1,000,000 Over \$1,000,000 Over \$1,000,000 Over \$1,000,000 NATURE OF INTEREST Ownership/Deed of Trust Leasehold Yrs. remaining Other IF RENTAL PROPERTY, GROSS INCOME RECEIVED S0 - \$409 S00 - \$100,000 OVER \$10,000 S10,001 - \$100,000 OVER \$10,000 S0URCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

Figure 26: Sample Schedule B

Adobe Acrobat Reader may have highlighted / shaded the blank fields for you (shown in Figure 26), which is dependent upon the application's settings. To confirm Adobe Acrobat Reader's display settings, right-click the form, select "Page Display Preferences" and click "Forms" in the settings window that appears.



Figure 27: Form Page Display Preferences

From here, you can turn your highlight color on or off.



Categories:	General
Documents	Automatically calculate field values
Full Screen	Show focus rectangle
General	Show text field overflow indicator
Page Display	
	Always nide forms document message bar
3D & Multimedia	
Accessibility	
Forms	Highlight Color
Identity	Show border hover color for fields
International	
Internet	Fields highlight color:
JavaScript	Required fields highlight color:
Measuring (2D)	
Measuring (3D)	Auto-Complete
Measuring (Geo)	
Multimedia (legacy)	Off Remember numerical data (e.g., telephone number)
Multimedia Trust (legacy)	
Search	Edit Entry List
Security	The suite complete feature is now off. No suggestions will be made while you ture in form fields. Change
Security (Enhanced)	Basic or Advanced from the drop-down box to turn the feature on.
Spelling	
Tracker	
Trust Manager	
Units	
	Form Data Collection Preferences
	OK Cancel

Figure 28: Highlight Color On / Off

If you have a prior year filing for the same position, your information will be conveniently copied into this year's form. **Note:** Gifts or disposed assets will not be carried over.

If you copied information from a prior filing, be sure to:

- Edit your schedules carefully and delete, remove or enter the sold date for all assets that should not appear, or should be shown as sold / disposed of during this year.
- Add any new information that was not included in a prior filing.

After you have entered all required information, you may proceed with the submission process by clicking the "Finalize Form" button.



Figure 29: Finalize Form

If you attempt to finalize the form without entering all required information, eDisclosure[™] will prompt you with a system error and list all the validation issues that it has found within the form.



	onn	Section	Issue	
S	chedule A-1		Form Not Filed Out.	
S	chedule A-2		Form Not Filled Out.	
S	chedule C		Form Not Filed Out.	
S	ichedule D		Form Not Filled Out.	
S	ichedule E		Form Not Filled Out.	

Figure 30: Validation Issues

When you click "Close," you'll be taken back to the schedule with the validation issues marked in red.

ŧ	SCHED Interests in R (Including Rer	JLE B eal Property tal Income) Eric Johnson
•	STREET ADDRESS OR PRECISE LOCATION	STREET ADDRESS OR PRECISE LOCATION
	115 Maple Drive	115 1/2 Maple Drive
	СПУ	СПУ
✓		
√	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 1/08 \$10,001 - \$100,000 1/08 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 DISPOSED	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$\$2,000 - \$10,000 ///08 \$\$10,001 - \$100,000 ACQUIRED DISPOSED
	NATURE OF INTEREST	NATURE OF INTEREST
✓	Ownership/Deed of Trust Easement	Ownership/Deed of Trust
	Leasehold Other	Leasehold Yrs. remaining Other
	IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED
	\$0 - \$499 \$500 - \$1,000 \$1,001 - \$10,000	\$0 - \$499 \$500 - \$1,000 \$1,001 - \$10,000
	\$10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000

Figure 31: Missing Information Flags

After correctly inputting your information and re-clicking the "Finalize Form" button, you will be prompted to lock your document.





Figure 32: Confirmation Prompt

If you are sure that you would like to proceed, click the "Yes" button.

6.1.5 Submit Filing (when electronic submission is available)

If "Electronic Submission" is not available within your agency or department, please proceed to Section 6.1.6.

On the "Submit Filing" page, you must accept the verification statement to proceed. If you are filing late, you can <u>optionally</u> provide an explanation for the late filing of your form. In Figure 33, the option to electronically submit is available. This option is dependent upon your agency or department. Once you select the "Accept" radio button, all submission / filing buttons will become active.

Late Filing Justification	and the second se	
Your statement of economic intere form.	st is being filed late. Please provide an explanation	on for the late filing of your
Government Code Section 91013 impose economic interests. However, under certa	s a fine of \$10 per day, up to a maximum of \$100, for the in circumstances, all or part of the fine can be waived. Plea	late filing of a statement of use explain.
Reason goes here		-
		<u></u>
Jubmit Filing		
have used all reasonable diligent of my knowledge the information licking the "Electronically Submit of the State of California that the f	e in preparing this statement. I have reviewed the contained herein and in any attached schedul or "File by Paper" button, I certify under penal oregoing is true and correct.	his statement and to the best es is true and complete. B ty of perjury under the law
e Accept		
Electronically Submit	File by Paper	Don't Submit
Data 8, Information Specialist (2)		
CALIFORNIA FORM 700 MIR POLITICAL PRACTICES COMMENSION A PUBLIC DOCUMENT	STATEMENT OF ECONOMIC INTERESTS COVER PAGE	Date: Received Official Gary
	Figure 33: Verification Statement	



System Note

There will be an acceptance required for each form submitted. In Figure 33, for example, there is one form being submitted, so one acceptance is required.

For agencies and departments that allow electronic submission, the following options exist:

Submit Filing			
I have used of my know clicking the of the State Do Not	all reasonable diligence in prep ledge the information containe "Electronically Submit" or "File of California that the foregoing : Accept	aring this statement. I have review ed herein and in any attached sch by Paper" button, I certify under p is true and correct.	wed this statement and to the best hedules is true and complete. By penalty of perjury under the laws
- Aucept			
	a second state of the second state	and the second second	Laboration and the second

Figure 34: Filing Options (when electronic submission is available)

Electronically submit – Your form is instantly routed to your Filing Officer and archived under your "Previous Filings." You will receive a confirmation message on-screen and via email upon submission. When you submit electronically, you will receive the following confirmation message for each form that you accept and submit.

Form Submitted
Thank you.
Your Conflict of Interest Form 700 has been successfully subbmitted electronically with the Clerk of the Board.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close

Figure 35: Confirmation Message for Electronic Form

File by paper – you may print your form and mail it to your Filing Officer. Note that you must accept an additional verification that states you will need to sign and mail it.

eDisclosure	8
Are you sure you want to fi You will need to sign and m	le by Paper? ail it!
Yes	No

Figure 36: Sign by Paper Verification Statement

After accepting, you will receive a confirmation message on-screen and via email. You will also be prompted by your computer to print the document. This filing will also be archived under your



"Previous Filings;" however, the "Filed Date" will not appear until your Filing Officer receives and processes it.

Form Submitted
Thank you.
REMINDER - You must date and sign your form in blue ink and forward to the Clerk of the Board before the deadline. For specific details, please read the instructions printed with your finalized form.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close

Figure 37: Confirmation Message for Printed Form



Note that you may have positions in an expanded statement that allow electronic submission, while other positions do not. eDisclosure[™] will automatically determine which forms in the expanded statement can be sent electronically and which forms must be submitted by paper, and then file them using the determined method of submission.

Don't Submit – your form will be saved under "Pending Filings" and you will be able to resume at a later time. Make sure you file and finalize by the due date, otherwise you will be subject to late charges by your Filing Officer.

6.1.6 Submit Filing (when electronic submission <u>is not</u> available)

On the "Submit Filing" page, you must accept the verification statement to proceed. In Figure 35, the option to electronically submit <u>is not</u> available. Note that this is dependent upon your agency or department. Once you select the "Accept" radio button, all submission / filing buttons will become active.



Submit Filin	g		
I have used knowledge "Submit" b and correct	l all reasonable diligence in pre the information contained her utton, I certify under penalty	paring this statemer ein and in any attac of perjury under the	nt. I have reviewed this statement and to the best of my hed schedules is true and complete. By clicking the laws of the State of California that the foregoing is true
🔘 Do No	ot Accept		
Accept	pt		
Coordinat	File tor I	e by Paper	Don't Submit
1 0	CALIFORNIA FORM 700	STATEMENT O C	F ECONOMIC INTERESTS Date Received oncui use Only OVER PAGE
	Please type or print in ink	A Pı	ublic Document
	NAME (LAST)	(FIRST)	(MIDDLE) DAYTIME TELEPHONE NUMBER
	Johnson	Eric	William ()
	MAILING ADDRESS STREET (May use business address)	CITY	STATE ZIP CODE OPTIONAL: FAX / E-MAIL ADDRESS
	333 W. Main	Los Angeles	CA 90033:
	1. Office, Agency, or Cour Name of Office, Agency, or Court:	rt	4. Schedule Summary → Total number of pages

Figure 38: Verification Statement



There will be an acceptance required for each form submitted. In Figure 33, for example, there is one form being submitted, so one acceptance is required.

For agencies and departments that <u>do not</u> allow electronic submission, the following options exist:

Submit Filing			
I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. By clicking the "Submit" button, I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.			
O Not Accept			
Accept			
	File by Paper Don't Submit		

Figure 39: Filing Options (when electronic submission is not available)

File by paper – you may print your form and mail it to your Filing Officer. Note that you must accept an additional verification that states you will need to sign and mail it.



eDisclosure	⊗
Are you sure you want to file by Paper? You will need to sign and mail it!	
Yes No	

Figure 40: Sign by Paper Verification Statement

After accepting, you will receive a confirmation message on-screen and via email. You will also be prompted by your computer to print the document. This filing will also be archived under your "Previous Filings;" however, the "Filed Date" will not appear until your Filing Officer receives and processes your form.

Form Submitted
Thank you.
REMINDER - You must date and sign your form in blue ink and forward to the Clerk of the Board before the deadline. For specific details, please read the instructions printed with your finalized form.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close

Figure 41: Confirmation Message for Printed Form

Don't Submit – your form will be saved under "Pending Filings" and you will be able to resume at a later time. Make sure you file and finalize by the due date, otherwise you will be subject to late charges by your Filing Officer.



7 Prior Filing Actions

7.1 Your Prior Filings

As described in Section 5.3, click the "Previous Filings" menu option to view a list of prior submissions of FPPC Form 700, along with action buttons to view, print and amend a filing; and generate a "Filings Report."

r Filings								
#	Position	Agency	Туре	Year •	Due Date	Filed Date 👻	Disclosure Category	
۲	Data & Information Specialist (2)	Division of Special Education	Annual	2010	04/01/2011	10/15/2012 09:08:21 PM	Cat-03	
0	Data & Information Specialist (2)	Division of Special Education	Assuming	2009	11/07/2009		Cat-03	

Figure 42: Prior Filings and Action Buttons

7.2 Viewing Your Prior Filings

It's simple to view your previous filings through eDisclosure[™]. From the "Prior Filings" list, select the filing that you would like to view. Then, click the "View" button.

View	l.

Figure 43: View Prior Filing button

On the next page, your submitted FPPC Form 700 will appear, along with a time and date stamp confirming your filing submission.



CALIFORNIA FORM 700		Date Received Other the Univ
A PUBLIC DOCUMENT	COVER PAGE	Filed Date: 10/15/2012 09:08 PM
NAME OF FILER (LAST)	FIRST)	(MODLE)
Brown	Alicia	
1. Office, Agency, or Court		
Agency Name		
Division of Special Education		
Division, Board, Department, District, if applica	ble Your Position	
	Data & Information Special	list (2)
. If filing for multiple positions, list below or a	n an altachment	
Agency;	Pusitor:	
2. Jurisdiction of Office (Check at leas	t one bax)	
State	Judge (Statewide Junistiction)	
Multi-County	County of	
City Mama	de	

Figure 44: Sample of Submitted Form 700

7.3 Printing Your Prior Filings

To print your submitted form, just select the filing that you'd like to print and click the "Print" button.

Print	

Figure 45: Print Prior Filing button

Your computer will then prompt you to select a printer and print the document.

7.4 Amending Your Prior Filings

If you need to change a form that you have already submitted to your Filing Officer, you may do so through the "Amendment" process. Start by selecting the filing that you would like to amend from the "Prior Filings" list. Then, click the "Amend" button.

Amend	I

Figure 46: Amend Prior Filing Button

Once you click "Amend", you will arrive at your "Filing Detail View." Here, you will find the name of the position that you are amending and a list of all schedules that are recommended, based upon that position's disclosure category. If you initially filed an expanded statement that requires amending, all filings within that expanded statement will be amended.



If there is a disclosure category that you believe should be completed, but is not checked as recommended, you can check the <u>amend</u> box and that schedule will be included in your filing. For example, in Figure 47, the recommended schedules are A-1 through E; however, we only submitted A-1. Thus, we are amending the filing by adding Schedules B and D.

Positic	n	Agency	Agency Due Da		ate Disclosure Category		Period Covered	
Data & Information Specialist (2)		Division of Special Education	4/1/2011 <u>Cat-03</u>			0/08/09-12/31/		
ease	CHECK "Amend" box for Sch	edules you need to file.		_				
Help	Name	Description		Red	commended	Data Availabl	e Amend	Сору
0	Schedule A-1	Investments - Stocks, Bonds and (Interests (Ownership interest is les 10%)	Other is than		2	N		
0	Schedule A-2	Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater)			2			
0	Schedule B	Interests in Real Property				E		
0	Schedule C	Income, Loans & Business Positions	5		\mathbf{Z}			
0	Schedule D	Income - Gifts				Ш		
0	Schedule E	Income - Gifts (Travel Payments, A and Reimbursements)	dvances					

Figure 47: Adding a Schedule to a Prior Filing



Hover your mouse over a question mark icon ⁽²⁾ to view the respective Schedule's instructions.

To go to the next step, click the "Continue" button.

7.4.1 Amending Your Schedule(s)

To start amending a schedule, simply click the respective tab at the top of the page. First, take notice of the icons that appear under the "Schedule" tab(s).



Figure 48: "Schedule" Icons



lcon	Action
	Toggle between maximized view and restore down.
۹	Zoom in
۹,	Zoom out
	Add an additional sheet to the schedule
Delete a section from the selected schedule (sections are numbered from left to right).	
₽ <mark>₽</mark> ₽	Sort sections alphabetically (from A to Z)
2	Print
	Save
0	Help and instructions for the respective schedule
2	Nothing to report on this schedule (removes the selected schedule from your filing)
1	What interests must I disclose? (provides a description of the disclosure category)
3	Report an Issue
FPPC Hotline	View FPPC Contact Information
	Exit

For a schedule that you have already submitted, required fields will be shown as filled out. You may alter these fields for your amendment. Note that your amendment will appear as a separate, new filing and will not replace the original. Both filings (original and amended) are archived and will become public documents.



SCHEDU	LE B CALIFORNIA FORM 70
Interests In Re (Including Renta	al Property al Income) A M E N D M E N T
STREET ADDRESS OR PRECISE LOCATION	STREET ADDRESS OR PRECISE LOCATION
115 Maple Drive	115 1/2 Maple Drive
Los Angeles	Los Angeles
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 / / 08 \$10,001 - \$100,000 / / 08 \$10,001 - \$1,000,000 ACQUIRED DISPOSED Over \$1,000,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 / / 08 \$100,001 - \$100,000 / / 08 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 DISPOSED
NATURE OF INTEREST	NATURE OF INTEREST
Ownership/Deed of Trust	Ownership/Deed of Trust
Leasehold	Leasehold Dther
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED
S0 - \$499 5500 - \$1,000 \$1,001 - \$10,000	\$0 - \$499 \$500 - \$1,000 \$1,001 - \$10,000

Figure 49: Sample Schedule B from a Previous Filing

For a schedule that you have not previously submitted, complete the empty fields for amendment submission.

	CHEDULE D come – Gifts A M E N D M E N T
NAME OF SOURCE	► NAME OF SOURCE
ADDRESS	ADDRESS
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE (mm/dd/yy) VALUE DESCRIPTION OF	T(S) DATE (mm/dd/yy) VALUE DESCRIPTION OF GIFT(S)
// \$	
NAME OF SOURCE	NAME OF SOURCE
ADDRESS	ADDRESS

Figure 50: New Schedule D for the Amended Filing

eDisclosure™ User's Manual

Prior Filing Actions



Because you are amending a previously submitted filing, your schedule(s) appear with an "Amendment" label.

After correctly inputting your information and clicking the "Finalize Form" button, you will be prompted to lock your amended document.

eDisclosure		
Are you sure you want No further changes can	to finalize your be made.	document?
	Yes	Cancel

Figure 51: Confirmation Prompt

If you are sure that you would like to proceed, click the "Yes" button.

7.4.2 Submit Amendment (when electronic submission is available)

On the "Submit Filing" page, you must accept the verification statement to proceed. In Figure 33, the option to electronically submit is available. Note that this option is dependent upon your agency or department. Once you select the "Accept" radio button, all submission / filing buttons will become active.

Submit Filing I have used all reasonable diligence in prepar of my knowledge the information contained clicking the "Electronically Submit" or "File by of the State of California that the foregoing is	ing this statement. I have herein and in any attack Paper" button, I certify true and correct.	reviewed this statement and to the best hed schedules is true and complete. By under penalty of perjury under the laws
Do Not Accept Accept Electronically Submit	File by Paper	Don't Submit
Data & Information Specialist (2)	iCHEDULE D icome – Gifts	CALIFORNIA FORM 700 HIM POLITICAL MARTICES COMMISSION A M E N D M E N T

Figure 52: Verification Statement

For agencies and departments that allow electronic submission, the following options exist:



Submit Filing I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. By clicking the "Submit" button, I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.
© Do Not Accept
Accept
Electronically Submit File by Paper Don't Submit

Figure 53: Filing Options (when electronic submission is available)

Electronically submit – Your amendment is instantly routed to your Filing Officer and archived under your "Previous Filings." You will receive a confirmation message on-screen and via email upon submission. When you submit electronically, you will receive the following confirmation message for each form that you accept and submit.

Form Submitted
Thank you.
Your Conflict of Interest Form 700 has been successfully subbmitted electronically with the Clerk of the Board.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close

Figure 54: Confirmation Message for Electronic Form

File by paper – you may print your amendment and mail it to your Filing Officer. Note that you must accept an additional verification that states you will need to sign and mail it.

eDisclosure	\otimes
Are you sure you want to file by Paper? You will need to sign and mail it!	
Yes No	

Figure 55: Sign by Paper Verification Statement

After accepting, you will receive a confirmation message on-screen and via email. You will also be prompted by your computer to print the document. This amendment will also be archived under your "Previous Filings;" however, the "Filed Date" will not appear until your Filing Officer receives and processes your form.



Form Submitted
Thank you.
REMINDER - You must date and sign your form in blue ink and forward to the Clerk of the Board before the deadline. For specific details, please read the instructions printed with your finalized form.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close



Don't Submit – your amendment will be saved under "Pending Filings" and you will be able to resume at a later time.

7.4.3 Submit Amendment (when electronic submission <u>is not</u> available)

On the "Submit Filing" page, you must accept the verification statement to proceed. In Figure 35, the option to electronically submit <u>is not</u> available. Note that this is dependent upon your agency or department. Once you select the "Accept" radio button, all submission / filing buttons will become active.

Submit Filing				
I have used all reasonable diligence in prepa knowledge the information contained herei "Submit" button, I certify under penalty of and correct.	ring this stateme n and in any attac perjury under the	nt. I have reviewed this st ched schedules is true and e laws of the State of Calif	atement and to the best complete. By clicking the ornia that the foregoing	of my is true
Do Not Accept				
Accept				
File	y Paper	Don't Submit		
Communications Officer				
CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMESSION A M E N D M E N T Please type or print in ink.	STATEMENT ((A P	DF ECONOMIC INTERESTS COVER PAGE Public Document	Date Received official Use Only	
NAME (LAST)	(FIRST)	(MIDDLE)	DAYTIME TELEPHONE NUMBER	
Johnson MAILING ADDRESS STREET (May use business address)	Eric CITY	William STATE ZIP CODE	() OPTIONAL: FAX / E-MAIL ADDRESS	

Figure 57: Verification Statement

For agencies and departments that <u>do not</u> allow electronic submission, the following options exist:



Submit Filing	
I have used all reasonable dilige knowledge the information cor "Submit" button, I certify under and correct.	ence in preparing this statement. I have reviewed this statement and to the best of my ntained herein and in any attached schedules is true and complete. By clicking the er penalty of perjury under the laws of the State of California that the foregoing is true
O Do Not Accept	
Accept	
	File by Paper Don't Submit

Figure 58: Filing Options (when electronic submission is not available)

File by paper – you may print your amendment and mail it to your Filing Officer. Note that you must accept an additional verification that states you will need to sign and mail your form.

eDisclosure	\otimes
Are you sure you want to file by Paper? You will need to sign and mail it!	
Yes No	

Figure 59: Sign by Paper Verification Statement

After accepting, you will receive a confirmation message on-screen and via email. You will also be prompted by your computer to print the document. This amendment will also be archived under your "Previous Filings;" however, the "Filed Date" will not appear until your Filing Officer receives and processes it.

Form Submitted
Thank you.
REMINDER - You must date and sign your form in blue ink and forward to the Clerk of the Board before the deadline. For specific details, please read the instructions printed with your finalized form.
If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under 'Previous Filings'.
Close

Figure 60: Confirmation Message for Printed Form

Don't Submit – your amendment will be saved under "Pending Filings" and you will be able to resume at a later time.

7.5 Filings Report

The filings report is a comprehensive snapshot of your previous filings, including information on type of filing, filing year, due date, filed date and finalized date. Use the report to track your history of filings for all your positions or active positions only. To generate a filings report, start by clicking the "Filings Report" button on the "Previous Filings" page.





Figure 61: Filings Report button

Enter the range that you'd like to generate your report around.

Previous Filings	\otimes
Filed Date Range 🛛 🔽 From:	То:
Group by Positions	
CALCE Active Positions Only	
ОК	Cancel

Figure 62: Range Options

Here, you can select / input the following parameters:

- Show filings within a specified "Filed Date Range" or "Finalized Date Range"
 - Note that filings submitted by paper will not appear in the "Filed Date Range" report until they are received and processed by your Filing Officer.
- From Date and To Date
- Grouping by positions
- Showing active positions only

Once you have inputted your parameters, your report will be generated.



🌶 🔩 🖂 🔍 Page <u>1</u>	✓ of 1		Pdf 🗸 🖏	
Previous Filings				
Filer - Eric Johnson Finalized Date From:	8/11/2009 To:	8/18/2009		
Filing Type	Filing Year	Due Date	Filed Date	Finalized Date
	Demontant of De	1 10		
Administrative Officer,	Department of De	velopment Ser	vices, YourCountyOrCity Departments/	Agencies
Administrative Officer, Assuming	2009	09/06/2009	vices, YourCountyOrCity Departments/. 08/12/2009 06:16:54 PM	Agencies 08/12/2009 06:16:54 PM
Administrative Officer, Assuming Communications Office	2009 r, Department of I	09/06/2009 Development Ser	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department	Agencies 08/12/2009 06:16:54 PM s/Agencies
Administrative Officer, Assuming Communications Office Assuming	2009 r, Department of I 2009	09/06/2009 Development Sec 09/10/2009	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department 08/13/2009 08:36:09 PM	Agencies 08/12/2009 06:16:54 PM s/Agencies 08/13/2009 08:36:09 PM
Administrative Officer, Assuming Communications Office Assuming Amendment	2009 r, Department of I 2009 2009	09/06/2009 Development Set 09/10/2009 04/01/2010	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM	Agencies 08/12/2009 06:16:54 PM s/Agencies 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM
Administrative Officer, Assuming Communications Office Assuming Amendment Engineering and Develo	2009 r, Department of I 2009 2009 2009 popmental Services	velopment Ser 09/06/2009 Development Ser 09/10/2009 04/01/2010 Officer, Depar	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM tment of Development Services, YourCo	Agencies 08/12/2009 06:16:54 PM s/Agencies 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM ountyOrCity Departments/Agencies
Administrative Officer, Assuming Communications Office Assuming Amendment Engineering and Develo	2009 r, Department of J 2009 2009 2009 2009 2009 2009	09/06/2009 Development Ser 09/10/2009 04/01/2010 Officer, Depar 09/10/2009	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM tment of Development Services, YourCo 08/18/2009 05:58:30 PM	Agencies 08/12/2009 06:16:54 PM s/Agencies 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM ountyOrCity Departments/Agencies 08/18/2009 05:58:30 PM
Administrative Officer, Assuming Communications Office Assuming Amendment Engineering and Develo Assuming Historic Preservation C	2009 r, Department of J 2009 2009 2009 2009 2009 2009 2009 2009 2009 2009 2009	09/06/2009 Development Ser 09/10/2009 04/01/2010 Officer, Depar 09/10/2009 t of Development	vices, YourCountyOrCity Departments/ 08/12/2009 06:16:54 PM ervices, YourCountyOrCity Department 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM tment of Development Services, YourCo 08/18/2009 05:58:30 PM ent Services, YourCountyOrCity Depart	Agencies 08/12/2009 06:16:54 PM s/Agencies 08/13/2009 08:36:09 PM 08/18/2009 05:29:21 PM ountyOrCity Departments/Agencies 08/18/2009 05:58:30 PM ments/Agencies

Figure 63: Sample Report

In this example, we have generated a report that shows us finalized filings—organized by position—from 8/11/2009 to 8/18/2009. Also take notice of the icons that appear at the top of the window.

93	9-14	Page 1 v of 1 v III Pdf	v 4
		Figure 64: "Report" Icons	
	lcon	Action	
	-	Display the search window	
	4	Print the report	
	9	Print the current page	
		Export as a report and save to disk	
	E.	Export as a report and open in a new window	
	Pdf 🗸	Report format (includes PDF, XLS, RTF, MHT, text, CSV and image)	



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Exit

8 Conclusion

Thank you for using SouthTech Systems' eDisclosure[™]. We are sure that you will find eDisclosure[™] intuitive, time-saving and secure as you continue to file and submit into the future.

Should you have any questions about our system or the filing and submission process, please contact your Filing Officer, who will be more than happy to assist you.





9 Bibliography

Commission, F. P. (n.d.). *Form 700 Statement of Economic Interests*. Retrieved in 2013, from California Fair Political Practices Commission: <u>http://fppc.ca.gov/forms/700-12-13/Form700-12-13.pdf</u>

Reference Pamphlet. (Copyright 2013). Retrieved in 2013, from Fair Political Practices Commission: <u>http://www.fppc.ca.gov/forms/700-12-13/RefPamphlet12-13.pdf</u>

