



Form 700: Electronic Filing Process

AGENDA

- Importance of filing Form 700
- eDisclosure
- Process for Filing your Electronic Form 700
- Resources
- Next Steps and Q & A



Importance of Filing and eDisclosure



Importance of Filing

- **Legal requirement from the Political Reform Act of 1974**
 - Every government agency must adopt a conflict of interest code
- **Three Components of a Code**
 - Terms of the Code
 - Disclosure Categories
 - List of Designated Positions
- **Assuming, Annual and Leaving Process**
 - Designated positions are required to file an annual Form 700
 - The annual process starts in January and the forms are **due April 1st**
 - **Penalties for late filings are \$10 per day up to \$100**
 - Assuming and Leaving Office forms must be filed within **30 days**
- **Biennial Process**
 - Required to review the county's conflict of interest code biennial on even years
 - All Directors are required to review their positions and designate who should file



eDisclosure

WHAT:

- Your web-based electronic solution for the filing and submission of FPPC Form 700

HOW:

- File your Form 700 electronically, 24/7, in the privacy of your own secured filing area

WHY:

- Easier to comply with reporting requirements
- Securely filing and submitting an FPPC Form 700 to your Filing Officer
- Easily amending prior forms
- Program is secure and password protected
- Saves you time and money
- Assists you with accurately completing your Form
- Quickly copying information from prior years' forms



Players



Code Reviewing Body

- Board of Supervisors

Filing Officer

- Clerk Recorder



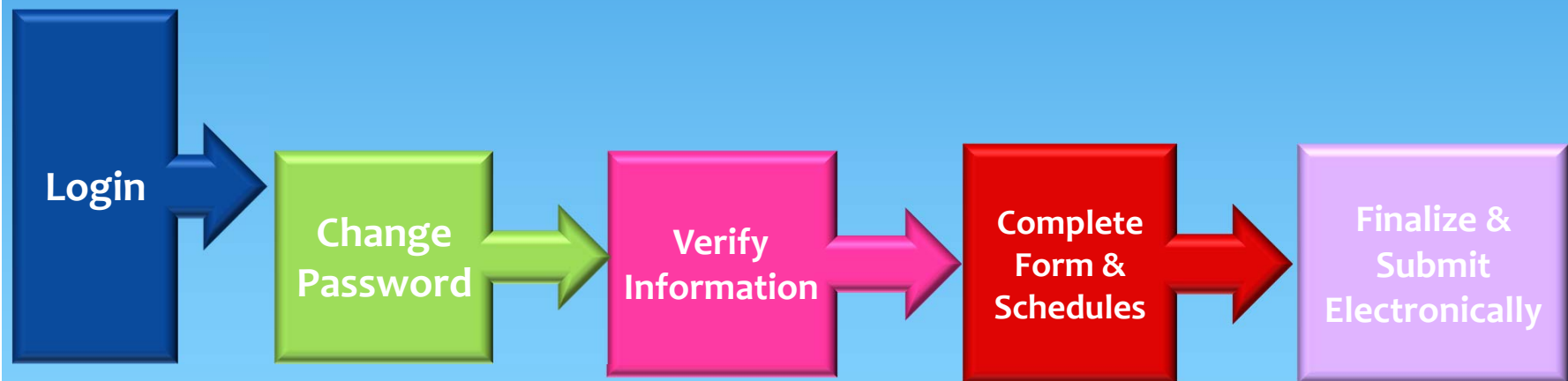
Filing Official

- Member of your HR Services Team

Filer/Employee



Steps in the Filing Process



Login

Login

You will receive two automated emails:

1. “Welcome” email from the Filing Officer



Subject: Welcome to eDisclosure



County of Sacramento
600 8th Street
Sacramento, CA 95814
(916)876-9702

Donna Allred
County Clerk/Recorder

December 22, 2014

Sugar Cookie

3701 Power Inn Road, Suite 3000
SACRAMENTO, CA 95826

Re: Electronic Filing of Statement of Economic Interests (SEI) Form 700

Dear Filer:

Login

Login

2. A new account notification that contains your username and password.

Subject: Conflict of Interest eDisclosure Account Creation Notification

Dear Sugar,

A Conflict of Interest eDisclosure account has been created for you at this time. This will allow you to complete your Form 700 online. You will be notified by separate email of any required Conflict of Interest filings. Please write this down and save for later reference.

Your Login ID is: CookieS@Saccounty.net

Your temporary Password is: w=Hq8mbi

Once you log into the system, you will need to create a new password and answer a security question.

System Logon Link: www.saccounty.net/Form700

Login

Login

Log on to **eDisclosure** with your login id (county email address) and temporary password. www.saccounty.net/Form700



Sacramento County

Login

Login ID:

Password:

Log In

[Forgot Password?](#)

[Forgot Login ID?](#)

DEPARTMENT/AGENCY

[Department/Agency
Contact List](#)

CLERK/RECORDER

Contact Person:
Dianna Richards

Telephone Number:
(916)876-9702

Email Address:
form700@saccounty.net

Welcome to eDisclosure

You can now complete and electronically submit your Form 700 Statement of Economic Interests online via eDisclosure.

If you need assistance, contact your [Filing Official](#).

If submitting by paper please print, sign and mail your completed form to:

County of Sacramento
ATTN: SEI Desk
600 8th Street
Sacramento, CA 95814

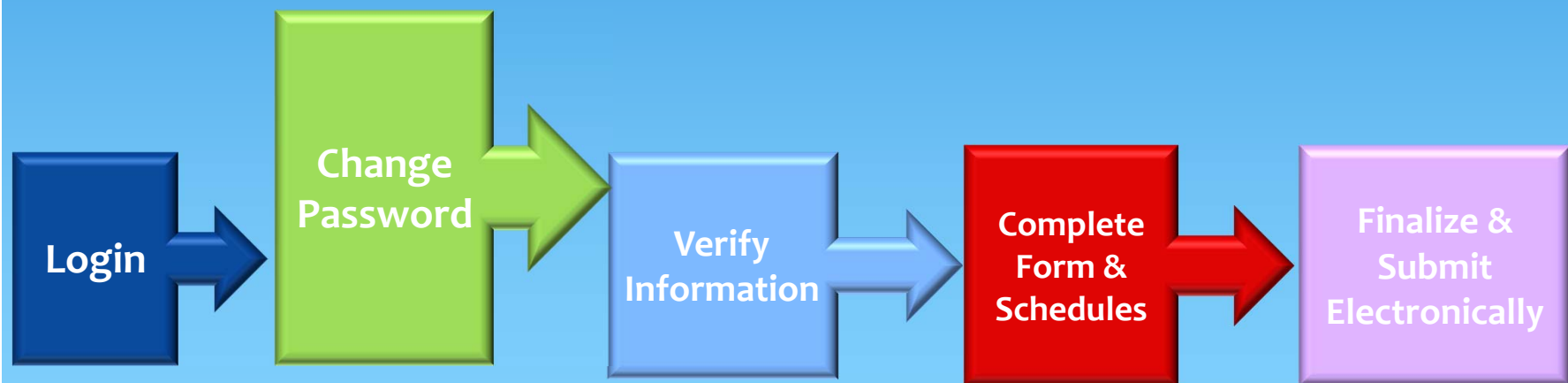
If you encounter any problems, please email us at form700@saccounty.net.

We hope that you enjoy the ease of completing your application online.

Fair Political Practices Commission Hotline

Contact the Fair Political Practices Commission Toll Free Help Line at 1-866-ASK-FPPC (1-866-275-3772) to speak with a Political Reform Consultant to receive advice and ask technical questions. [FPPC web site >>](#)

Change Password



Changing your Temporary Password

Change
Password

You will then be asked to change your temporary password.

Welcome to eDisclosure

Please create a new password. Your password must be at least:

- 8 characters
- Contain an upper and a lower case letter(s)
- Contain a digit(s)
- Contain a special character: ~ ! @ # \$ % ^ & * () - = _ +

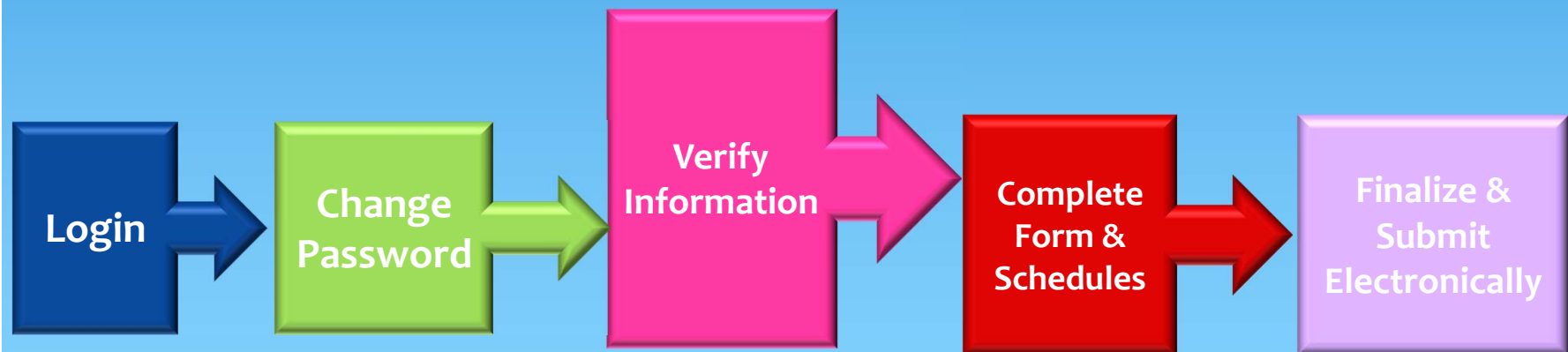
Temporary Password:	<input type="password" value="*****"/>
New Password:	<input type="password" value="*****"/>
Confirm New Password:	<input type="password" value="*****"/>

Select one of the security questions and type an answer to this question.

Security Question (Select from list):	<input type="text" value="What is your favorite color?"/>
Security Answer:	<input type="text" value="magenta"/>

Submit

Verify Information



Verifying Information

Verify Information

eDisclosure

Please review the information on each of these tabs to ensure it is correct. If you find an error in a read-only area, please select the "Report an Issue" button and report it to your Filing Official.

If no changes are needed simply select "Current Filings" under the Filer menu on the left.

Continue

You will then be asked to review the information on the [Filer](#), [Contact Information](#) and [Position](#) tabs.

Most of the information will be prepopulated for you.

Sacramento County

Welcome Cranberry Orange

Filer Contact Information Positions

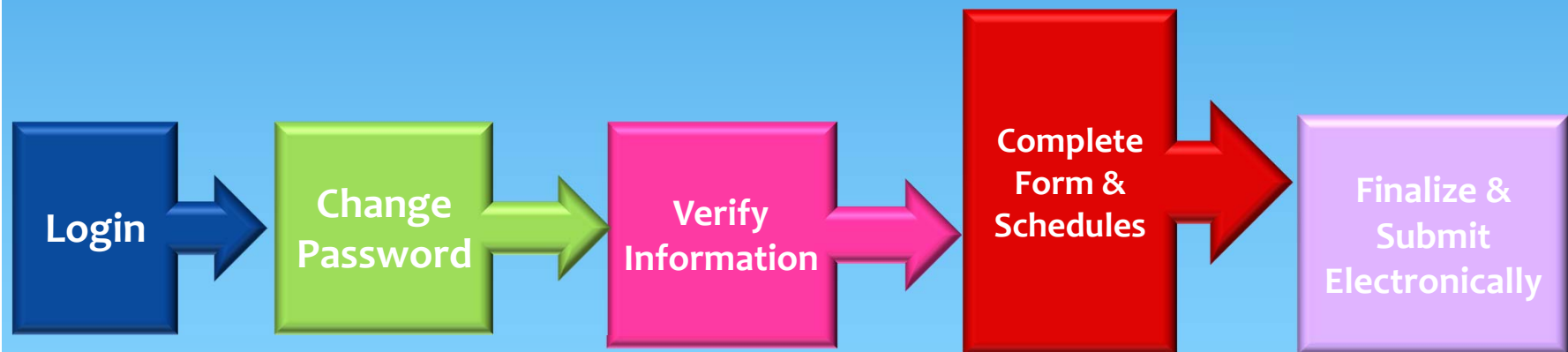
Last Name: Orange
First Name: Cranberry
Middle Name:
Work E-mail address: zolensco@sacounty.net
Personal E-mail Address:
Show Address On the Form 700: Position Address
Show Email On the Form 700: Don't Show

Edit Report An Issue

Review all three tabs and click edit to make changes!

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Complete Form & Schedules



Fill Out Form & Schedules

Complete
Form and
Schedules

Filing Form 700

To start the filing process, place a check mark next to the position(s) that you want to file your statement for at this time and click **“Start Filing Now”** button.

The screenshot shows the Sacramento County eDisclosure system interface. The header includes the Sacramento County logo and the text "Sacramento County". Below the header, there is a "Welcome Cranberry Orange" message. The main content area is titled "Positions Required to file" and contains the text: "Your position(s) in the following Department(s)/Agency(es) requires you to file the following Statement of Economic Interests:". Below this text is a table with the following columns: #, Position, Agency, Type, Year, Due Date, Disclosure Category, and Period Covered. The table contains one row with a checked checkbox in the # column, "Contract Services Officer Lv 2 - 110143" in the Position column, "GENERAL SERVICES" in the Agency column, "Assuming" in the Type column, "2014" in the Year column, "12/24/2014" in the Due Date column, "COS-01" in the Disclosure Category column, and "11/24/13-11/24/14" in the Period Covered column. Below the table is a "Start Filing Now" button, which is highlighted by a blue arrow. The left sidebar contains navigation links for Login, Filer, Contact Us, Help, and Video Tutorials. The footer contains the text "eDisclosure™ Version 3.14.0310 | Copyright 2007-2014 SouthTech Systems, Inc. All rights reserved. | About Us".

#	Position	Agency	Type	Year	Due Date	Disclosure Category	Period Covered
<input checked="" type="checkbox"/>	Contract Services Officer Lv 2 - 110143	GENERAL SERVICES	Assuming	2014	12/24/2014	COS-01	11/24/13-11/24/14

Fill Out Form & Schedules

Complete
Form and
Schedules

Selecting your Schedule(s)

- You will arrive at your “**Filing Detail View**”. Here is a list of schedules that are recommended, based upon that position’s disclosure categories.
- If you have “**reportable interest**” in that schedule select “**Yes**”. If you have “no reportable interest” on any or all of the schedules, please select “**No**” for all that apply.

Help	Name	Description	Recommended	Reportable Interests
<input checked="" type="radio"/>	Schedule A-1	Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%)	✓	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="radio"/>	Schedule A-2	Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater)	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule B	Interests in Real Property	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule C	Income, Loans & Business Positions	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule D	Income - Gifts	✓	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="radio"/>	Schedule E	Income - Gifts (Travel Payments, Advances and Reimbursements)	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No

Sacramento County
Welcome Cranberry Orange

Login
Home
Change Password
Change Login ID
Change Email
Sign Out

Filing Details

The Position(s) you are filing

Position	Agency	Due Date	Disclosure Category	Period Covered
Contract Services Officer Lv 2 - 110143	GENERAL SERVICES	12/24/2014	COS-01	11/24/13-11/24/14

Cover Page Address/Phone number
9660 Ecology Lane, SACRAMENTO, CA 95827, (916)876-6239

Schedule Summary Instructions
Review your disclosure category above to determine what financial interests you are required to report.
Schedules which correspond to the financial interests described in your disclosure category are checked under the "Recommended" column.
Please select which schedules you will use under the "Reportable Interests" column by selecting either the Yes or No radio button.

Help	Name	Description	Recommended	Reportable Interests
<input checked="" type="radio"/>	Schedule A-1	Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%)	✓	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="radio"/>	Schedule A-2	Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater)	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule B	Interests in Real Property	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule C	Income, Loans & Business Positions	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/>	Schedule D	Income - Gifts	✓	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="radio"/>	Schedule E	Income - Gifts (Travel Payments, Advances and Reimbursements)	✓	<input type="radio"/> Yes <input checked="" type="radio"/> No

Video Tutorials
E-Filing Video Tutorial
Filer Video Tutorial

back Continue

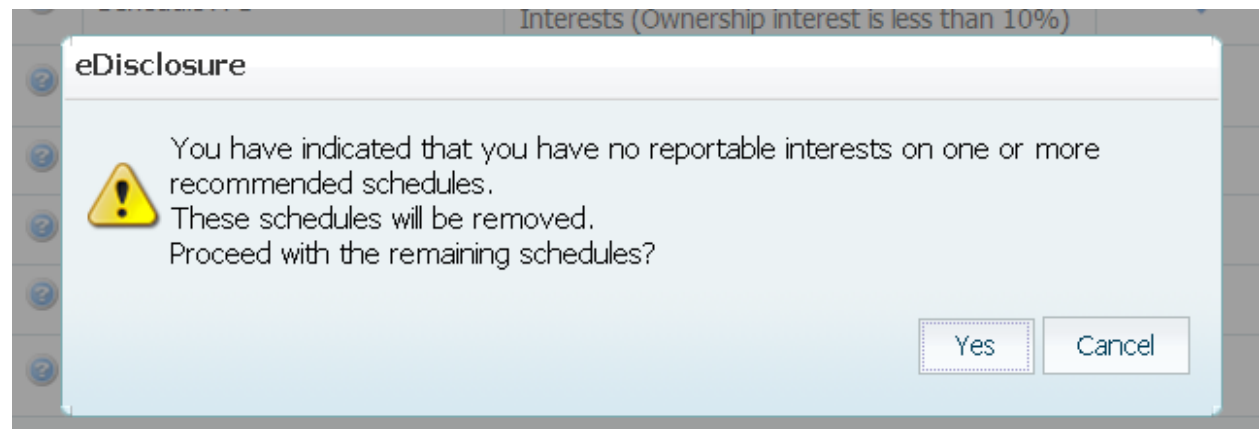
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To go to the next step, click the “**Continue**” button.

Fill Out Form & Schedules


Complete
Form and
Schedules

- A pop-up box will then display confirming that you have “no reportable interests” on some or all schedules. If it is correct click “yes”.

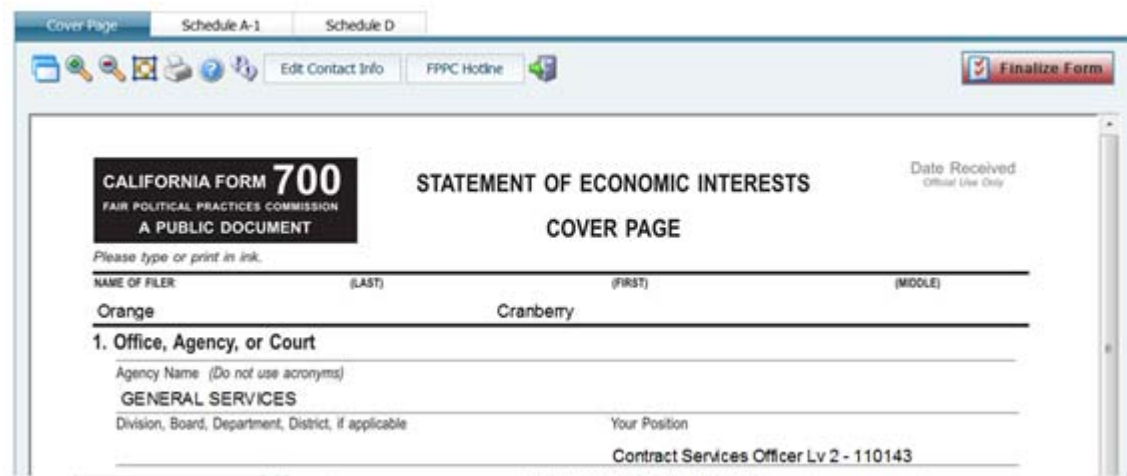


Interests (Ownership interest is less than 10%)


eDisclosure

 You have indicated that you have no reportable interests on one or more recommended schedules.
These schedules will be removed.
Proceed with the remaining schedules?

- You will then be asked to review your cover page. The information will be pre-populated for you to review.



Cover Page Schedule A-1 Schedule D



CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE

Date Received
Officer Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Orange Cranberry

1. Office, Agency, or Court

Agency Name (Do not use acronyms)
GENERAL SERVICES


Division, Board, Department, District, if applicable Your Position
Contract Services Officer Lv 2 - 110143

Fill Out Form & Schedules

Complete
Form and
Schedules

Completing your Schedule(s)



- To start filing out a schedule, simply click the respective tab at the top of the page.
- On the schedule, blank fields require your input. Should you need assistance with or have questions about the schedule, simply click the question mark icon  to view detailed reference information.

The screenshot shows the 'SCHEDULE A-1 Investments' form for 'CALIFORNIA FORM 700' from the 'FAIR POLITICAL PRACTICES COMMISSION'. The form is titled 'Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)' and includes a 'Name' field with 'Cranberry Orange' entered. The form is divided into four columns, each for a different business entity. Each column contains fields for 'NAME OF BUSINESS ENTITY', 'GENERAL DESCRIPTION OF THIS BUSINESS', 'FAIR MARKET VALUE' (with radio buttons for \$2,000 - \$10,000, \$10,001 - \$100,000, \$100,001 - \$1,000,000, and Over \$1,000,000), 'NATURE OF INVESTMENT' (with radio buttons for Stock, Other, Partnership, Income Received of \$0 - \$499, and Income Received of \$500 or More), and 'IF APPLICABLE, LIST DATE' (with 'ACQUIRED' and 'DISPOSED' sub-sections). A 'Finalize Form' button is visible in the top right corner. The footer of the page reads 'eDisclosure™ Version 3.14.0310 | Copyright 2007-2014 SouthTech Systems, Inc. All rights reserved. | About Us'.

Fill Out Form & Schedules

Complete
Form and
Schedules

Form	Section	Issue
Schedule A-1		Form Not Filled Out.
Schedule D		Form Not Filled Out.

- If you click on “**Finalize Form**” without completing the blank information you will get the following validation issues.

- When you click “**Close**”, you’ll be taken back to the schedule with the validation issues marked in red.

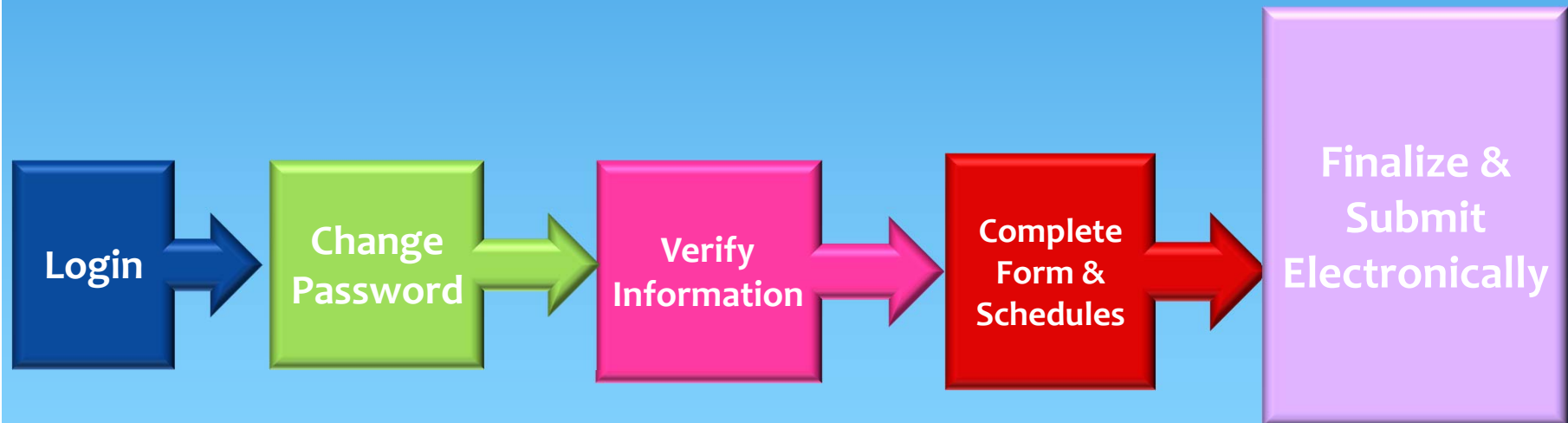
CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name: Eric Johnson

SCHEDULE B
Interests in Real Property
(Including Rental Income)

STREET ADDRESS OR PRECISE LOCATION	STREET ADDRESS OR PRECISE LOCATION
115 Maple Drive	115 1/2 Maple Drive
CITY	CITY
FAIR MARKET VALUE	FAIR MARKET VALUE
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
NATURE OF INTEREST	NATURE OF INTEREST
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED

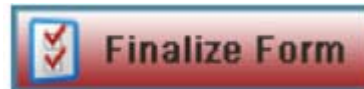
Finalize & Submit Electronically



Fill Out Form & Schedules

Finalize &
Submit
Electronically

- After you have entered all required information, you may proceed with the submission process by clicking the “**Finalize Form**” Button.



eDisclosure



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

Yes

Cancel

Submit Filing

Finalize &
Submit
Electronically

- On the “Submit Filing” page you must accept the verification statement to proceed. Once you select the “**Accept**” radio button, all submission/filing buttons will become active.

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 "Electronically Submit" or "File by Paper" 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

Data & Information Specialist (2)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE

Date Received
Official Use Only

Submit Filing

Finalize &
Submit
Electronically

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.

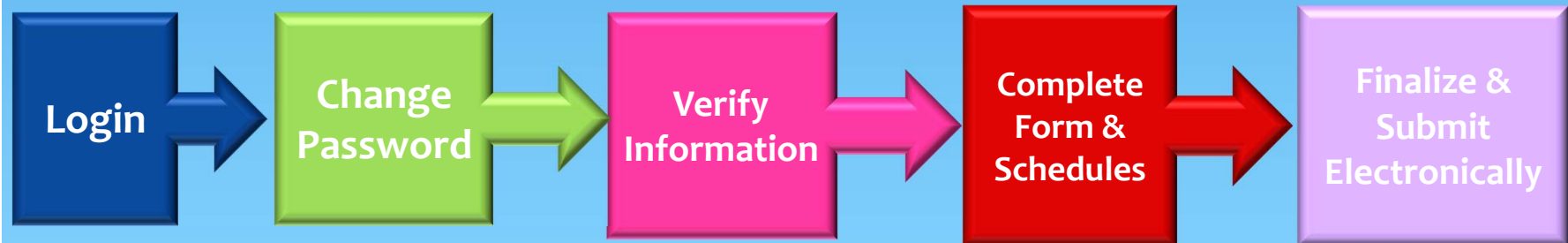
Form Submitted

Thank you.

Your Conflict of Interest Form 700 has been successfully submitted 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'.

Finished!



Prior Filings

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

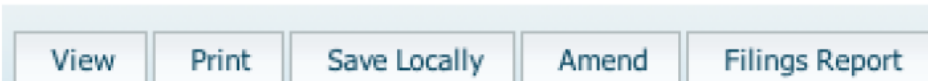
Prior Filings							
#	Position	Agency	Type	Year	Due Date	Filed Date	Disclosure Category
1	Data & Information Specialist (2)	Division of Special Education	Assuming	2009	11/07/2009		Cat-03

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.”

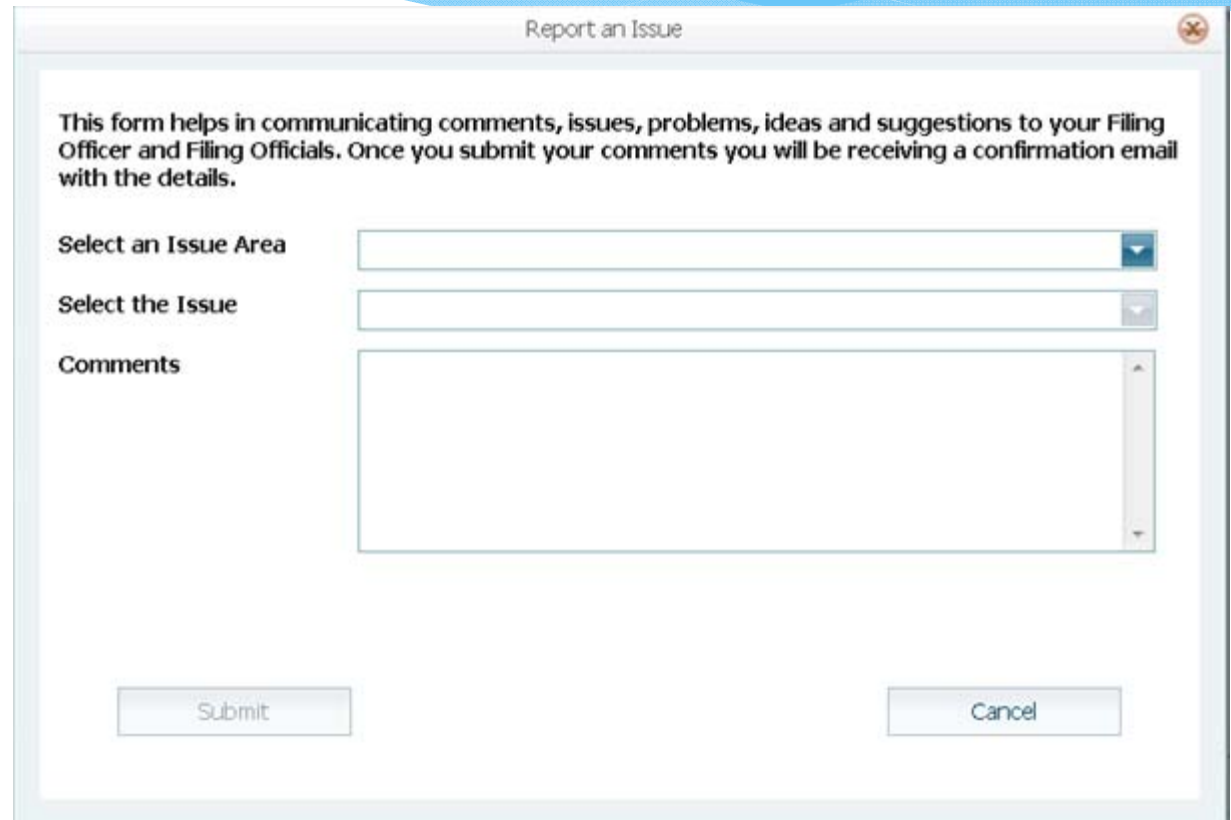
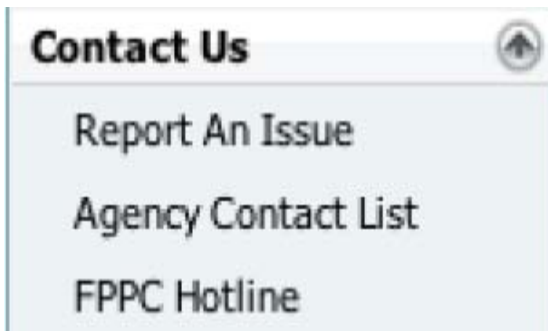


Note: You will not have any previous filings listed until you have submitted your first submission through eDisclosure.

Resources and Next Steps

Resources

- Report an Issue:
While in eDisclosure you can report an issue by clicking on Report An Issue in the “Contact Us” menu bar.

A screenshot of a web application window titled 'Report an Issue'. The window contains a form with the following elements:

- A heading: 'This form helps in communicating comments, issues, problems, ideas and suggestions to your Filing Officer and Filing Officials. Once you submit your comments you will be receiving a confirmation email with the details.'
- A dropdown menu labeled 'Select an Issue Area'.
- A dropdown menu labeled 'Select the Issue'.
- A large text area labeled 'Comments'.
- Two buttons at the bottom: 'Submit' and 'Cancel'.

- **Online Training Video**

Next Steps

- Training materials will be emailed to all filers
- You will receive two emails: one is welcoming you to the new system and the second is an email with username and login

QUESTIONS?

