

# eDisclosure for Filers

eDisclosures is an FPPC approved way to file your Form 700 electronically. The filers whose original Form 700s are filed with the Clerk of the Board's office can use eDisclosures.

Each filer receives an automatic email notifying them of their user login id and a temporary password when they are entered into the electronic filing system. The first time a filer logs in, a new password will need to be created and a security question selected and answered. **Passwords** must include an uppercase letter, lowercase letter, number and symbol. (Examples: Password1!, Form700!)

## Login Screen

The screenshot shows the login interface for the County of Fresno eDisclosure system. The page header includes the County of Fresno logo and the text "County Of Fresno". The main content area is titled "Welcome to eDisclosure" and contains the following text: "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](#)." Below this, the contact information for the County of Fresno is provided: "County of Fresno, ATTN: Clerk to the Board, 2281 Tulare Street, Room 301, Fresno, CA 93721-2198". A "Loading..." button is present, with an annotation indicating it "Opens email to send to Clerk's office". The page also includes a "Fair Political Practices Commission Hotline" section with contact information: "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 >>](#)".

Annotations on the screenshot:

- Login ID**: Points to the "Login ID:" input field containing the text "alex".
- Password**: Points to the "Password:" input field containing masked characters "\*\*\*\*\*".
- Provides list of all Filing Officials & their contact information**: Points to the "Department/Agency Contact List" link in the left sidebar.
- Opens email to send to Clerk's office**: Points to the "Loading..." button.

## Positions Required to File Screen

All positions that currently require an original Form 700 to be filed with the Clerk of the Board's office will be listed.

County Of Fresno

Welcome Alex Franco

**Positions Required to file**

Your position(s) in the following Department(s)/Agency(ies) requires you to file the following Statement of Economic Interests:

#	Position	Agency	Type	Year	Due Date	Disclosure Category	Period Covered
<input type="checkbox"/>	Board Member	Test	Annual	2015	4/1/2016	<a href="#">BCC: AAB</a>	01/01/15-12/31/15

[Start Filing Now](#)

If serving on multiple agencies, select all Form 700s you wish to file at same time

Select link to find details of disclosure category

Select when ready to begin filing

# Filing Details, Cover Page Address/Phone number, Schedule Summary Instructions Screen

The Form 700 is a public document. It is highly recommended to use an agency's address to appear on the cover page of the Form 700.

County Of Fresno  
Welcome Alex Franco

**Filing Details**

The Position(s) you are filing

Position	Agency	Due Date	Disclosure Category	Period Covered
Board Member	Test	4/1/2016	BCC: AAB	01/01/15-12/31/15

**Cover Page Address/Phone number**

1234 ABC Street, Fresno, CA 93721, (559)555-1234 **Edit Information**

**Schedule Summary Instructions**

To view your disclosure requirements simply click on the link above.  
Review your disclosure category above to determine what schedules you are required to report.  
Schedules which correspond to the financial interests described in your disclosure category are checked in 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
	Schedule A-1	Investments - Stocks, Bonds and Other Interests (Ownership interest is less than 10%)	<input checked="" type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No
	Schedule B	Investments, Income and Assets of Business, Entities (Ownership interest is 10% or Greater)	<input checked="" type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No
	Schedule C	Income - Gifts	<input checked="" type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No
	Schedule E	Income - Gifts (Travel Payments, Advances and Reimbursements)	<input checked="" type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No

Copy Schedule info from prior filing

#	Position	Agency	Disclosure Category	Filing Type	Filing Year	Finalized	Due Date	View
	Board Member	Test	BCC: AAB	Assuming	2015	03/31/2016	02/02/2015	

Annotations:

- All position(s) that will be covered by completing this Form 700
- This is the Agency address that will be provided on the cover page. If filing for multiple agencies, the first agency's address will be used. Filer - Do not use home address
- Don't edit, leave Agency address for your privacy
- Yes = schedule attached to complete  
No = schedule will be deleted
- All schedules required per disclosure category on COI Code(s)
- By selecting the box, past schedules will be attached to current Form 700. Schedules will need to change only if there are changes in financial interests that were reported in previous years.

# Completing a Form 700

## Cover Page

The cover page is completed by the system. If schedules have been selected on the previous screen for completion, the appropriate boxes will be checked in Section 4. An electronic signature with a date and time stamp will be assigned to the Form 700 when submitted electronically.

**Print** will have a "Draft" watermark. Print function to review information prior to submitting electronically.

**Report an issue** to the Clerk of the Board's office

Agency info for filer privacy

**4. Schedule Summary (must complete)** ▶ Total number of pages including this cover page: 3

**Schedules attached**

Schedule A-1 - Investments – schedule attached

Schedule A-2 - Investments – schedule attached

Schedule B - Real Property – schedule attached

Schedule C - Income, Loans, & Business Positions – schedule attached

Schedule D - Income – Gifts – schedule attached

Schedule E - Income – Gifts – Travel Payments – schedule attached

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE

(Business or Agency Address Recommended - Public Document)

1234 ABC Street Fresno CA 93721

DAYTIME TELEPHONE NUMBER E-MAIL ADDRESS

( 559 ) 555-1234

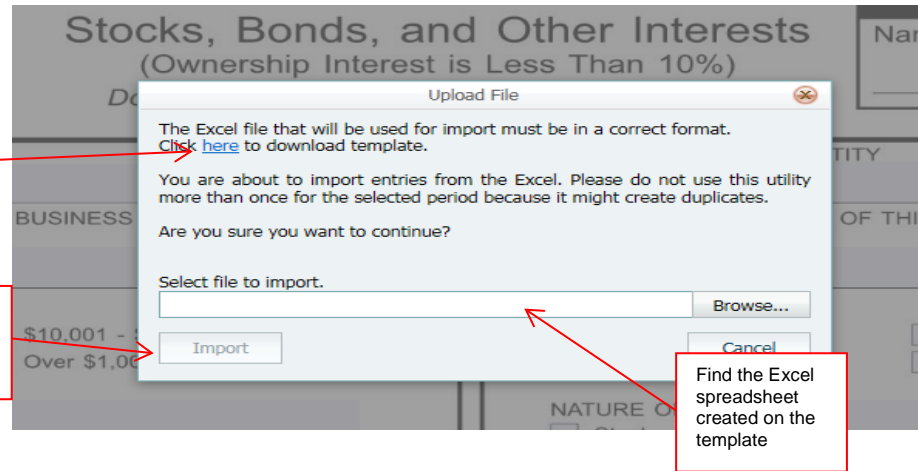
# Schedule A-I

To be completed as needed per requirements of disclosure categories if you have reportable financial interests.

The screenshot shows the software interface for California Form 700. At the top, a menu bar includes options like 'Zoom In', 'Zoom Out', 'Add Sheet', 'Delete Section', 'Sort Sections', 'Nothing to Report', 'Save', 'Print', 'Import - Excel', 'Help', 'Disclosure Category', 'Report an Issue', 'FPPC Hotline', and 'Close'. A toolbar below the menu bar contains icons for these functions. The main content area is titled 'SCHEDULE A-1 Investments' and 'Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)'. It includes a name field for 'Joe Panik' and two identical data entry forms. Each form has fields for 'NAME OF BUSINESS ENTITY', 'GENERAL DESCRIPTION OF THIS BUSINESS', 'FAIR MARKET VALUE' (with four radio button options), 'NATURE OF INVESTMENT' (with radio buttons for Stock, Other, Partnership, and Income Received), and 'IF APPLICABLE, LIST DATE' (with 'ACQUIRED' and 'DISPOSED' sub-sections). Annotations with red boxes and arrows point to various features: 'Sorts info alphabetically' points to 'Sort Sections'; 'Saves info that has been entered on schedule' points to 'Save'; 'Print to verify information, not to submit hard copy of Form 700' points to 'Print'; 'Add sheet if all sections are filled.' points to 'Add Sheet'; 'Deletes schedule if nothing to report' points to 'Nothing to Report'; 'Feature to use excel spreadsheet if many interests to report for schedule - explanation/steps provided on next page' points to 'Import - Excel'; and 'Fields that require information for Form 700 to be finalized' points to the input fields in the data entry forms.

## Importing - Excel Function (feature for Schedule A-1)

Great feature if there are many interests that need to be listed on same schedule. You must use the excel template that can be downloaded when the feature is selected. Information will be taken from the Excel spreadsheet and inserted in the schedule. When this feature is used, the following will appear:

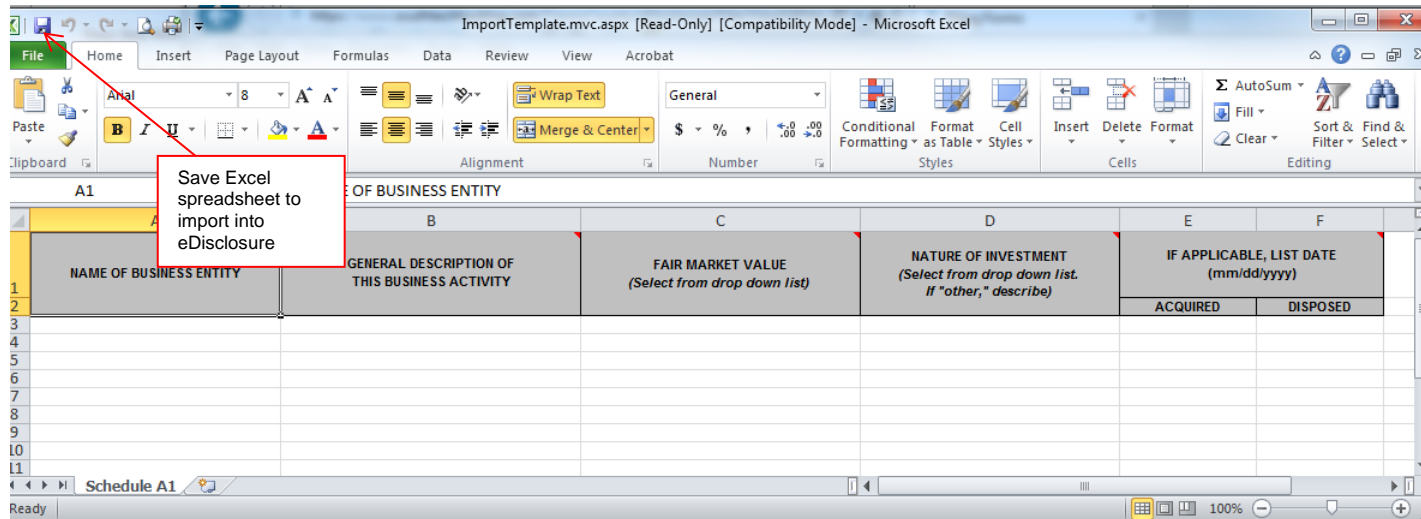


Download Excel template required to use this function

Import will import the Excel data and complete schedules as needed

Find the Excel spreadsheet created on the template

**Excel Spreadsheet Template** – each field must have information for the schedule to be completed correctly  
Save the Excel spreadsheet, as it will need to be imported into eDisclosure.



## Schedules A-2 through C

To be completed as needed per requirements of disclosure categories if you have reportable financial interests. Make sure to complete each required section on the fillable form for each schedule.

## Schedule D

To be completed as needed per requirements of disclosure categories if you have reportable financial interests.

Feature to use Excel Spreadsheet if many gifts to report for schedule – explanation/steps provided on next page

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Joe Panik

**SCHEDULE D**  
Income – Gifts

► NAME OF SOURCE (*Not an Acronym*)  
ADDRESS (*Business Address Acceptable*)  
BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

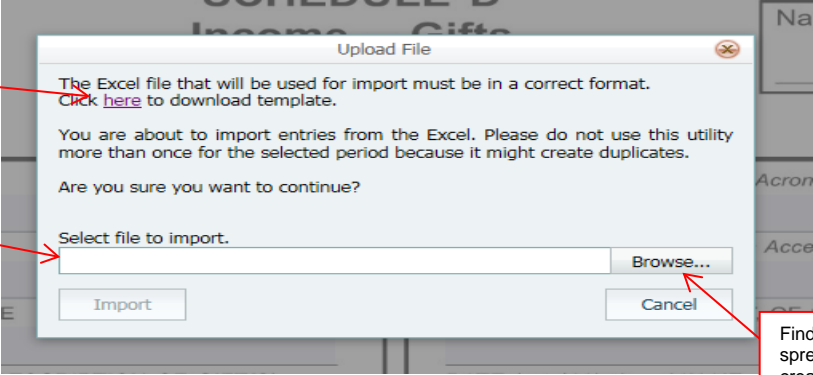
► NAME OF SOURCE (*Not an Acronym*)  
ADDRESS (*Business Address Acceptable*)  
BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

Fields that require information for Form 700 to be finalized

## Importing - Excel Function (feature for Schedule D)

Great feature if there are many gifts that need to be listed on same schedule. You must use the excel template that can be downloaded when the feature is selected. Information will be taken from the Excel spreadsheet and inserted in the schedule. When this feature is used, the following will appear:



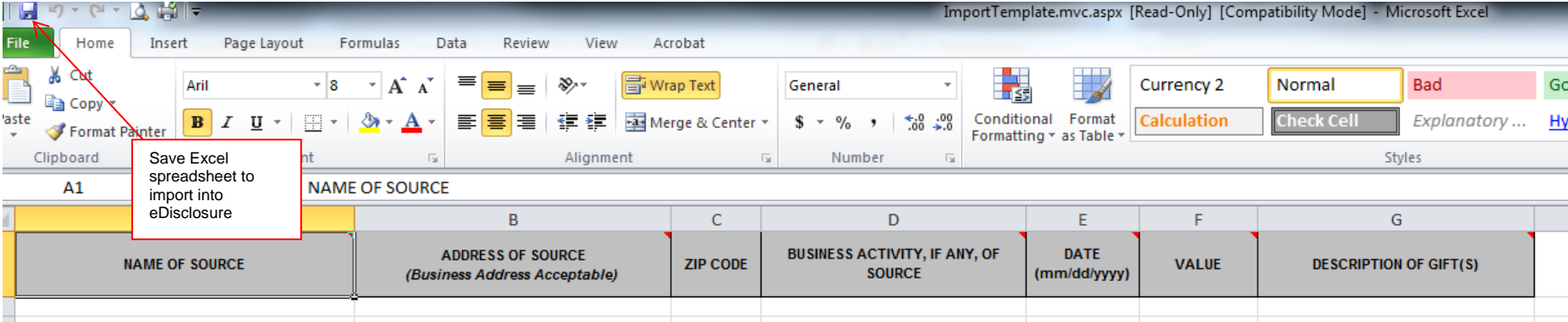
The screenshot shows a dialog box titled "Upload File" with the following text: "The Excel file that will be used for import must be in a correct format. Click [here](#) to download template." Below this, it says: "You are about to import entries from the Excel. Please do not use this utility more than once for the selected period because it might create duplicates." and "Are you sure you want to continue?". There is a text field labeled "Select file to import." with a "Browse..." button to its right. At the bottom are "Import" and "Cancel" buttons. A large blue arrow on the left points from the dialog box towards the text below.

Download Excel template required to use this function

Import will import the Excel data and complete schedules as needed

Find the Excel spreadsheet created on the template

**Excel Spreadsheet Template** – each field must have information for the schedule to be completed correctly  
Save the Excel spreadsheet, as it will need to be imported into eDisclosure.



The screenshot shows the Microsoft Excel interface with the following table structure:

A1	NAME OF SOURCE						
	B	C	D	E	F	G	
	NAME OF SOURCE	ADDRESS OF SOURCE <i>(Business Address Acceptable)</i>	ZIP CODE	BUSINESS ACTIVITY, IF ANY, OF SOURCE	DATE (mm/dd/yyyy)	VALUE	DESCRIPTION OF GIFT(S)



# Schedule E

To be completed as needed per requirements of disclosure categories if you have reportable financial interests.

The screenshot shows the software interface for California Form 700. The top navigation bar includes tabs for 'Cover Page', 'Schedule A-1', 'Schedule D', and 'Schedule E'. Below this is a toolbar with various icons: 'Fit to Width', 'Zoom In', 'Zoom Out', 'Show/Hide Menu', 'Add Sheet', 'Delete Section', 'Sort Sections', 'Nothing to Report', 'Save', 'Print', 'Import - Excel', 'Help', 'Disclosure Category', 'Report an Issue', 'FPPC Hotline', and 'Close'. A red box highlights the 'Import - Excel' button, with a red arrow pointing to a text box that reads: 'Feature to use Excel Spreadsheet if many gifts to report for schedule – explanation/steps provided on next page'. The main content area displays the title 'SCHEDULE E Income – Gifts Travel Payments, Advances, and Reimbursements' and the name 'Joe Panik'. Below the title are instructions for reporting gifts, followed by two identical form sections for entering source information, date, amount, and type of payment.

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Joe Panik

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. These payments are not subject to the \$460 gift limit, but may result in a disqualifying conflict of interest.
- For gifts of travel that occurred on or after January 1, 2016, provide the travel destination.

▶ NAME OF SOURCE (Not an Acronym)  
\_\_\_\_\_  
ADDRESS (Business Address Acceptable)  
\_\_\_\_\_  
CITY AND STATE  
\_\_\_\_\_  
 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE  
\_\_\_\_\_  
DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$\_\_\_\_\_  
(If gift)

▶ MUST CHECK ONE:  Gift -or-  Income

Made a Speech/Participated in a Panel  
 Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE (Not an Acronym)  
\_\_\_\_\_  
ADDRESS (Business Address Acceptable)  
\_\_\_\_\_  
CITY AND STATE  
\_\_\_\_\_  
 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE  
\_\_\_\_\_  
DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$\_\_\_\_\_  
(If gift)

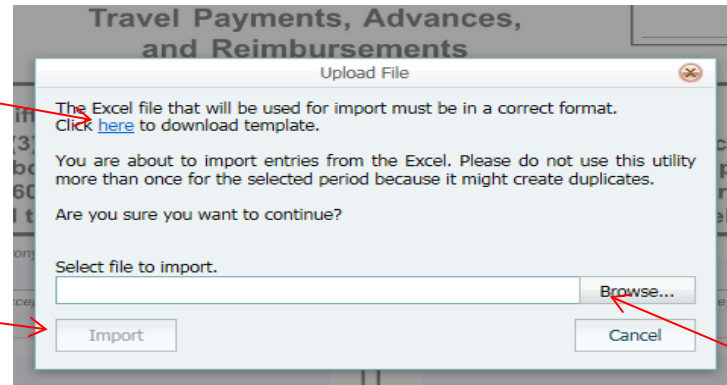
▶ MUST CHECK ONE:  Gift -or-  Income

Made a Speech/Participated in a Panel  
 Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

## Importing - Excel Function (feature for Schedule E)

Great feature if there are many gifts that need to be listed on same schedule. You must use the excel template that can be downloaded when the feature is selected. Information will be taken from the Excel spreadsheet and inserted in the schedule. When this feature is used, the following will appear:



Download Excel template required to use this function

Import will import the Excel data and complete schedules as needed

Find the Excel spreadsheet created on the template

**Excel Spreadsheet Template** – each field must have information for the schedule to be completed correctly  
Save the Excel spreadsheet, as it will need to be imported into eDisclosure.

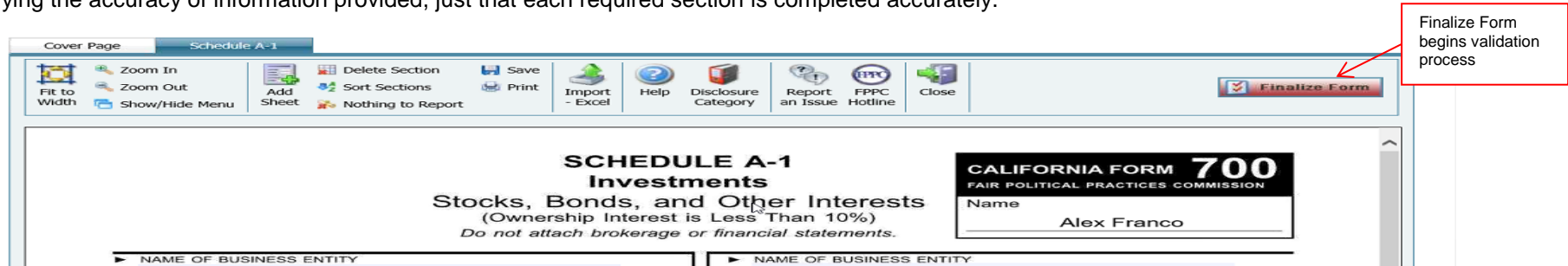
A1	B	C	D	E	F	G	H	I	J	K	L	M
NAME OF SOURCE	ADDRESS <i>(Business Address Acceptable)</i>	CITY AND STATE	501 (e)[3]	BUSINESS ACTIVITY, IF ANY, OF SOURCE	DATE(S) (If gift)		AMOUNT	TYPE OF PAYMENT (Gift or Income)	DESCRIPTION (Select from drop down list. If "other," describe)	Travel Destination (If gift)		
					(mm/dd/yyyy)	(mm/dd/yyyy)						

Save Excel spreadsheet to import into eDisclosure

## Finalize your Form 700

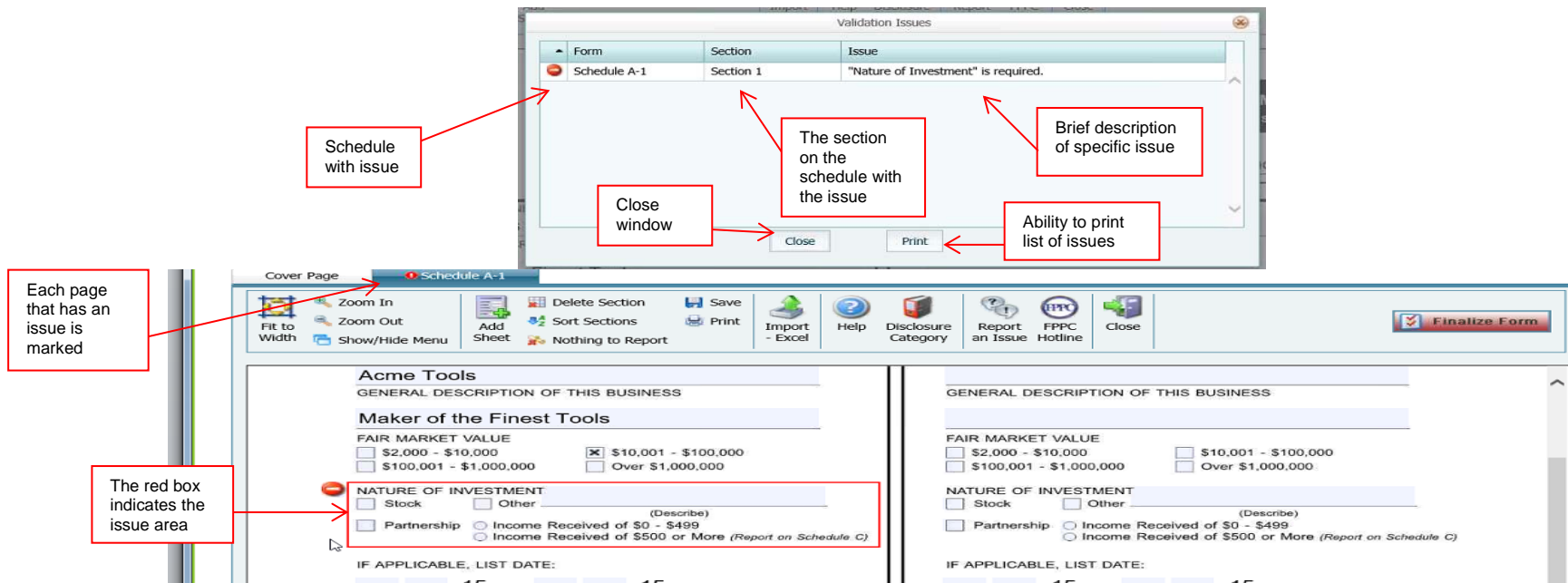
### The Validation Process

Once all schedules are completed, finalize your Form 700. The system will perform a validation process to make sure the Form is properly completed. This is not verifying the accuracy of information provided, just that each required section is completed accurately.



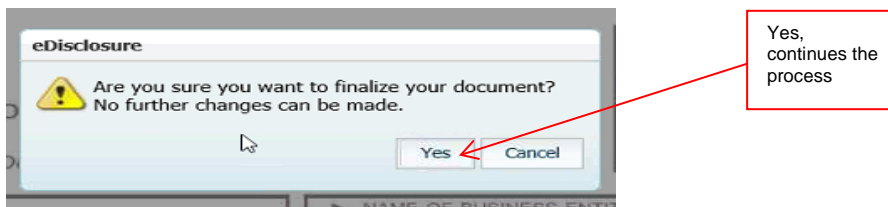
### If an Error is found in the validation process

A window will open listing Validation Issues and the issue on the schedule will be highlighted with a red box for easy identification. Make sure to correct each section. Select Finalize Form again to complete the validation process once the corrections have been made.



## Finalize Your Form 700 (cont.)

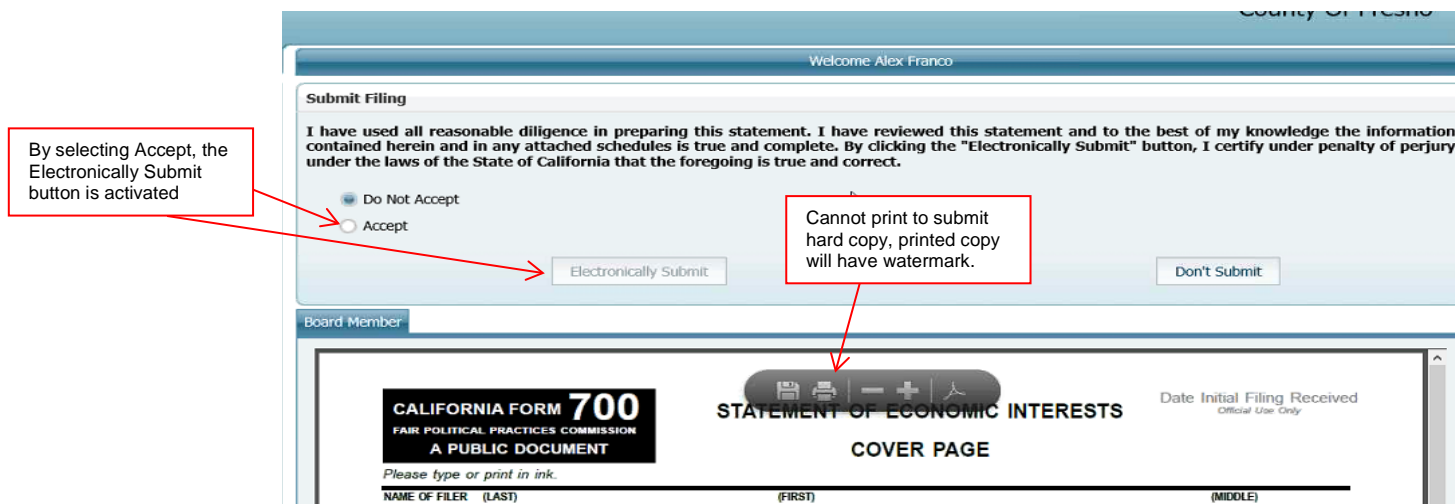
You cannot make changes to your Form 700, once it is finalized. However, you can make amendments if you find that information needs to be changed on the Form 700.



Yes, continues the process

## Statement to certify under penalty of perjury

This must be accepted to submit electronically. This takes the place of the original signature by providing an electronic signature.

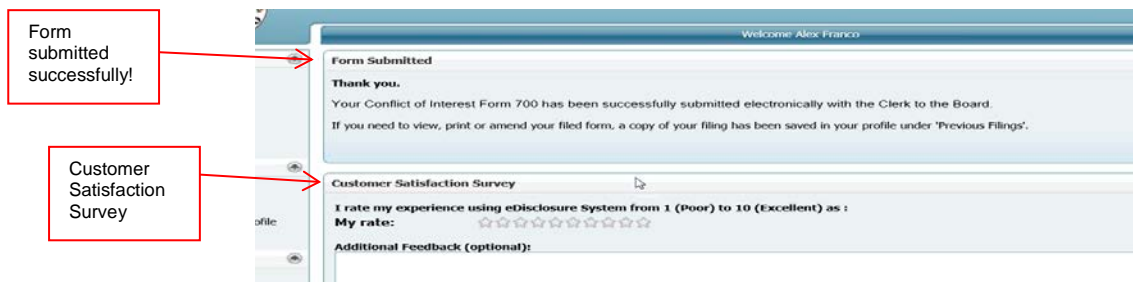


By selecting Accept, the Electronically Submit button is activated

Cannot print to submit hard copy, printed copy will have watermark.

## Form 700 Submitted Successfully

The last screen will verify the Form 700 has been successfully submitted electronically and has the option of completing the Customer Satisfaction Survey. The filer will also receive an email notification of the date and time that their Form 700 was filed electronically.



Form submitted successfully!

Customer Satisfaction Survey

## Options once Form 700 is submitted electronically

Form 700s that have been submitted electronically are available in the **Previous Filings** menu. A variety of options are available in regards to previous filings including viewing and printing.

The screenshot shows the 'Prior Filings' interface. A large blue arrow on the left points from the 'Previous Filings' menu item to the main content area. The interface includes a sidebar with navigation options and a main table of filings.

**Callouts:**

- Lists all prior filed Form 700s**: Points to the 'Prior Filings' header.
- Select the Form 700 you are interested in**: Points to the selection radio buttons in the table.
- Time/Date originally filed**: Points to the 'Filed Date' column.
- All Form 700 that currently need to be filed**: Points to the 'Filer' section in the sidebar.
- Print a copy of submitted Form 700, includes electronic signature and date/time stamp**: Points to the 'Print' button.
- Amend a submitted Form 700; amend only pages needing amendments, not entire Form 700**: Points to the 'Amend' button.
- View a submitted Form 700**: Points to the 'View' button.
- Use to submit to an original Form 700 to an agency outside Fresno County by adding original signature and agency name(s) for filing**: Points to the 'Print with Blank Signature' button.

#	Position	Agency	Type	Year	Due Date	Filed Date	Disclosure Category
<input checked="" type="radio"/>	Board Member	Test	Annual	2015	04/01/2016	03/31/2016 04:06:45 PM	BCC: AAB
<input type="radio"/>	Board Member	Test	Assuming	2015	02/02/2015	03/31/2016 03:36:53 PM	BCC: AAB

Buttons: View, Print, Print with Blank Signature, Save Locally, Amend, Filings Report