Welcome

Welcome to SouthTech Systems' eDisclosure™, your electronic solution for streamlining the filing and submission of FPPC Form 700 (Statement of Economic Interests). eDisclosure™ offers you the convenience and flexibility of filing Form 700 electronically, 24/7, in the privacy of your own secured filing area.

What is Form 700?

As a government official or employee, the Political Reform Act requires you to publicly disclose your personal assets and income on Form 700. The form—filed every year, as well as when you are assuming or leaving office—is a public document that is made available to anyone who requests it.

eDisclosure™ Features

With eDisclosure™, you can

- Easily fill out or amend Form 700
- Quickly copy information from a prior year's form
- Conveniently fill out one form for multiple positions
- Automatically check your form for errors and omissions
- And securely submit the form to your Filing Officer

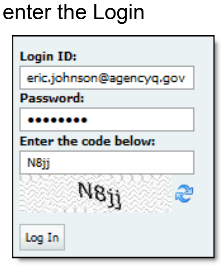
Logging into eDisclosure™

As a filer, you will be granted account access to eDisclosure™ by your Filing Officer. Once your account has been created, you will receive two automated emails.

- A "Welcome" email from your Filing Officer
- A new account notification that provides you with your eDisclosure™ Login ID and password

To log into eDisclosure™:

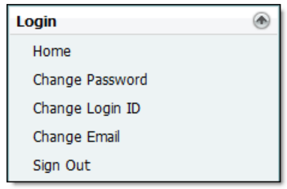
1. Make sure that you are connected to the Internet.
2. Click the system link that was included in your new account notification email.
3. In your browser window, enter the Login ID and Password from your new account notification email. Depending on your organization, you may also need to input a unique security code that appears on the login page.



4. Click "Log In."
5. If this is your first time logging in, you will need to create a new password and security question.

eDisclosure™ Login Menu

The Login Menu contains the options:

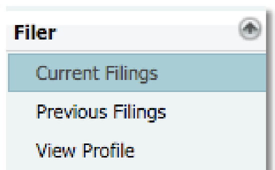


- **Change Password** – Update your account with a new password
- **Change Login ID** – Update your account with a new login ID
- **Change Email** – Update the email address where you receive system announcements and messages.

***Note**: You can collapse a menu by clicking the arrow in the right corner.*

eDisclosure™ Filer Menu

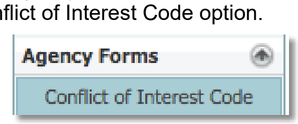
The Filer Menu contains the options:



- **Current Filing** – A list of positions that requires submission of FPPC Form 700.
- **Previous Filings** – A list of submitted FPPC Form 700 filings and actions you can take for submitted files.
- **View Profile** – Your filer profile, positions and contact address.

Agency Forms Menu

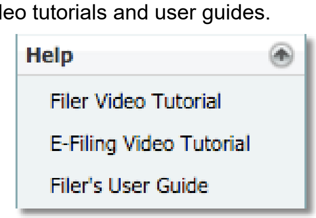
The Agency Forms Menu contains the Conflict of Interest Code option.



This option displays your agency's (or agencies') Conflict of Interest Code history. An agency's Conflict of Interest Code is reviewed and updated every two years during a Biennial Review. To view the Conflict of Interest Code for a given year, select it from the list and click "View."

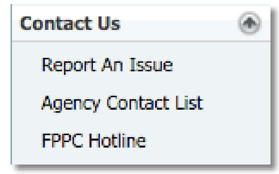
Help Menu

The Help Menu contains links to helpful video tutorials and user guides.



Contact Us Menu

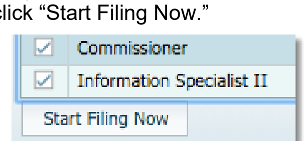
The Contact Us Menu contains the options:



- **Report an Issue** – Allows you to report any issues that you are having with eDisclosure™ to your Filing Officer and Filing Official.
- **Agency Contact List** – A list of Filing Officials / Contact Persons with phone numbers and/or email addresses for your agency or agencies.
- **FPPC Hotline** – The FPPC's contact information for reporting questions.

Initiating your Form 700 Filing

1. Navigate to "Current Filings," which displays required Form 700 positions, along with the following
   - Agency Name
   - Filing Type (Annual, Assuming, Leaving, etc.)
   - Disclosure Category/Categories (click the links for descriptions)
   - Due Date, Year and Period Covered
2. Check the position(s) that you want to file your statement for at this time and click "Start Filing Now."



   ***Note**: If you have multiple positions for the same filing year, you can file an expanded statement. eDisclosure™ will automatically select positions that can be included in the expanded statement. De-select as needed.*

3. Under "Filing Details," you will see the position(s) that you are filing for; cover page address and phone number (can be edited); and a list of all schedules that are recommended, based upon position disclosure category/categories.

   Select "Yes" to include a schedule in your filing or "No" if you have no reportable interests for a schedule.

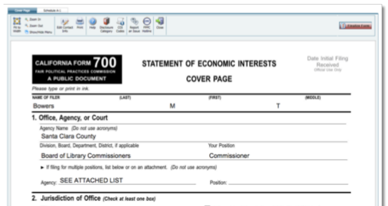
   ***Note:** Click the question mark icon to view a schedule's FPPC instructions.*

4. Click "Continue."

***Note:** Once you successfully file, you will have the option to copy information from a prior filing to a new filing when you return to the "Current Filings" page.*

Your Form 700 Cover Page

Your cover page is conveniently filled out, so all you need to do is review and verify the information displayed. If you find a mistake, please contact your Filing Official.



Review the labeled action buttons above your cover page. You can:

- Fit [Form] to Width
- Zoom In/Out
- Show/Hide Menu
- Edit Contact Info
- Print
- [View] Help
- [View] Disclosure Category
- [View] COI Codes
- Report an Issue
- [View] FPPC Hotline
- Close [Form]

Preparing Form 700 Schedule(s)

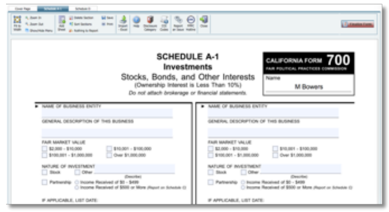
Note: *The schedules you selected on the previous page will be displayed as tabs across your screen.*

1. To complete a schedule, click the corresponding tab.

   The labeled action buttons above your schedule(s) are the same as those on your cover page, along with the following additional actions:

   - Add Sheet
   - Delete Section [from sheet]
   - Sort Sections [on sheet]
   - Nothing to Report (removes selected schedule from your filing)
   - Save
   - Import – FPPC (only for Schedule D; allows you to import schedule data from FPPC's gift-tracking app)
   - Import – Excel (only for Schedules A-1, D and E; allows you to import schedule data from an Excel template)

2. Inside a schedule, blank fields require your input. Note that if you exit the form or navigate to another page, eDisclosure™ will auto-save your modifications. You can manually save by clicking the "Save" button.



Note: *Adobe Acrobat Reader may highlight/shade the blank fields for you.*

3. If you have a prior year filing for the same position, your information will be copied into this year's form. Note that 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 wasn't in a prior filing.
4. Click the "Finalize Form" button and follow the on-screen prompts.

   Note: *If you attempt to finalize the form without entering all required information, eDisclosure™ will prompt you with a warning and list all the validation issues that it has found within the form.*

Submit your Filing

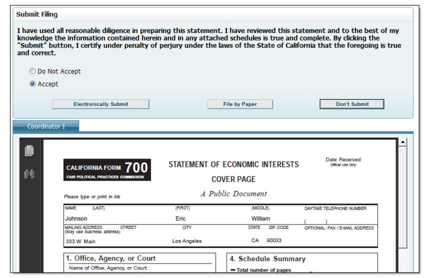
1. On the "Submit Filing" page, you must accept the verification statement to proceed. If you are filing late, you can *optionally* provide an explanation for the late filing of your form.
2. Once you select the "Accept" radio button, all submission / filing buttons will become active.
3. There will be an acceptance required for each form submitted. **Be sure to review your filing preview before submitting.** For agencies and departments that allow electronic submission, the following options exist:

a) **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.

b) **File by paper** – Print your form and mail it to your Filing Officer. Note that you must accept an additional verification that states you will sign and mail it. After accepting, you will receive a confirmation message (on-screen and via email) and will be prompted to print the document.

Note: *The filing will also be archived under your "Previous Filings;" however, the "Filed Date" will not appear until your Filing Officer receives and processes it*

c) **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.



Note: *For agencies that do not allow electronic submission, **you will not see the option to Electronically Submit and you MUST File by Paper**.*

6. You may also need to complete a survey at the end of the process.

View Previous Filings

From the "Previous Filings" list, select a filing and click the "View" button (if you filed an expanded statement, click the [+] icon to see each position included in the statment. Other options include:

- Print
- Print with Blank Signature (for signing and submitting to other Filing Officers)
- Save Locally [to your computer]
- Amend
- Filings Report

Amend Previous Filings

1. From the "Previous Filings" list, select the filing that you would like to change and click "Amend."
2. Check the schedules (and/or cover page) to amend.
3. Complete the schedules and finalize.

   Note: *Amendments appear as separate, new filings and will not replace the originals. Both filings (original and amended) are archived and public.*
4. Click the "Finalize Form" button.
5. Refer to the steps listed under **"Submit Your Filing."**