

Conflict of Interest Disclosure System

Individual User Guide

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If you have any questions regarding this tutorial or the disclosure process, please contact:

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Conflict of Interest Disclosure System

Annual Conflict of Interest Notification Schedule and Deadline

- **By November 30th** of each year, the Office of the Secretary of the Commonwealth will email the official memorandum alerting agency directors and coordinators to proceed with notifying their designated employees and board and commission appointees of the obligation to disclose their financial interests for the previous 12 months.
- The deadline to submit the annual Statement of Economic Interests form or Financial Disclosure form for the current calendar year is on or before **January 15** of the next year.
- Designated state employees, judges and members of the State Corporation Commission, Virginia Workers' Compensation Commission, Commonwealth Transportation Board, the Board of Trustees of the Virginia Retirement System and members of the State Lottery Board complete the Statement of Economic Interests. Citizen members of boards and commissions in the executive branch of state government complete the Financial Disclosure form.
- The filing period for submitting the annual Statement of Economic Interests form or Financial Disclosure form is **December 1st - January 15th**. The annual filing must be submitted on or before January 15th.

Conflict of Interest Disclosure System

Accessing the Conflict of Interest Disclosure System

- Individual access to the online Conflict of Interest Disclosure System will be granted to users via their agency coordinator.
- Coordinator access to the online Conflict of Interest Disclosure System will be granted by the Conflict of Interest Director.
- For security purposes, access to the online system is restricted to designated state employees and board and commissions appointees and is therefore not accessible to the public at large.

Accessing the Conflict of Interest Disclosure System

- Registered as well as new users will receive the notification email from the Conflict of Interest system informing them of their responsibility to file a disclosure form.
- Registered users may click on the hyperlink in the notification email to access the log-in screen.
- New users will receive a second email with a link and pin number to register their account with their email address

Email Notification

Users will receive this email once annually from the COI system at the direction of the agency coordinator.

It's time to file your 2012 Conflict of Interest Disclosure CRM:0007697 inbox x  

 **Conflict of Interest Portal** ConflictofInterest@governor.virginia.gov 9:39 AM (5 hours ago) ☆  

to me ▾

Pursuant to §2.2-3 114 of the Code of Virginia and Executive Order 16 (2010), your position as a state employee, judge, or board/commission member requires you to annually disclose your financial interests as a condition of assuming office or employment and annually thereafter on or before January 15.

State employees, judges, and board members of the Virginia Retirement System; Virginia Lottery Board; and Commonwealth Transportation Board shall complete the Statement of Economic Interests form. All other board/commission members for the policy, supervisory, and advisory boards, commissions and councils shall complete the Financial Disclosure form. **The deadline to file is January 15.**

To submit your disclosure statement online please navigate to the link below.

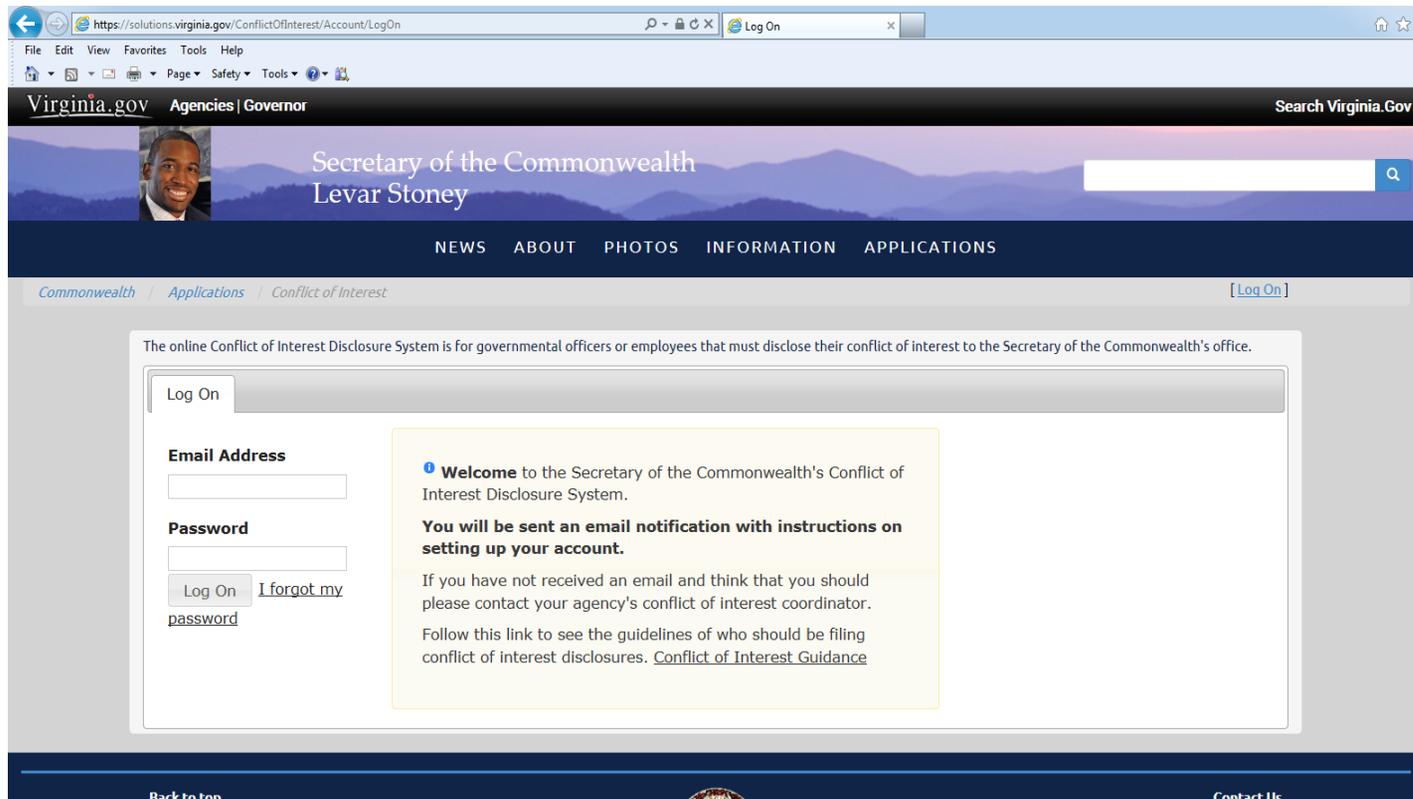
<https://bi.eadtest.vita.virginia.gov/ConflictOfInterest/>

If this is the first time you have filed your conflict of interest disclosure through the online system you will receive another email with instructions for registering. If you are a returning user you can log on using this email address. If you do not remember your password use the I forgot my password link on the log on page.

Thank you for your cooperation. If you have any questions please contact your agency conflict of interest coordinator.

Accessing the Conflict of Interest Disclosure System

Log-In Screen



Accessing the Conflict of Interest Disclosure System

Registration Email for New Users

- New users will receive this second email from the Conflict of Interest system. Click on the link to register the online account.

Your COV Conflict of Interest Reporting **account**. CRM:0007525 Inbox x  

 **Conflict of Interest Portal** ConflictofInterest@governor.virginia.gov to me Oct 25   

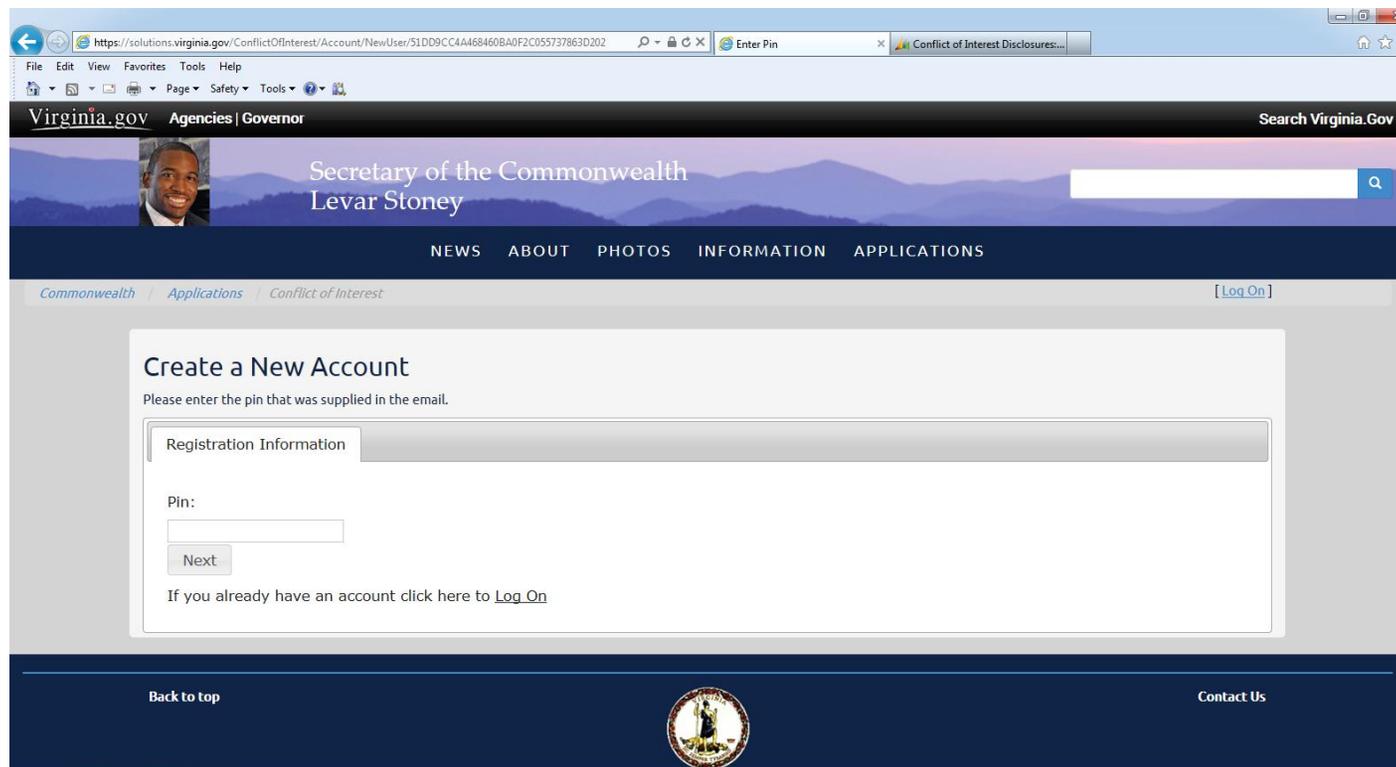
A new **account** has been created for you in the Conflict of Interest Reporting System via the Office of the Secretary of the Commonwealth. To set up your **account**

1. Navigate to the following link:
<https://bi.eadtest.vita.virginia.gov/ConflictOfInterest/Account/NewUser/093558D7AB934EF4830DC4FA5038D9968F>
2. Enter your pin:
339112
3. Follow the instructions to complete the registration process.

Thanks for your service to the Commonwealth. As a reminder, the deadline to file your conflict of interest disclosure is January 15.

Accessing the Conflict of Interest Disclosure System

Create New Account Screen: Enter the Pin Number Provided in the Registration Email



The screenshot shows a web browser window with the URL <https://solutions.virginia.gov/ConflictOfInterest/Account/NewUser/51DD9CC4A468460BA0F2C055737863D202>. The page header includes the Virginia.gov logo, navigation links for Agencies and Governor, and a search bar. The main content area features a banner for Secretary of the Commonwealth Levar Stoney and a navigation menu with links for NEWS, ABOUT, PHOTOS, INFORMATION, and APPLICATIONS. The breadcrumb trail shows the path: Commonwealth / Applications / Conflict of Interest. The central form is titled "Create a New Account" and contains the instruction: "Please enter the pin that was supplied in the email." Below this is a "Registration Information" section with a "Pin:" label and an input field. A "Next" button is positioned below the input field. At the bottom of the form, there is a link: "If you already have an account click here to [Log On](#)". The footer of the page includes "Back to top" and "Contact Us" links, along with the Virginia state seal.

Accessing the Conflict of Interest Disclosure System

Create New Account Screen: Set up Account

Conflict of Interest Disclosure System

Create a New Account

Use the form below to create a new account.

Passwords are required to be a minimum of 8 characters in length.

Passwords must contain 3 of the 4 attributes:

- a) Special characters,
- b) Alphabetical characters,
- c) Numerical characters
- d) Combination of upper and lower case characters

Account Information

Email address
vaqov2011+mrc64@gmail.com

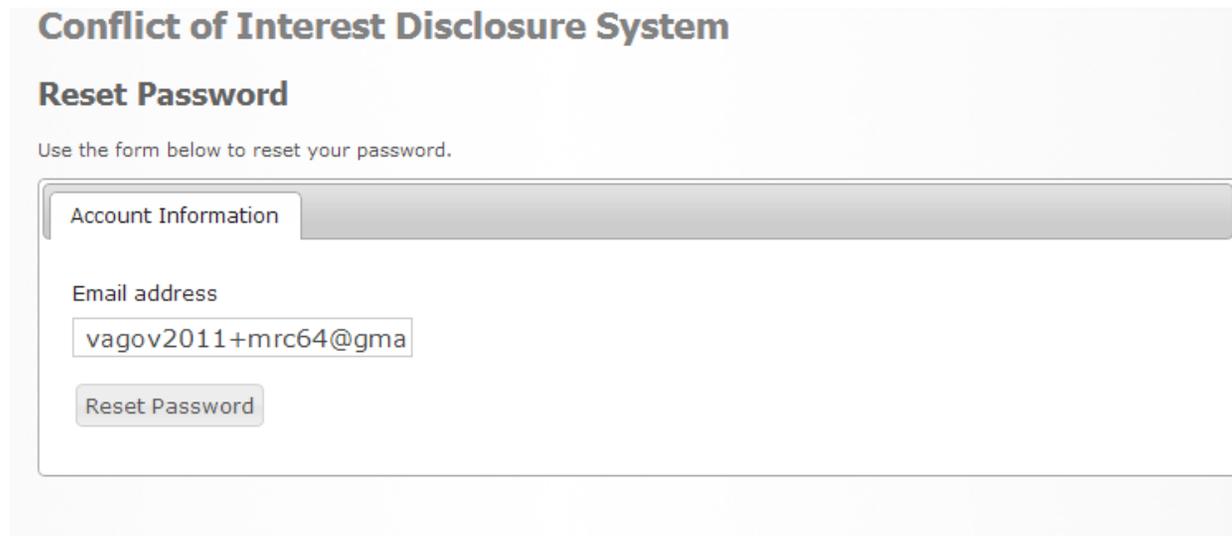
Password

Confirm password

Accessing the Conflict of Interest Disclosure System

- If you are a returning user, but do not remember your password, click on the “I forgot my password” option from the log-in screen. An email will be sent to your inbox that will allow you to access your account and reset your password.

Password Reset Screen 1

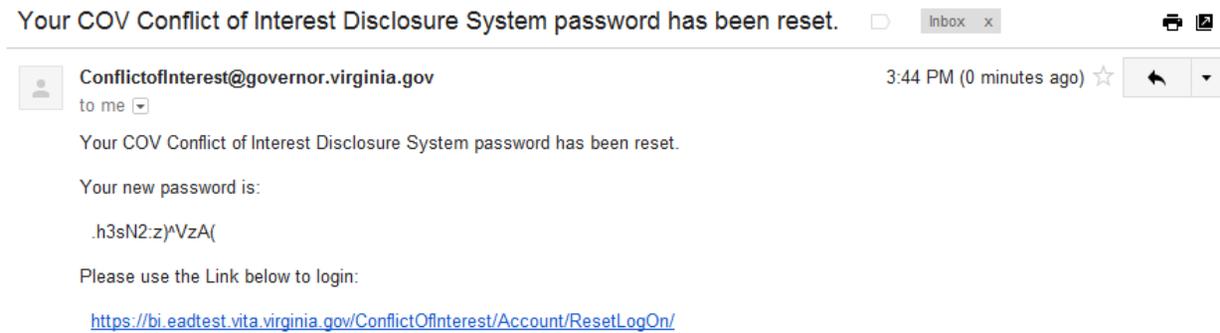


The screenshot shows a web interface for the Conflict of Interest Disclosure System. At the top, the title "Conflict of Interest Disclosure System" is displayed in a bold, dark font. Below the title, the heading "Reset Password" is shown in a bold, dark font. Underneath the heading, a small instruction reads: "Use the form below to reset your password." The form itself is a light gray box with a rounded top-left corner. It features a tab labeled "Account Information" on the left side. Inside the form, there is a label "Email address" followed by a text input field containing the email address "vagov2011+mrc64@gma". Below the input field is a button labeled "Reset Password".

Accessing the Conflict of Interest Disclosure System

- Existing users who have forgotten their account password will receive this e-mail to allow them to reset a new password

Reset Password Email Notification



Accessing the Conflict of Interest Disclosure System

Password Reset Screen 2

The **Current password** is the password provided by the COI system in the password reset email. It may be helpful to copy and paste the current password from the password reset email into the current password field.

The **New password** is the password created by the filer that meets the security criteria.

Conflict of Interest Disclosure System

The online Conflict of Interest Disclosure System is for governmental officers or employees that must disclose their conflict of interest to the Secretary of the Commonwealth's office.

Log On

Email Address

Current password

New password

Confirm new password

Change Password

Welcome to the Secretary of the Commonwealth's Conflict of Interest Disclosure System.

Use the temporary password that was emailed to you and choose a new password that meets the following criteria:

Passwords are required to be a minimum of 8 characters in length. Passwords must contain 3 of the 4 attributes:

1. Special characters,
2. Alphabetical characters,
3. Numerical characters,
4. Combination of upper and lower case characters

If you think you have reached this page in error, then please contact your agency's conflict of interest coordinator.

Individual Access- Completing and Filing a Disclosure Form

- After logging-in to the system, the “My Disclosures” section lists which form(s) you are required to file, as designated by your agency coordinator. By clicking on the link, users will then navigate to the form wizard which will walk you through your form page by page.
- If the list shows more than one disclosure form for a single year, the filer is only required to file one form. If it lists a Statement of Economic Interests and a Financial Disclosure form, only file the Statement of Economic Interests.
- **It is the responsibility of the filer to ensure that the disclosure filing is accurate and complete to the best of your knowledge.**

My Disclosures Screen

My Disclosures

Margaret D Sacks

Year	Agency	Forms Required
2013	Office of the Governor	• Statement of Economic Interests (Not Submitted) ← Click on the link to start the filing
2012	Office of the Governor	• Submitted Statement of Economic Interests (Complete)

** If this list shows more than one disclosure for a single year, you are only required to file one. If this list shows a Financial Disclosure and a Statement of Economic Interest for a single year, file only the Statement of Economic Interest.

Individual Access- Completing the Disclosure Form

Wizard: Follow on-screen instructions to advance through each page.

Statement of Economic Interests

Instructions

Instructions

Statement of Economic Interests

Select Schedules

Salary

Select Additional Schedules

Finalize Schedules

Schedule A - Offices and Directorships

Schedule B - Personal Liabilities

Schedule C - Securities

Schedule D - Payment for Talks, Meetings, and Publications

Schedule E - Gifts

Schedule F - Business Interests

Schedule G-1 - Payments for Representation by You

Schedule G-2 - Payments for Representation by Associates

Schedule G-3 - Payments for Representation Generally

Schedule H-1 - Real Estate - State Officers and Employees

Statement of Economic Interests

This wizard will guide you through completing your Statement of Economic Interests. You can press the next button to advance through the wizard, which will also save your work throughout the process. To return to an earlier step in the process, click the previous button. Do NOT press the back button in your browser as that will result in the loss of any unsaved data. Your session will timeout after 30 minutes of inactivity, which will also result the loss of any unsaved data. For reference, definitions of the terms used in the form can be found by clicking on the Definitions link in the corner on the upper right.

You MUST preview your form upon completion to verify that its contents are accurate prior to submission. After previewing your form, you must complete the process by electronically signing the form by typing your name as it appears in the form. By entering your electronic signature, you certify that the data you are providing the Secretary of the Commonwealth is true and accurate as of the date signed.

Pursuant to Sections 2.23114 and 2.23115 of the Code of Virginia, employees of state agencies who have been designated by the Governor or the General Assembly, and employees of local governments designated to file by the Code of Virginia or by their governing ordinance, are required to file this "Statement of Economic Interests" form.

Members of certain boards of state and local government are also required to file this form. Please note that within this form, the use of the words "office" and "officer" also apply to appointed board members.

In addition, candidates for state and local offices are required to file this form pursuant to Section 24.2502 of the Code of Virginia.

This filing is a condition of assuming office or employment and thereafter on or before January 15th of each year.

Schedules A through I are to be completed ONLY if you answer "Yes" to any of items 1 through 10 on the Statement of Economic Interests.

REMEMBER: The ANNUAL filing deadline is January 15th of each year.

For the annual filing:

Previous Next

Click the "Previous" and "Next" buttons to navigate within the wizard.

Statement of Economic Interests

Finalize

19 of 20 Complete

Your Statement of Economic Interests is ready for submission.

Please carefully review all the information on your Statement of Economic Interests and verify that it is accurate.

To review your form, press the preview form button below. **You MUST preview your form upon completion to verify that its contents are accurate prior to submission. After submission, you will no longer have the ability to modify this form.**

When you are ready to submit, please electronically sign the form by typing your name as it appears in the form. By entering your electronic signature, you certify that the data you are providing the Secretary of the Commonwealth is true and accurate as of the date signed.

After you submit your Statement of Economic Interests, you will receive an automatically-generated confirmation email at the email address you used to login. That confirmation email will contain a link to the Conflict of Interest website, where you will be able to view the official version of your submitted Statement of Economic Interests. IT IS SOLELY YOUR RESPONSIBILITY TO ENSURE THAT THE RECORD YOU SUBMITTED IS ACCURATE AND COMPLETE. If the form is inaccurate or unavailable, contact the Conflict Of Interest Director at ConflictOfInterest@governor.virginia.gov. You may be directed to complete an amendment, which will be filed with your original submission on the Commonwealth's servers.

I, the undersigned, do state that the information furnished on this disclosure and on any and all accompanying statements attached thereto, is to the best of my knowledge and belief, complete and accurate.

Verify Name

Michael Perzowski

YOU ACKNOWLEDGE THAT YOUR ELECTRONIC SIGNATURE ABOVE CONSTITUTES YOUR AGREEMENT AND INTENT TO BE BOUND BY THIS SUBMISSION. YOU ALSO AGREE THAT ANY AMENDMENTS YOU MAY SUBMIT REGARDING YOUR CONFLICT OF INTEREST DISCLOSURE SHALL BE ELECTRONIC.

Preview Form Previous Submit

Individual Access- Completing the Disclosure Form

Filers who submitted an electronic filing the previous year will have the ability to copy data from the previous year's filing. The "Copy From Last Year" button will append last year's data to your current filing in the relevant schedules or disclosure sections. This feature is available for every disclosure page except for the Business Service Category in the Financial Disclosure Statement.

After the "Copy From Last Year" feature adds the information into the form, you can delete a row of information that is no longer relevant, edit the information and add rows to enter new disclosure information.

The screenshot displays the 'Statement of Economic Interests' form, specifically the 'Salary' section. The form is titled 'Statement of Economic Interests' and has a sub-header 'Salary'. In the top right corner, it indicates '3 of 20 Complete' and a 'Definitions' link. The main content area contains instructions for reporting salary and wages, followed by a checkbox labeled 'Copy From Last Year'. Below this, there is a table with a header 'Name of Employer' and a 'Delete Row' button. An 'Add Row' button is also visible. The left sidebar contains navigation options for various schedules (A, B, C, D) and a 'Finalize Schedules' button. The bottom of the form has 'Previous' and 'Next' buttons.

Individual Access - Previewing the Form

- At the end of the wizard, users will be required to preview a draft of their filing before officially submitting the form online. At this point, a filer may print the filing for her records.
- Click “Preview Form” which will open a formatted version of the filing in another tab in the web browser. Review the form for accuracy and close the tab.

The screenshot shows the 'Statement of Economic Interests' finalization screen. The 'Finalize' section is active, displaying instructions and a 'Preview Form' button highlighted with a red box. The instructions state: 'Your Statement of Economic Interests is ready for submission. Please carefully review all the information on your Statement of Economic Interests and verify that it is accurate. To review your form, press the preview form button below. You MUST preview your form upon completion to verify that its contents are accurate prior to submission. After submission, you will no longer have the ability to modify this form.' The 'Preview Form' button is located at the bottom right of the form area.

The screenshot shows a browser window displaying the 'FINANCIAL DISCLOSURE STATEMENT' form. The browser address bar shows 'https://solutions.virginia.gov/ConflictOfInterest/FinancialDisclosure/GenerateForm.html?PubID=005-175-404-5.02'. The form content includes instructions for filing and definitions. The 'Preview Form' button from the previous screenshot is visible in the top right corner of the browser window, with a red dashed box around it and an arrow pointing to the text 'Review the filing for accuracy and close the tab by clicking on the “X” to the right of the tab.'

← Review the filing for accuracy and close the tab by clicking on the “X” to the right of the tab.

Example of a formatted filing that opens in a new browser tab, after clicking the “Preview Form” button.

Individual Access- Submitting the Form

- Type your name twice where indicated in the signature blocks, which constitutes a valid electronic signature and click “Submit.” A Statement of Economic Interests form is no longer required to be notarized.
- **Once a user’s form is submitted, it cannot be changed or resubmitted**, though it will be available for a user to view/print at any time throughout the year through their online account. If a user needs to amend a submitted filing, contact your agency coordinator to request that the record be unlocked for editing and resubmission.
- Any questions regarding the online filing process or general questions about the requirements of either form may be directed to the Office of the Secretary of the Commonwealth, Conflict of Interest Division.

The screenshot shows a web browser window with the URL `solutions.virginia.gov/ConflictOfInterest/FinancialDisclosure/NewFinancialDisclosureForm?dId=b6741a3a-12`. The page title is "Conflict of Interest - Financ...". The browser's address bar shows "Favorites Tools Help" and "Page Safety Tools".

The main content area displays the following instructions:

Your Financial Disclosure Statement is ready for submission.
Please carefully review all the information on your Financial Disclosure Statement and verify that it is accurate. After submission, you will no longer have the ability to modify this form.

To review your form, press the preview form button on the menu below. **You MUST preview your form upon completion to verify that its contents are accurate prior to submission.**

When you are ready to submit, please electronically sign the form by typing your name as it appears in the form into the box below. By entering your electronic signature, you certify that the data you are providing the Secretary of the Commonwealth is true and accurate as of the date signed.

Your draft disclosure has already been saved. If you wish to submit at a later time, close the wizard by clicking the X in the upper right corner of the wizard. You can submit at a later time by logging on to the conflict of interest website and clicking the disclosure.

Once you are satisfied with your responses, press the Submit button. After you submit your Financial Disclosure Statement, you will receive an automatically-generated confirmation email at the email address you used to login. That confirmation email will contain a link to the Conflict of Interest website, where you will be able to view the official version of your submitted Financial Disclosure Statement. IT IS SOLELY YOUR RESPONSIBILITY TO ENSURE THAT THE RECORD YOU SUBMITTED IS ACCURATE AND COMPLETE. If the form is inaccurate or unavailable, contact The Conflict Of Interest Director at ConflictOfInterest@governor.virginia.gov. You may be directed to complete an amendment, which will be filed with your original submission on the Commonwealth's servers.

Signature
Margaret D Sacks

YOU ACKNOWLEDGE THAT YOUR ELECTRONIC SIGNATURE ABOVE CONSTITUTES YOUR AGREEMENT AND INTENT TO BE BOUND BY THIS SUBMISSION. YOU ALSO AGREE THAT ANY AMENDMENTS YOU MAY SUBMIT REGARDING YOUR FINANCIAL DISCLOSURE STATEMENT SHALL BE ELECTRONIC.

Signature
Margaret D Sacks

At the bottom right of the page, there are three buttons: "Preview Form", "Previous", and "Submit". The "Submit" button is highlighted with a red rectangular box.

Email Confirmation of Online Filing Submission

- After electronically submitting their form, users will receive a confirmation email to inform them that the process is complete.

Email Confirmation

Your Conflict of Interest filing has been submitted. CRM:0007700  Inbox x  

 **Conflict of Interest Portal** ConflictofInterest@governor.virginia.gov 10:02 AM (6 hours ago) ☆  

to me 

Dear TestLoad Load01:

Thank you for submitting your 2012 Conflict of Interest Filing. The official PDF version of your submitted Conflict of Interest Filing can be found here <https://bi.eadtest.vita.virginia.gov/ConflictOfInterest/>. IT IS SOLELY YOUR RESPONSIBILITY TO ENSURE THAT THE RECORD YOU SUBMITTED IS ACCURATE AND COMPLETE. If the PDF is inaccurate or unavailable, contact Patrick Mayfield at ConflictofInterest@governor.virginia.gov. You may be directed to complete an amendment, which will be filed with your original submission on the Commonwealth's servers.

If you believe you have received this message in error, please contact Patrick Mayfield at ConflictofInterest@governor.virginia.gov.