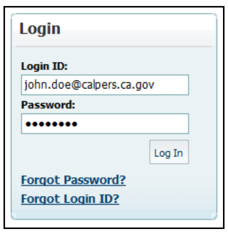
Logging into eDisclosure

1. Using your internet browser, enter or click [eDisclosure]

2. Enter your Login ID (email address) and Password. You may also need to input a unique security code if you failed to provide your correct ID/password.



Note: *For CalPERS email address, use "." instead of underscore.*

Example: john.doe@calpers.ca.gov

3. Click **Login** button.

Note: *If this is your first time logging in, you will need to create a new password and security question.*

Start your Form 700 Filing

1. Navigate to **Current Filings** tab, check the required filing(s) for your position in the "Positions Required to file" page.

Positions Required to file

Your position(s) in the following Department(s)/Agency(ies

#	Position	Agency	Type	Year
☑	Board Member	Testing Office	Annual	2012

Start Filing Now

2. Click the **Start Filing Now** button.
3. Under your "Filing Detail" view, you will find the position(s) you are currently filing for and a list of all schedules. Select **Yes** or **No** on each schedule listed.

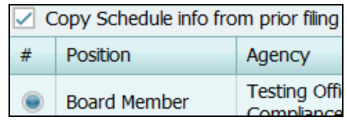
Help	Name	Description	Recommended	Reportable Interests	
	Schedule A-1	Investments - Stocks, Bonds and Other Interests (Own	✔	● Yes	○ No
	Schedule A-2	Investments, Income and Assets of Business, Entities)	✔	○ Yes	● No
	Schedule B	Interests in Real Property	✔	○ Yes	● No
	Schedule C	Income, Loans & Business Positions	✔	○ Yes	● No
	Schedule D	Income - Gifts	✔	○ Yes	● No
	Schedule E	Income - Gifts (Travel Payments, Advances and Reimbu)	✔	○ Yes	● No

- Select **Yes** if you believe schedule should be completed.
- Select **No** if you have no reportable interests in the schedule.

Note: *You may hover your mouse over a question mark icon to view FPPC instructions.*

If you previously filed using eDisclosure, you can choose to copy from a prior filing to a new filing.

a) Check the **Copy Schedule info from prior filing**.
b) Select the filing you want to copy.



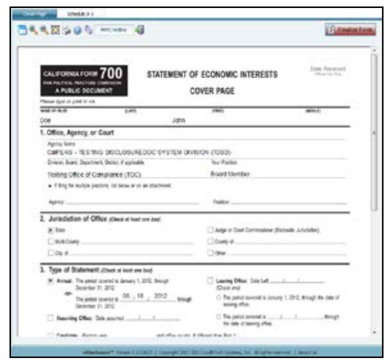
☑ Copy Schedule info from prior filing

#	Position	Agency
◉	Board Member	Testing Offi Compliance

4. Click **Continue** button.

Reviewing your Cover Page

Review and verify the information displayed in your Cover Page.



If you find a mistake, please contact ECOM by reporting an issue in eDisclosure.

To report an issue:

1. Click **Report an Issue** icon  on top.
2. Fill out *Issue Area*, *Issue*, *and Relates to Position* fields, and *Comments* box.
3. Click **Submit** button.
4. Log out of eDisclosure using the **Sign Out** on the left side bar.

Note: *Discontinue next steps until ECOM contacts you for resolution.*

Preparing your Schedule(s)

You will have multiple tabs if you're filling out more than one schedule.

1. To fill out your schedule, click the schedule tab.
2. Enter required fields.
3. If you copied schedules from a prior filing, be sure to:
   a) Delete, remove or enter the sold date for all assets that should not appear, or should be shown as sold /disposed; and
   b) Add any new information not included in a prior filing.

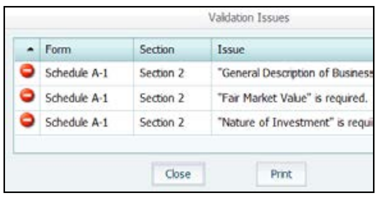
Finalizing your Filing

Finalize your filing when you have verified and entered all the required information in your form.

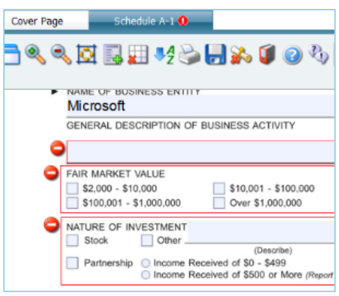
1. Click the **Finalize Form** button.

2. Click **Yes** to confirm that no further changes are needed.

   ***Note**: If you have validation issues, eDisclosure will list all the validation issues that it has found within the form. You may also receive a warning message. Be sure to review the message and take action if necessary.*



3. If you have validation issues, click **Close** button and click the schedule(s) with issue and enter required field(s) highlighted in red.



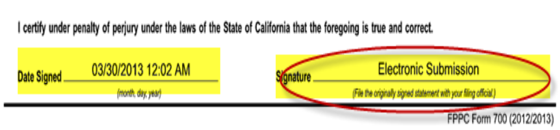
4. Re-click the **Finalize Form** button.
5. If you are sure that you would like to proceed, click the **Yes** button.

Electronically Submit your Filing

When your form is finalized, you can now electronically submit your form.

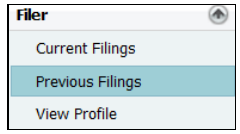
1. On the "Submit Filing" page, select the **Accept** radio button. If you are filing late, you can <u>optionally</u> provide an explanation for the late filing of your form.
2. Click **Electronically Submit** button.

   ***Note**: 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.*

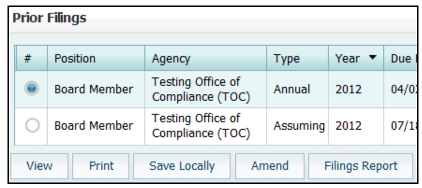


View or Print Prior Filings

1. Click **Previous Filings** tab.



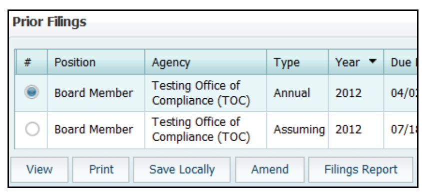
2. From the "Prior Filings" list, select a filing and click the **View** button. You can also select **Print**.



   ***Note:** On the next page, the form will appear, along with a time and date stamp confirming your filing submission.*

Amend Prior Filings

1. From the "Prior Filings" list, select the filing that you would like to amend and click the **Amend** button.



2. Select the existing schedule that you'd like to amend or the newly added schedule that you want to fill out.

   ***Note:** Your amendment will appear as a separate, new filing and will not replace the original. Both filings (original and amended) are archived and will become public.*

3. Click the **Finalize Form** button.
4. Refer to the steps listed under "Electronically Submit Your Filing" to submit.

"How To" Tutorial Video – eDisclosure

1. Using your internet browser, enter or click

[eDisclosure Tutorial Video]

CONTACT US

Enterprise Compliance (ECOM) can be reached by email at:

ECOM_TAD@calpers.ca.gov

or by calling:

(916) 795-3337 or (855) 228-4700 (toll free)