COUNTY of VENTURA
County Executive Office
Clerk of the Board of Supervisors

CLERKS FOR:
Board of Supervisors
Air Pollution Control Board
Air Pollution Control District Hearing Board
Assessment Appeals Boards
Assessment Appeals Hearing Officer
City Selection Committee
Fire Protection District Board of Appeals
Ventura County Consolidated Oversight Board

Dear **Filing Official**:

The Clerk of the Board's records indicate that you are a Filing Official for your local government agency's Conflict of Interest Code and Form 700 Filers. In preparation for the upcoming 2024 Annual filing period, it is necessary to validate the agency's list of positions and filers by **Monday, December 2, 2024,** with the Clerk of the Board's Office.

The 2024 Annual Form 700 filing deadline is **April 1, 2025**. The first notice directing designated filers to file the 2024 Annual Form 700 will be sent in January 2025, as soon as the 2024/2025 Form 700 is configured in eDisclosure.

(Reminder: If April 1 falls on a Saturday, Sunday, or legal Holiday, forms that are received in person or postmarked on the next business day shall be deemed to have been filed on time.)

Review Filing Officials' Contact Information
Firstly, please review and confirm the following contact information for your organization, or if necessary, provide updated, corrected or missing information to form700clerk@ventura.org.

Filing Official Name:

John Smith

Organization Name:

Resources and Development Management Department

Organization Address:

10293 Bloomfield Street
Los Alamitos CA USA 90720

If your agency has two or more Filing Officials, please use the following steps (screenshots are attached) to verify your agency's Contact Person list (or see the attached Quick Reference Card):

1. Log in to eDisclosure: https://cobpublic.ventura.org/eDisclosure/

2. Once you have logged in to eDisclosure, go to the menu on the left side of the screen, under the section "Contact Person", select "Agency Profile".

3. In the "Agency" drop-down, select your agency. This step is only necessary if you are the Filing Official for multiple agencies.

4. Select the "Contact Persons" tab to view the complete list of Filing Officials for your agency.

5. If necessary, provide updated, corrected or missing information to form700clerk@ventura.org.

Confirm List of Positions Report is Accurate

Secondly, please review your agency's List of Positions Report to confirm all designated positions in the Conflict of Interest Code are now available in eDisclosure. Follow the steps below (screenshots are attached) to generate the List of Positions Report (or see the attached Quick Reference Card).

1. Log in to eDisclosure: https://cobpublic.ventura.org/eDisclosure/

2. Once you have logged in to eDisclosure, go to the menu on the left side of the screen, under the section "Contact person", select "Filer Reports".

3. In the "Report" drop-down, select the "List of Positions" report located at the end of the list.

4. The default selection in the "Agency" drop-down is set to "All". This will generate a single report that includes all the agencies you manage. If you are a Filing Official for multiple agencies and prefer to generate a separate report for each agency, you can select the appropriate agency from the drop-down list.

5. Click the "Get Report" button.

6. You can print or save the report to your computer.

You can view your organization's approved Conflict of Interest Code and designated filing positions on the "Current Codes" tab at www.ventura.org/cob/coic to compare with the list of positions recorded in eDisclosure.

Review List of Filers Report for Changes

Thirdly, please review the information contained in the List of Filers Report (follow the steps provided above to generate a report, but select the "List of Filers" from the Report drop-down list) and verify the following:

- The correct email/mailing address is on record for each filer.

- If a filer has left the agency, please notify form700clerk@ventura.org with the date the official/employee left office, as well as the official/employee's forwarding address.

- If a person has assumed a designated position, or you have identified someone that should be filing with the Clerk of the Board's Office, please notify form700clerk@ventura.org with the official/employee's name, position title, start date, and email address.

Please submit all changes to the Clerk of the Board by **Monday, December 2, 2024** to form700clerk@ventura.org.

Filing Official Duties Reminder

Filing Official = You

Filing Officer = *Clerk of the Board of Supervisors

*Unless specified otherwise in your agency's Conflict of Interest Code, the Clerk of the Board of Supervisors is the Filing Officer for all Form 700 filers.

Lastly, please remember that as a Filing Official you have the following duties as outlined in Section 18115, Regulations of the Fair Political Practices Commission, Title 2, Division 6, of the California Code of Regulations:

- Forward statements to the Filing Officer no later than 5 days after the filing deadline or 5 days after receipt in the case of a statement filed late. The official shall indicate the date of the Agency's receipt on the face of the statement and shall also make and retain a copy of each (original) statement forwarded to the Filing Officer.

- Notify the Filing Officer of the following events within 10 days of:
  - Vacancy in office (i.e., retirement, resignation, or separation)
  - Any other event affecting the Conflict of Interest Code or filing obligations (such as a new hire, promotion, demotion, or transfer).

Your Filing Officer's address:

Clerk of the Board of Supervisors
800 S. Victoria Ave., L# 1920
Ventura, CA 93009

Please contact me at (805) 654-2251, or email form700clerk@ventura.org if you have any questions or require assistance in generating the List of Positions and/or List of Filers reports in eDisclosure.

Sincerely,

Jesse Nephew
Deputy Clerk of the Board of Supervisors
Ethics | Compliance

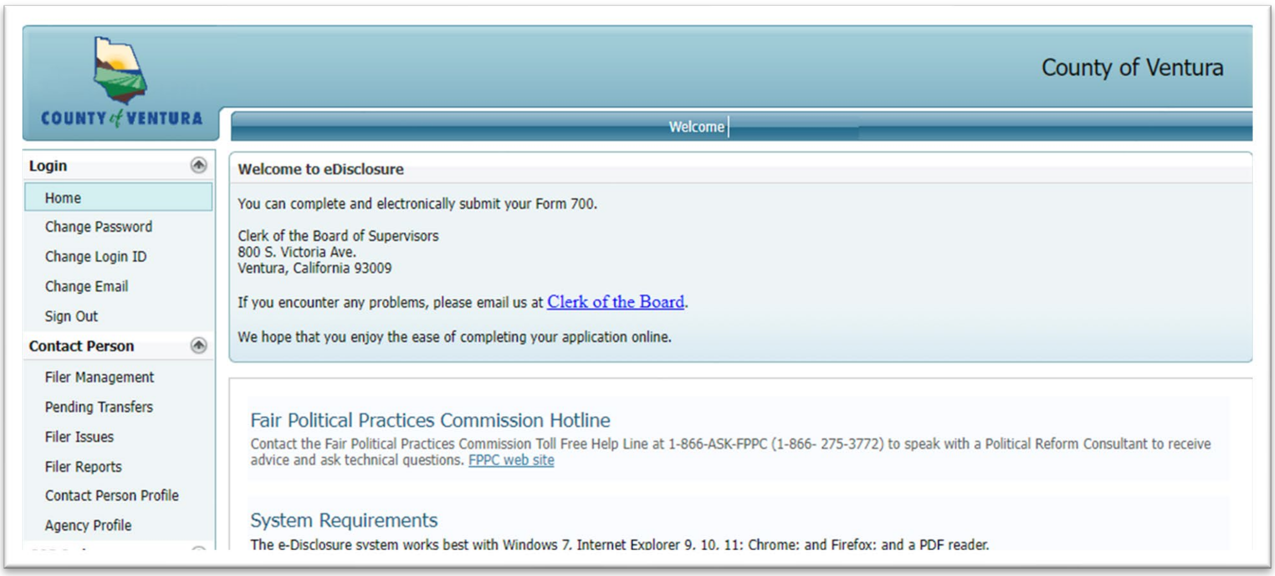
Attachments: (1) Annual Review of Form 700 Filers Screenshots, (2) eDisclosure Quick Reference Card

Annual Review of Form 700 Filers Screenshots

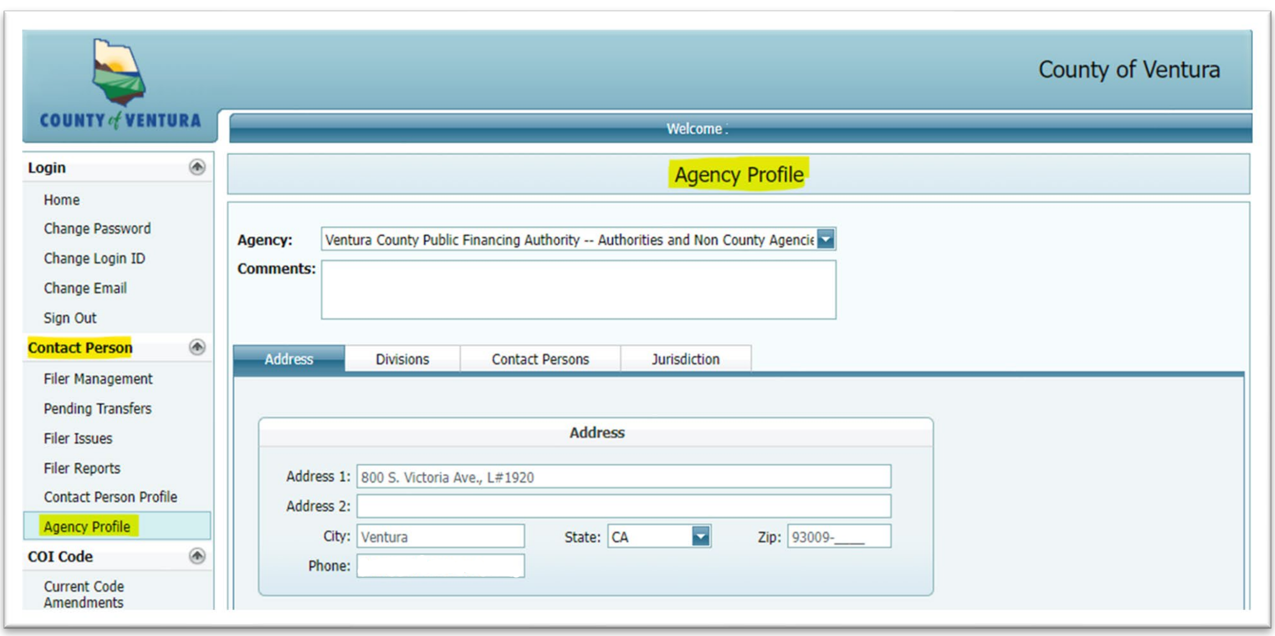
Review Filing Officials' Contact Information

If your agency has two or more Filing Officials, please use the following steps (screenshots are attached) to verify the Contact Person list (or see the attached Quick Reference Card):

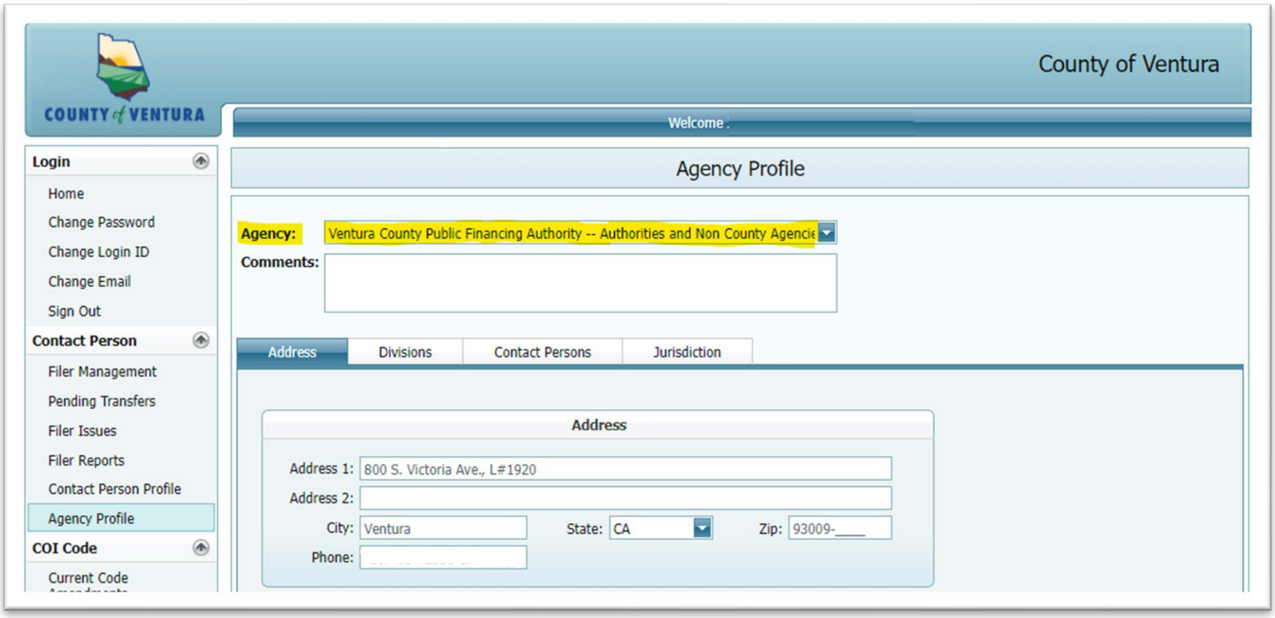
(1) Log in to eDisclosure → https://cobpublic.ventura.org/eDisclosure/



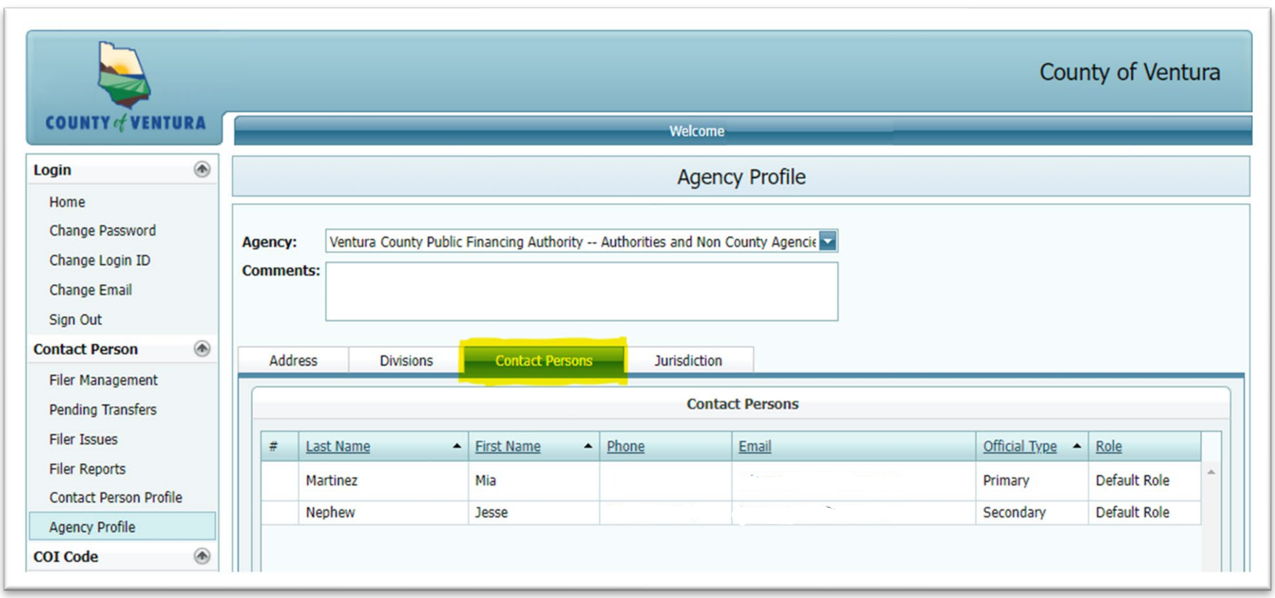
(2) Once you have logged in to eDisclosure, go to the menu on the left side of the screen, under the section "Contact Person", select "Agency Profile".



(3) In the “Agency” drop-down, select your agency. This step is only necessary if you are the Filing Official for multiple agencies.



(4) Select the "Contact Persons" tab to view the complete list of Filing Officials for your agency.



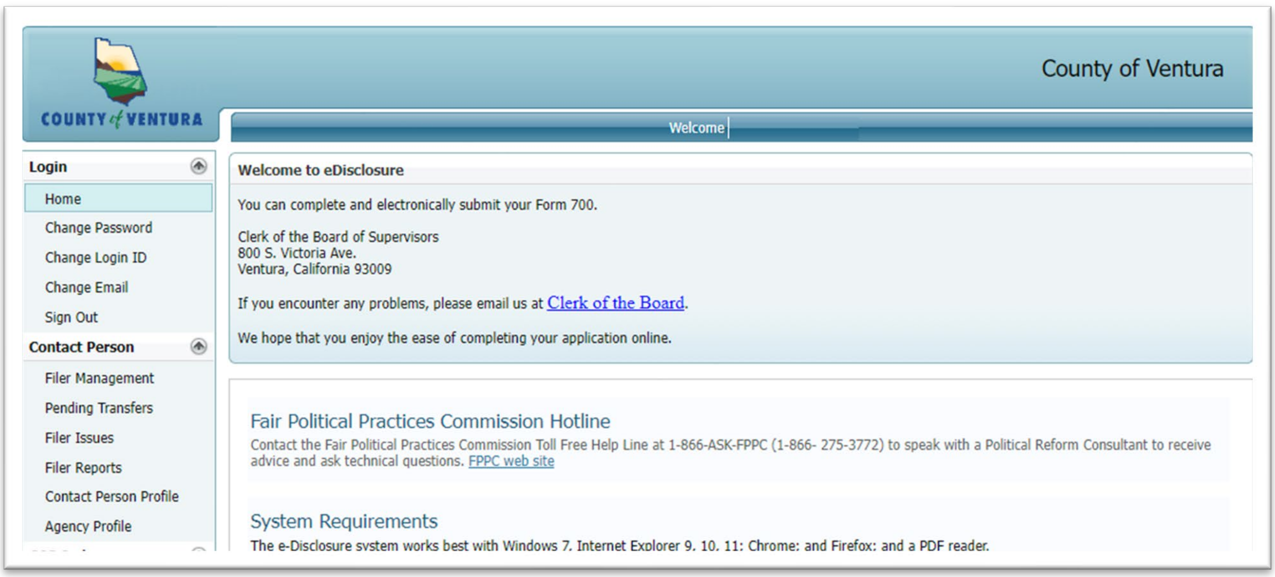
(5) If necessary, provide updated, corrected or missing information to form700clerk@ventura.org.

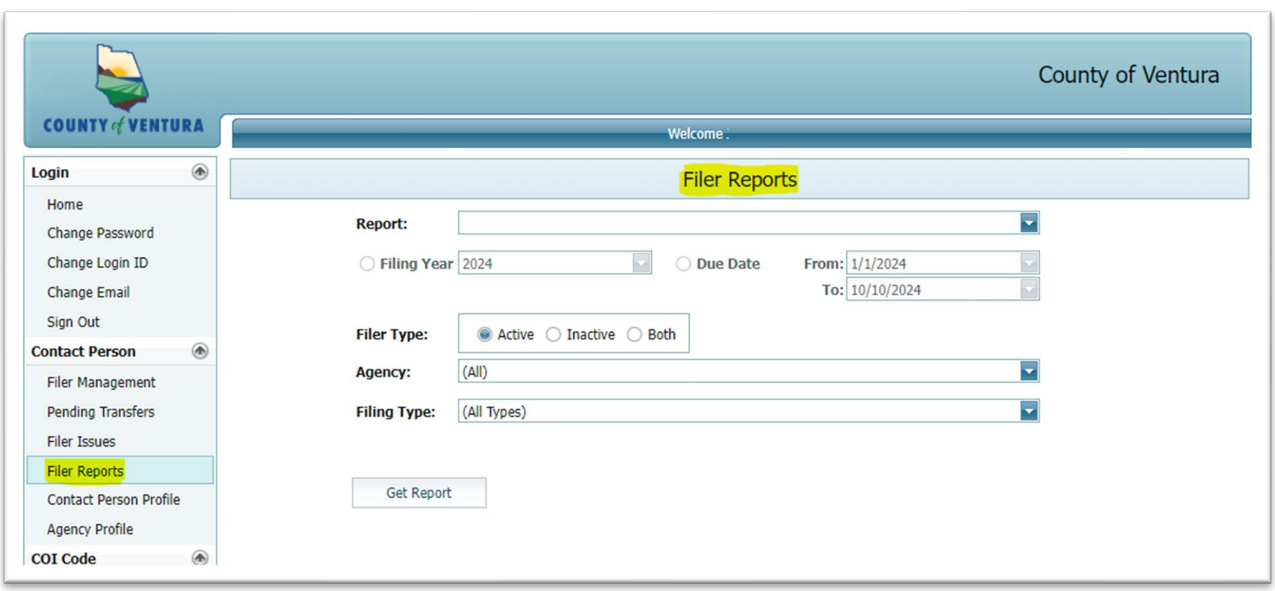
Confirm List of Positions Report is Accurate

Secondly, please review your agency's List of Positions Report to confirm all designated positions in the Conflict of Interest Code are now available in eDisclosure. Follow the steps below to generate the List of Positions Report.

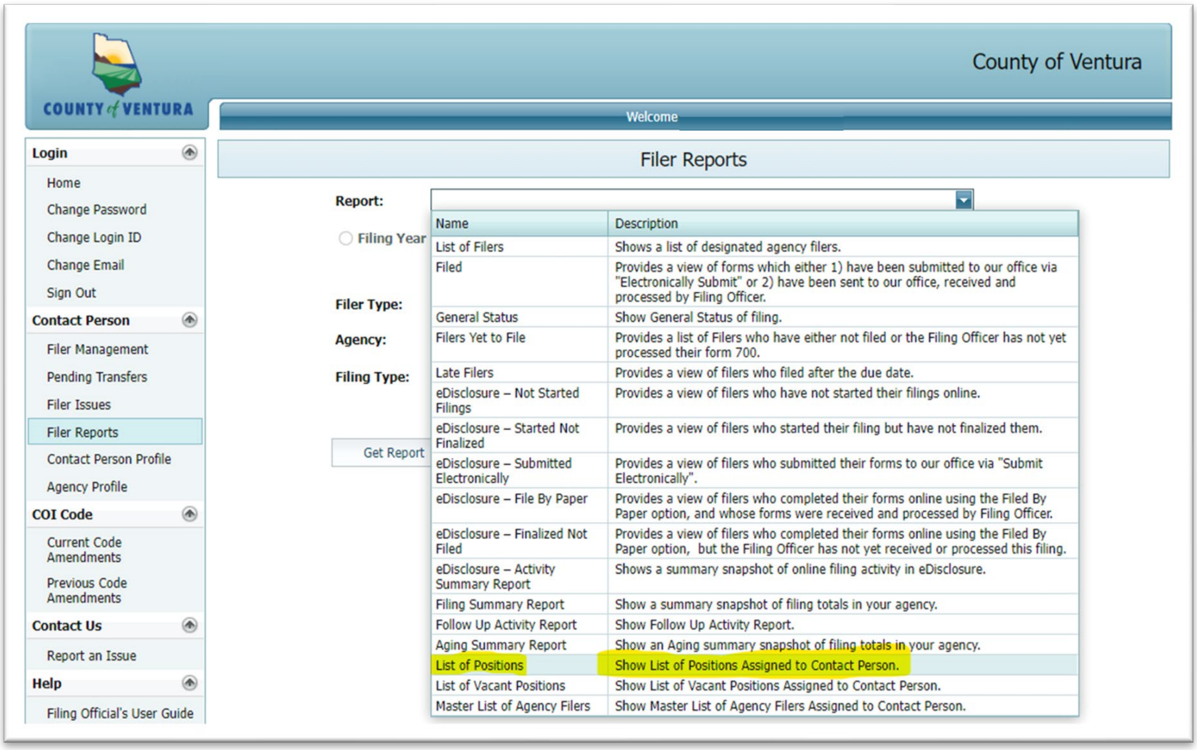
(1) Log in to eDisclosure → https://cobpublic.ventura.org/eDisclosure/

(2) Once you have logged in to eDisclosure, go to the menu on the left side of the screen, under the section "Contact Person", select "Filer Reports".

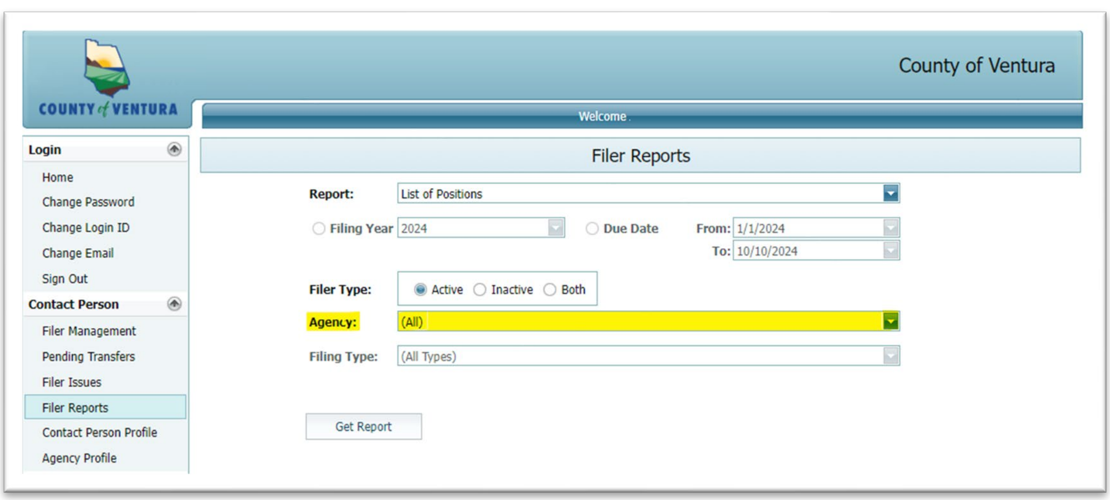




(3) In the “Report” dropdown, select the “List of Positions” report, which is located at the end of the list.



(4) The default selection in the “Agency” dropdown is set to “All”. This will generate a single report that includes all the agencies you manage. If you are a Filing Official for multiple agencies and prefer to generate a separate report for each agency, you can select the appropriate agency from the drop-down list.



(5) Click the “Get Report” button.

(6) You can print or save the report to your computer.

You can view your organization's approved Conflict of Interest Code and designated filing positions on the "Current Codes" tab at www.ventura.org/cob/coic to compare with the list of positions in eDisclosure.

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.

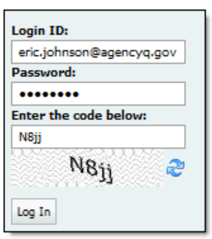
What is FPPC Form 700?

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.

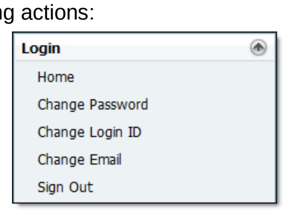
1. Confirm your Internet connection.
2. Click the system link that was included in your new account notification email.
3. In your browser window, enter the Login ID and Password from your new account notification email. Depending on your organization, you may also need to input a unique security code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

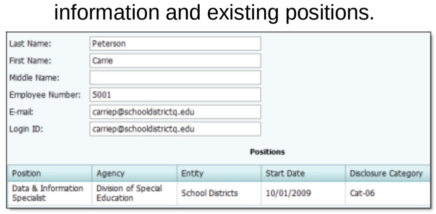
The Contact Person Menu appears after you have logged into eDisclosure™ and contains the following options:

- **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.*

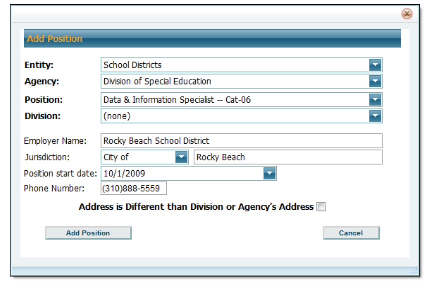
Add a New Filer

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.

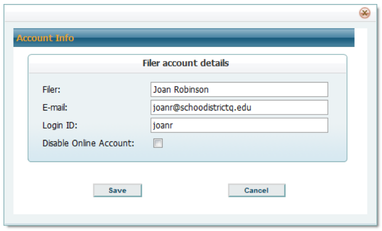
The Leave Office Function

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.



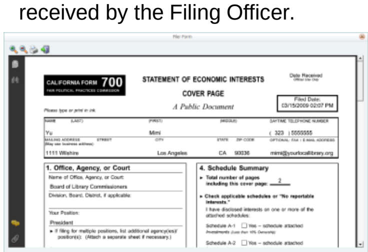
Reset a Filer's Password

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.

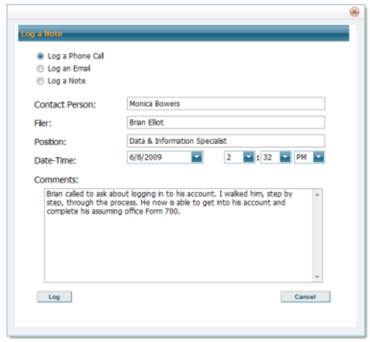
View a Filer's Submitted Form

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.



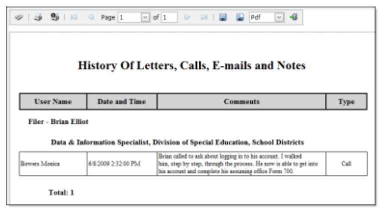
Log a Note Regarding Correspondence with a Filer

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.