Welcome

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

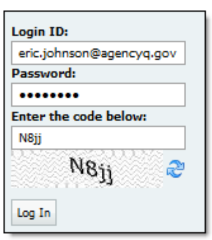
What is FPPC Form 700?

The Political Reform Act 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. 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. With eDisclosure™, filers can fill out Form 700 electronically, 24/7, in the privacy of their own secured filing area.

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.

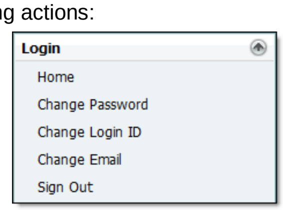
1. Confirm your Internet connection.
2. Click the system link that was included in your new account notification email.
3. In your browser window, enter the Login ID and Password from your new account notification email. Depending on your organization, you may also need to input a unique security code 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, navigate the system using the menu options on the left.



Note: *If you are also a filer, your menu will include the filer's options as well.*

The "Login" Menu

From the Login Menu, you can perform the following actions:



- Update your account with a new password
- Update your account with a new login ID
- Update the email address where you receive system announcements and messages.

The "Contact Person" Menu

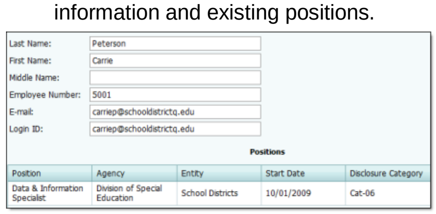
The Contact Person Menu appears after you have logged into eDisclosure™ and contains the following options:

- **Filer Management** – Conveniently manage all filers that you are responsible for from one, centralized location. You may perform a wide range of tasks, including adding a filer, initiating a transfer, resetting a password, viewing forms and more.
- **Pending Transfers** – Manage incoming and outgoing transfers to or from your organization.
- **Filer Reports** – Generate a variety of filer and form submission reports.
- **Contact Person Profile** – View your personal profile—including your agencies—and update your contact address.
- **Agency Profile** – View your agency's or agencies' profile(s) and update the associated address, division(s) and Filing Officials / Contact Person(s).

Note: *As you navigate the system, you'll find helpful tips and references listed under the Help Menu. If you find yourself stuck at any point, take a look at the help options for guidance.*

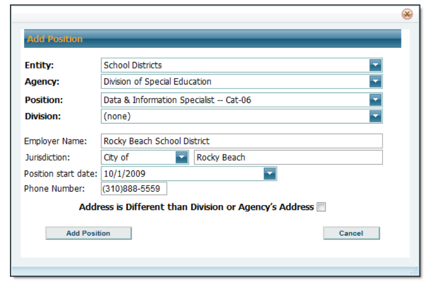
Add a New Filer

1. Select "Filer Management" from Contact Person Menu.
2. Click "Add Filer" button.
3. Enter the individual's first and last name, employee number and email address.
4. eDisclosure™ will check to see if that individual already exists in the system. If it finds a similar or exact match, you will receive a prompt. If the system locates a match, select the record from the list and click OK. Once you click OK, the form will auto-populate the rest of their information and existing positions.



5. If the filer that you are trying to add isn't in the list, click the "Not in the list" button to return to the "Add Filer" page.
6. To add / assign the filer's position, click the "Add Position" button.
7. Input the position information. It is critical that you properly input the position start date, as this date determines when the filer is required to file their assuming office Form 700.

Note: *The filer is required to file 30 days after their start date.*



8. Click "Add Position" to finish.

Add a Position to a Filer

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Filer Positions" button.
4. Add a new position by clicking the "Add Position" button.

Edit Position due to Error or Missing Information

Note: *Do use the"Edit Position" function if a filer is transferring or leaving office.*

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Edit Position" button.

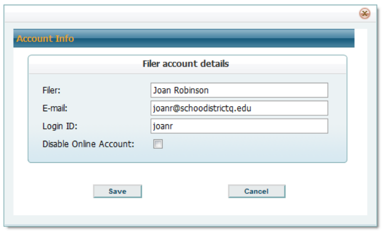
The Leave Office Function

Note: *The Leave Office function is used when the filer is transferring to a position that is not required to file OR leaving/retiring from the organization (e.g. the county, city, district, etc.). The function will create a "leaving office" statement requirement for the filer.*

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Leave Office" button.
4. In the pop-up window, verify the filer's name and select the Position End Date. *The Position End Date determines when the filer is required to file a leaving office statement, so be sure to confirm the date.*
5. Click the "Leave" button to confirm and continue.

Viewing a Filer's eDisclosure™ Account Information

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Account Info" button.



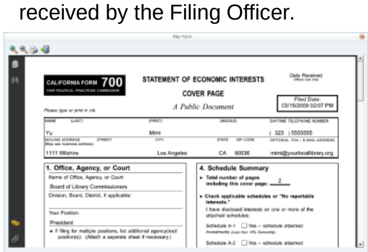
Reset a Filer's Password

Note: *From time to time, a filer may ask you to reset their password. Verify that their email address is valid before doing so, as they will receive their new, temporary password via email.*

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Reset Password" button.
4. You will be prompted to verify whether or not you want to continue with the password reset. Click "Yes" to continue.
5. The system will automatically generate, encrypt and send the filer a new password.

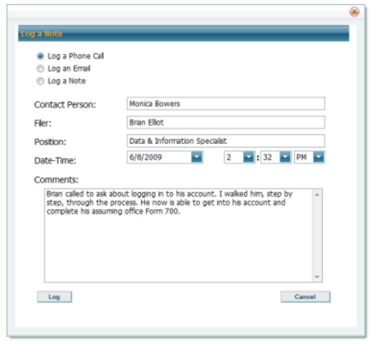
View a Filer's Submitted Form

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "View Forms" button.
4. Select the form's corresponding radio button and click "View."
5. A pop-up window will then appear, displaying the filer's Form 700. Note that you will either see an electronically submitted document or a scanned document, depending on how it was received by the Filing Officer.



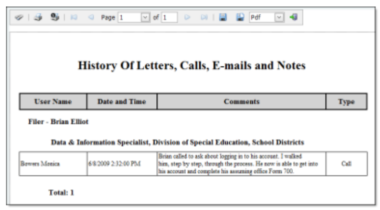
Log a Note Regarding Correspondence with a Filer

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Log a Note" button.
4. Complete the form and click "Log."



View Correspondence Report

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Correspondence" button.



Transferring a Filer

Note: *Transfers can occur within a Department, from Position-to-Position or from one Department to another. Do not use the Transfer function if the filer is leaving office (e.g. leaving County, City, District, etc. employment) or if the filer is transferring to a position that is not required to file (use the "Leave Office" Function).*

1. Select "Filer Management" from Contact Person Menu.
2. Select the filer's record from the "Filer Management" table.
3. Click "Transfer" button.
4. In the pop-up window, verify the filer's name and use the drop down lists to identify the "Transferring to" Entity, Agency, Division (if applicable) and Old Position End Date.

   If the filer's new agency is one that you manage, you will also be able to select the Filer's new position and New Position Start Date.
5. Click the "Transfer" button to confirm and continue. To view the pending transfer request, select "Pending Transfers" from Contact Person Menu.
6. If the transfer occurs within the organization that you are managing, the filer will appear in your Filer Management table with their new position. Otherwise, the filer will disappear from your Filer Management list (because you are no longer responsible for managing this filer).
7. Once the Filing Official from the other agency approves the transfer request, you will see this filer's record by clicking the "Inactive" or "Both" radio button at the top of the page.

View Pending Incoming and Outgoing Transfers

1. Select "Pending Transfers" from Contact Person Menu.
2. **Incoming transfers** represent those filers who are transferring from an organization that you do not manage into one that you do manage. You must *Accept* or *Reject* an incoming transfer by clicking the respective buttons.
   - If you accept a Transfer, you will be required to complete the "Accept Transfer" page.
   - If you reject a transfer, you will be prompted to input a reason for the rejection.
3. **Outgoing transfers** represent those filers who are transferring from an organization that you manage to one that you do not manage. To cancel an outgoing transfer request, click the "Cancel Transfer" button.
4. Once an outgoing transfer is accepted by the receiving party, the filer will disappear from your Filer Management list (because you are no longer responsible for managing this filer).

Running Reports on Filer Activity

1. Select "Filer Reports" from Contact Person Menu.
2. Select a report type from the "Report" drop-down list (please refer to your User's Guide for a list and description of all available reports).
3. Identify your report parameters:
   - Filing Year – the year that the filing is for.
   - Report Date – the "as of" date.
   - Entity (Optional) – the governing body for which you are running the report.
   - Agency (Optional) – the organization—within the selected governing body—for which you are running the report.
   - Filing Type – select from Annual, Assuming Office, Leaving Office, Amendment or All filing types.