

Welcome

Welcome to SouthTech Systems' eDisclosure™, your electronic solution for streamlining the management of FPPC Form 700 filers and management and review of Conflict of Interest Code amendments.

What is a Conflict of Interest (COI) Code Amendment?

The Political Reform Act requires every agency to review its Conflict of Interest (COI) code biennially and submit a report to the Filing Officer that specifies if the code must be amended or, in the alternative, that the code accurately reflects the current organization of the agency and the job duties of the various positions listed in the code. (Source: Agency Conflict-of-Interest Code Biennial Notice, Copyright 2009)

Generally, most agencies will need to amend their code to add new positions, delete old positions, or revise position titles. In addition, it is important that each agency review its disclosure categories to ensure that all of the types of financial interests that could pose a conflict of interest for an individual are disclosed. (Source: Agency Conflict-of-Interest Code Biennial Notice, Copyright 2009)

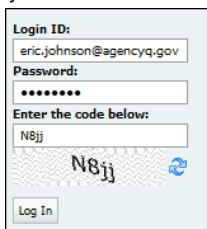
Codes are not effective until they have been approved by an agency's code reviewing body (section 87303). The code reviewing body for city agencies is the City Council. The code reviewing body for an agency wholly within a county is the county Board of Supervisors. The code reviewing body for multi-county and state agencies is the FPPC. (Source: Adopting a Conflict of Interest Code, Copyright 2009)

SouthTech Systems' eDisclosure™ facilitates the process of biennial reviews, as well as arbitrary amendments that occur throughout the life of the agency.

Logging into eDisclosure™

As a Filing Official / Contact Person, you will be granted account access to eDisclosure™ by your Filing Officer. Once your account has been created, you'll receive a new account email that provides you with your username and password. To login to eDisclosure™, follow the steps below.

1. Confirm your Internet connection.
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 "Login."



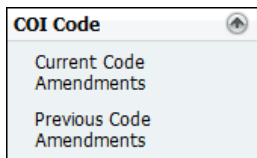
5. If this is your first time logging in, you will need to create a new password and security question.
6. After logging in, you can navigate through the system using the menu options on the left side of the page.

Note: If you are also a filer, your menu will include the filer's portion of the menu.

The "COI Code" Menu

Note: Be sure all filer information is up-to-date before starting a Code Amendment.

The "COI Code" Menu appears after you have logged into eDisclosure™ and contains the following options:



- **Current Code Amendments** – Initiate your biennial and non-biennial amendments.
- **Previous Code Amendments** – Manage and review the status of code amendments that you have already submitted.

Pre-Steps to take in a Biennial Review

Note: Every two years, your Filing officer will generate a biennial review within DisclosureDocs™ for the agencies that you manage.

1. To begin the review process, click the "Current Code Amendments" menu option.
2. Under "Agencies Required to File," you will find a list of all agencies that require a biennial review within your jurisdiction, along with the biennial review year and filing due date.
3. Select an agency from the list and click the "Start Filing Now" button.

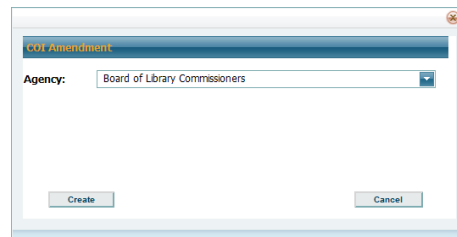


Please proceed to Creating Amendments for further instruction.

Non-Biennial Amendment

Note: From time to time, your organization may add positions, delete positions, or change categories.

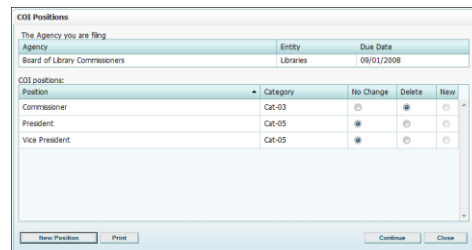
1. Select the "Current Code Amendments" menu option.
2. On the "Agencies Required to File" screen, click the "Create New Amendment" button to continue.
3. In the pop-up window that appears, select the agency from the drop-down list that requires the COI amendment and click the "Create" button.



Note: If you attempt to create a new amendment for same agency—before the amendment has been submitted and approved—you will receive an error message.

Creating Amendments

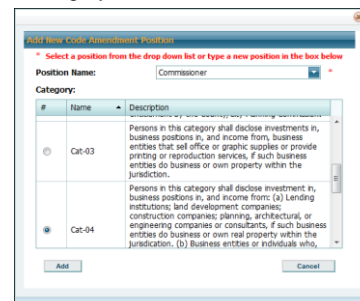
1. On the "COI Positions" page, use the radio buttons to specify an action for each COI position. These actions include:
 - No change (leaving the current COI code as-is).
 - Deleting a position (used when actually deleting a position or when changing the title of the position).
 - Add a new position to the respective agency by clicking the "New Position" button at the bottom of the page.



2. To mark a position as "no change," click the respective "No Change" radio button. To delete a position, click the respective "Delete" radio button.
3. To add a new position, click the "New Position" button.
4. In the "Add New Code Amendment Position" pop-up window, select the position name from the drop-down list (which is populated with all your agency's positions) OR type in the new position name.

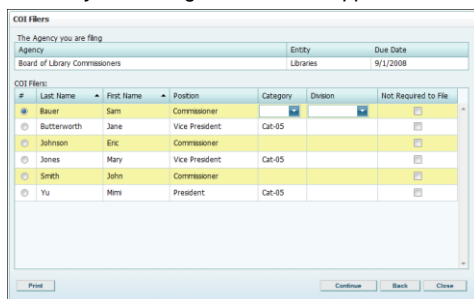
Note: You can type text directly within the drop-down box to create a new position.

5. Select the position's disclosure category.

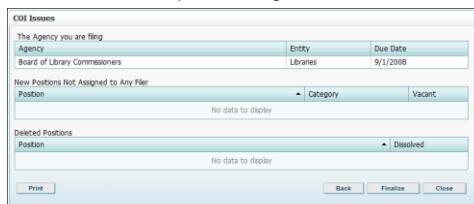


- Click the "Add" button. The new position and disclosure category will be listed on the COI positions page.
- Proceed with adding and deleting positions OR marking them as "No Change." Click the "Continue" button when finished.
- On the "COI Filers" page, assign a new position and corresponding disclosure category to the filers who have been affected by the amendment (these filers are highlighted in yellow).

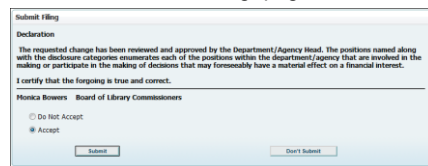
Note: If any of the filers listed are not required to file, click the corresponding "Not Required to File" checkbox. You may also assign a division, if applicable.



- Click the "Continue" button.
- If the system finds any issues with your COI amendments, they will be listed on the "COI Issues" page.
COI issues include new positions that have been created, but are not yet assigned to any of your filers; and positions that have been dissolved. If this happens, you must address the issue before proceeding.



- To finalize the amendment submission process, click the "Finalize" button.
- To submit your code amendment, you must read and agree to the declaration on the "Submit Filing" page.



- Once submitted, you will receive an on-screen confirmation that your code amendment has been sent to your Filing Officer.

Approving Amendments

There are two scenarios for approving amendments.

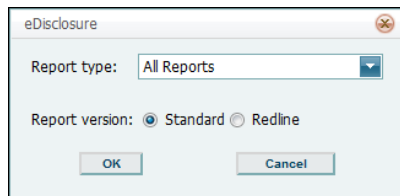
- A Filing Official is responsible for preparing the changes, printing the changes and then taking them to the approving body for review. Once approved, the Filing Official provides their Filing Officer with the approved amendment(s) and the Filing Officer accepts the changes within DisclosureDocs™.
- A Filing Officer (rather than a Filing Official) takes the changes to the approving body, obtains approval and then accepts the changes within DisclosureDocs™.

Printing Reports

The "Print" button enables you to generate multiple reports that contain information about your agency's COI positions and amendments. You will need to print reports for the approval process.

Note: The "Print" button is available through the "Current Code Amendments" menu option. You must begin creating an amendment to be able to view it.

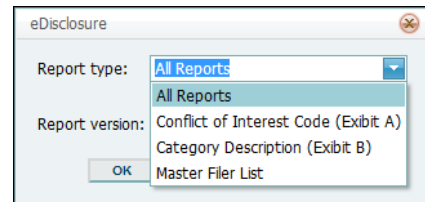
- Click the "Print" button,
- Within the prompt, select the type of report you'd like to print.



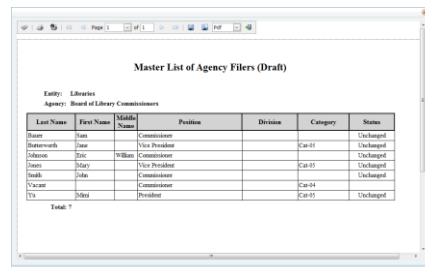
Reports include the following:

- All Reports, a multi-page report which encompasses the Conflict of Interest Code (Exhibit A), Category Description (Exhibit B) and Master Filer List reports.
- Conflict of Interest Code (Exhibit A) – Positions and their respective disclosure categories. Within a red-lined version, the position's change status will also be displayed.
- Category Description (Exhibit B) – Disclosure categories that were in COI Code Exhibit A and their respective descriptions. Within a red-lined version, the disclosure category's change status will also be displayed.
- Master Filer List – First and Last Name of filers and their associated positions and disclosure categories. Within a red-lined version, the filer's

change status will also be displayed. Note that if you delete a filer, they will appear here, but not on other reports.



- Identify whether you'd like a standard or red-lined version.
 - Standard reports display the end result of changes to positions and disclosure categories.
 - Redline reports display the actual changes that were made.
- Click "OK."
- Your report will appear in the pop-up window.



- Also take notice of the icons that appear at the top of the window.

Icon	Action
	Display the search window
	Print the report
	Print the current page
	Export as a report and save to disk
	Export as a report and open in a new window
	Report format (includes PDF, XLS, RTF, MHT, text, CSV and image)
	Exit

Checking the Status of your Amendment

- Select "Previous Code Amendments" from the COI Code menu.
- Your code amendment will be listed, along with important submission details.

Note: Remember, your amendment will not go into effect until the approving body accepts it.