

Conflict of Interest Disclosure System

Agency Coordinator 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

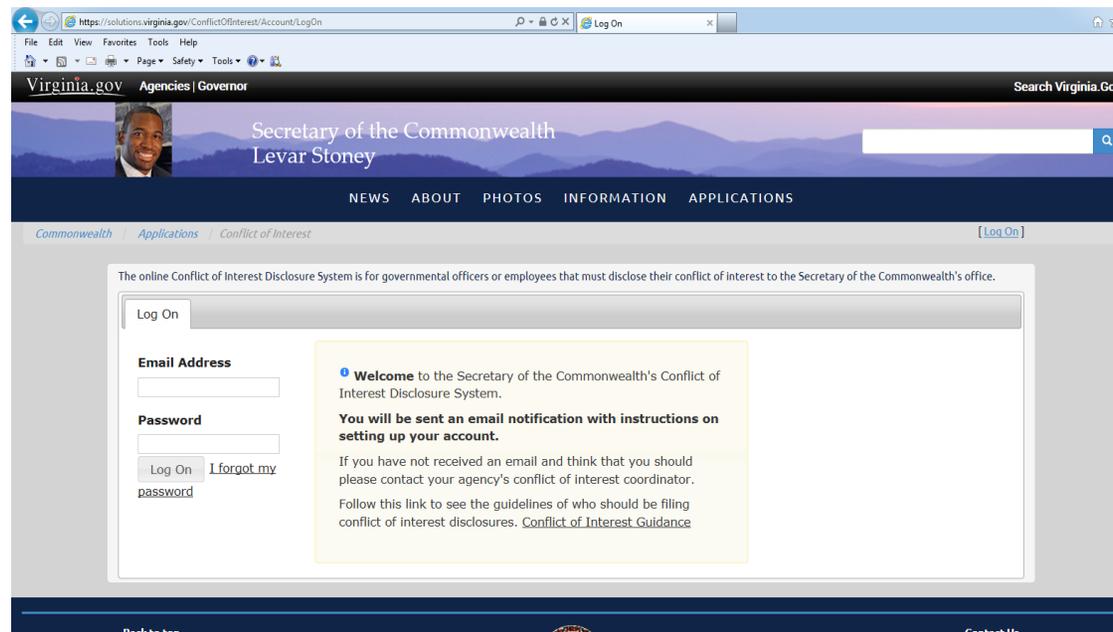
- **By November 30th** of each year, the Office of the Secretary of the Commonwealth will electronically send the official memorandum advising agency directors and coordinators to proceed with notifying their designated employees and board and commission appointees of the obligation to disclose their financial interests for the previous 12 months.
- 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 that report to the executive branch 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** of the next year. 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 is granted to users via the agency coordinator using the COI account creation and notification system.
- Coordinator access to the agency's filer list in the Conflict of Interest Disclosure System is granted by the Conflict of Interests Director in the Secretary of the Commonwealth's office.
- 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.

Conflict of Interest Disclosure System Log-In Screen



The screenshot shows a web browser window displaying the login page for the Conflict of Interest Disclosure System. The browser's address bar shows the URL: <https://solutions.virginia.gov/ConflictOfInterest/Account/LogOn>. The page header includes the Virginia.gov logo, navigation links for Agencies and Governor, and a search bar. Below the header, there is a banner for the Secretary of the Commonwealth, Levar Stoney, with a navigation menu containing links for NEWS, ABOUT, PHOTOS, INFORMATION, and APPLICATIONS. The main content area features a breadcrumb trail: Commonwealth > Applications > Conflict of Interest, and a [Log On] link. A central message box contains the following text: "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." Below this message is a "Log On" button and a "I forgot my password" link. To the right of the login form, a yellow callout box contains a welcome message: "Welcome to the Secretary of the Commonwealth's Conflict of Interest Disclosure System. You will be sent an email notification with instructions on setting up your account." Below the callout box, there is additional text: "If you have not received an email and think that you should please contact your agency's conflict of interest coordinator. Follow this link to see the guidelines of who should be filing conflict of interest disclosures. [Conflict of Interest Guidance](#)".

Coordinator Access- Create Agency Filing List and Notify Filers

- Agency coordinators will use the system to create Conflict of Interest accounts for new users and generate the annual filing records for new and returning users. Coordinators will direct the Conflict of Interest System to send all users the notification email containing the hyperlink for the online filing system, and for new users, the registration email.
- After an agency coordinator logs into the Conflict of Interest Disclosure System, you will arrive at the home page which displays “My Organizations” (those agencies or boards for which you are the designated coordinator) as well as “My Disclosures” (those agencies or boards of which you are an employee/ member and are required to file a disclosure).
- To begin, navigate to Step 1 and click on “Manage the disclosure list (Add Individuals).”

Home Page View

The screenshot shows the user interface of the Conflict of Interest Disclosure System. At the top, there is a navigation bar with 'Virginia.gov' and 'Agencies | Governor' on the left, and a search bar on the right. Below this is a banner for the Secretary of the Commonwealth, Levar Stoney. A secondary navigation bar contains links for 'NEWS', 'ABOUT', 'PHOTOS', 'INFORMATION', and 'APPLICATIONS'. A breadcrumb trail shows 'Commonwealth > Applications > Conflict of Interest'. A welcome message reads 'Welcome margaret.sacks@governor.virginia.gov! [Log Off]'. The main content area is divided into two sections: 'My Organizations' and 'My Disclosures'. The 'My Organizations' section is currently displaying the 'Office of the Governor' and shows a summary for the 2013 filing cycle, including a total of 98 individuals and a list of four steps with their respective counts and actions. The 'My Disclosures' section shows a table for 'Margaret D Sacks' with columns for 'Year', 'Agency', and 'Forms Required', listing two entries for the Office of the Governor.

Virginia.gov Agencies | Governor Search Virginia.Gov

Secretary of the Commonwealth
Levar Stoney

NEWS ABOUT PHOTOS INFORMATION APPLICATIONS

Commonwealth Applications Conflict of Interest Welcome margaret.sacks@governor.virginia.gov! [Log Off]

My Organizations

Office of the Governor

2013 - Office of the Governor - Conflict Of Interest Disclosures

98 total individuals have been entered in the system.

- **Step 1: Manage the disclosure list (Add Individuals)**
- **Step 2: Notify** - 1 Individuals have not been notified to complete their disclosures. | [View / Notify](#)
- **Step 3: Remind** - 36 Individuals have not completed their disclosures. | [View / Send Reminder](#)
- **Step 4: Mark As Received**(for paper forms) - 23 not submitted or received. | [View / Mark Received](#)

* If the date falls on a weekend or holiday, forms are due the **next business day**.

My Disclosures

Margaret D Sacks

Year	Agency	Forms Required
2013	Office of the Governor	<ul style="list-style-type: none">• Financial Disclosure Statement (Not Submitted) Preview Financial Disclosure Statement• Submitted Statement of Economic Interests (Complete)
2012	Office of the Governor	<ul style="list-style-type: none">• Submitted Statement of Economic Interests (Complete)

Step 1: Manage the Disclosure List

- Within this view, you will have a number of tools available to build and edit your list.
- When you initially log-in to create and manage the filing list for 2013, do not be alarmed that your disclosure list may be blank. You must first select the filers from your 2012 list to designate as 2013 filers.
- Click on the “Copy From Last Year” button.

Step 1: Manage List Screen

The screenshot shows a web interface for managing a disclosure list for 2013. At the top, there is a navigation bar with buttons for 'Home', 'Step 1: Manage List', 'Step 2: Notify', 'Step 3: Remind', and 'Step 4: Mark as Received'. Below this is the title 'Test Agency 2013' and a sub-section 'Disclosure List'. A link for 'Which form is required? (FAQ)' is present. A table with columns for 'First Name', 'Last Name', 'Email', 'Position', 'Year', 'Economic Interest', 'Financial Disclosure', 'Status', and 'Actions' is shown, but it is empty. Below the table, there are three buttons: 'Create New Contact', 'Copy From Last Year' (highlighted with a red box), and 'Back'. The page also shows 'Page 1 of 0' and 'No records to view'.

Step 1: Manage List- Copy from Last Year

- “Copy From Last Year” – Allows you to copy contacts previously entered into the Conflict of Interest System to populate your list for the current calendar year. By checking each box to the left of the desired contacts and clicking “Add Selected Contacts,” that individual or group of individuals will be imported to your current list.
- Sort the list by Last Name alphabetically or any of the headers by clicking on the header of the sort that you would like to perform.
- If there are more than 15 contacts that are eligible to be copied, the Copy Disclosures list will have multiple pages. You may check contacts on multiple pages, and add them all at once by clicking “Add Selected Contacts.”

[This is a sample Copy Disclosures screen.](#)

Note the checkboxes on the left, the paging near the bottom, and the “Add Selected Contacts” button.

Click this top box if you want to “select all” of your filers →

<input type="checkbox"/>	First Name	Last Name	Email	Position	Year	Statement of Economic Interest	Financial Disclosure
<input type="checkbox"/>	Fake	User 8	vagov2011+fake8@gmail		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	John	Doe	vagov2011+johndoe@gmail	Testing	2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Ip	VITA	vagov2011+ipvita@gmail	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test	subject 99	vagov2011+test999@gmail	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test	Subject 21	vagov+2011@gmail.com	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Joel	Filer	vagov2011+joel@gmail.c	Filer	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test	Subject 67	vagov2011+test67@gmail	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Fake	Two	vagov2011+fake2@gmail		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	New	Juan1	Vagov2011+juan1@gmail	Juan	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	fake	five	vagov2011+fake5@gmail		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CHRYS	WILKINSON	CHRYS.WILKINSON@VIT	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Fake	Filer 11	vagov2011+fake11@gmail	Tester	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Filing	User100	vagov2011+user100@gmail	Administrator	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Fake	One	vagov2011+fake1@gmail		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Lily	Ruth	Lily@perzanowski.org	Caregiver	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Add Selected Contacts Cancel

Otherwise, click each box to the left of the name(s) of the filers that you would like to copy. Then click “Add Selected Contacts.” Give the system sufficient time to generate the list.

Step 1: Manage List

- After identifying and adding those filers from the 2012 list to 2013, you may have new employees or appointees who must file an annual disclosure form.
- “Create New Contact”- If an individual is not in your Conflict of Interests database, this function allows you to create a new contact for an individual. If you are creating multiple new contacts to add to your list, use the “Save and Add New” function to create contacts consecutively.
- Once a contact is created, it is not possible to edit the email address registered to the filer. The coordinator must create a new account. If a filing record is tied to a contact account where the email address is wrong, delete the record entirely and create a new contact.

When you create a new contact you will be prompted to enter a name, e-mail address, and position. You must select which form the filer is required to file- the Statement of Economic Interests or the Financial Disclosure.

Create New Contact Screen

The screenshot shows a web application interface with a table of filers and a modal dialog box titled "Add New Contact".

Table Data (Visible in Background):

First Name	Last Name	Email Address	Position	Statement of Economic Interest Required	Financial Disclosure Required
John	Do			false	true
Mongo	File			true	false
Ip	Hon			false	false
Scrooge	McDi			true	false
Fake	On			true	false
Ip	Panc			true	false
Michael	Perzan			true	true
Peter	Perzan			true	false
Fake	Sev			true	false
fake	siv			true	false
Test	Subje			true	false
Test	Subje			true	false
Test	subjec			true	false
Fake	Thn			true	false

Dialog Box Fields:

- First Name: [Text Input]
- Last Name: [Text Input]
- Email Address: [Text Input]
- Position: [Text Input]
- Statement of Economic Interest Required
- Financial Disclosure Required
- Real Estate Disclosure Required
- Which form is required? (FAQ)
- Buttons: Save, Save & New, Cancel

Step 2: Notify

- Once the list is complete, agency coordinators will notify all filers of their obligation to submit their disclosure with the “Step 2: Notify” function.
- From this view, you will see a list of all users who have not been notified or who have not yet been granted access to the system. Using the “Create Accounts & Send Notifications” function, agency coordinators will direct the Conflict of Interest system to send a series of automatically generated emails to all users to notify them individually of their obligation to file. The notification email will include a hyperlink to access the account log-in screen. New users to the system will receive a second, registration email that will allow them to set up their account. A registered filer will not receive the account creation email. Once a coordinator clicks on “Create Account & Send Notifications,” please allow time for the action to complete itself in your browser window.
- **Agency coordinators should not send out notifications to filers from the system until they have received the official memorandum from the Office of the Secretary of the Commonwealth, by November 30th of each year.**

Step 2: Notify Screen

Virginia Lottery 2012

Home Step 1: Manage List Step 2: Notify Step 3: Remind Step 4: Mark as Received

Individuals Not Notified

First Name	Last Name	Position	Year	Agency/Group	Registration Status	Disclosure Notification	Reminder Last Sent
Test	Subject 67	Tester	2012	Virginia Lottery	Registered	Not Notified	
Fake	Filer 11	Tester	2012	Virginia Lottery	Registered	Not Notified	
Fake	Four		2012	Virginia Lottery	Registered	Not Notified	
Test	Subject 23	Tester	2012	Virginia Lottery	Registered	Not Notified	
Henry	Hill	Testing..	2012	Virginia Lottery	Registered	Not Notified	
Mike	Perz	IT Guy	2012	Virginia Lottery	Not Registered	Not Notified	
Fake	Filer 10	Tester	2012	Virginia Lottery	Registration En	Not Notified	
Ip	iPad	Tester	2012	Virginia Lottery	Registered	Not Notified	

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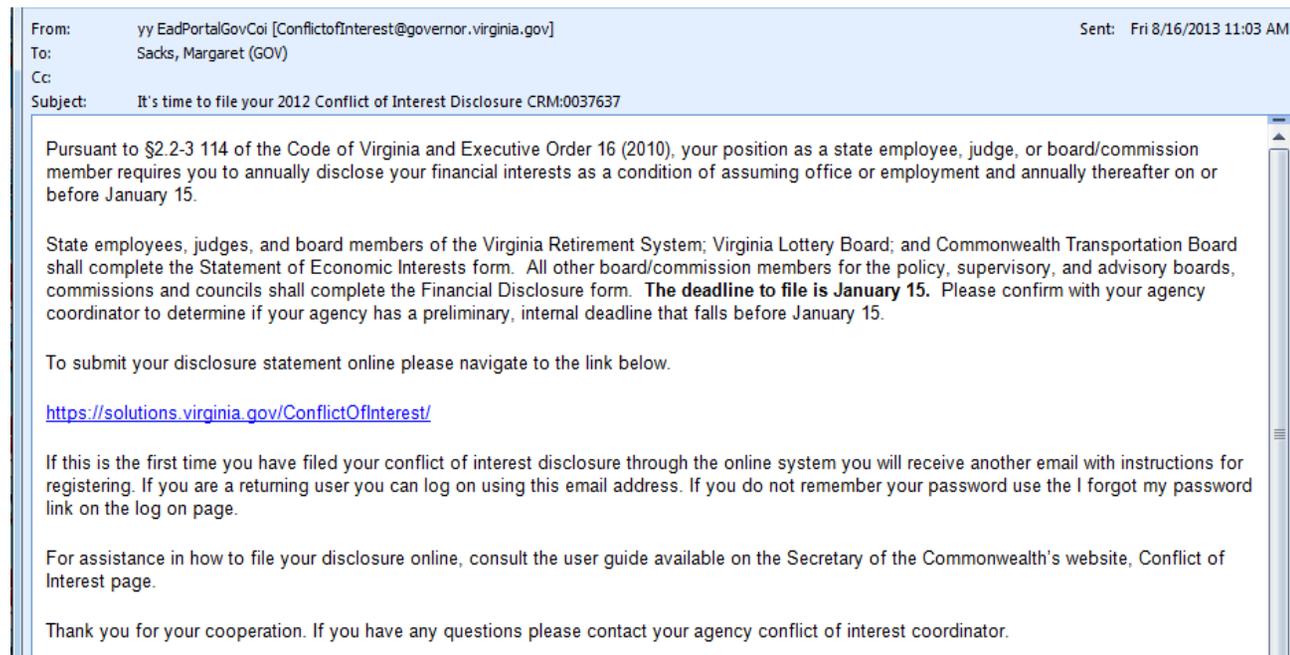
Create Accounts & Send Notifications Back

Click on this box when you have finalized your filing list and are ready to notify the designated filers.

Email Notification to Filers from the Conflict of Interests System

- After the coordinator clicks on the “Create Accounts & Send Notifications” button in Step 2: Notify, the COI system will send the notification email to all filers and the account registration email to new users.

Filing Notification Email



Registration Email to New Filers from the Conflict of Interests System

- A filer will click on the link in this email and enter the pin to register his or her account. Each filer has a unique registration link and pin.

Registration Email

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

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

to me 

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/093558D7AB934EF4830DC4FA503BD9968F>
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.

Step 2: Notify

- As new and returning users access the system to submit their disclosures, coordinators should remain aware of the user's Registration Status, Disclosure Notification Status, and Submission Status, to make sure that filers are able to access the system properly.
- For a new user, while they may have received an e-mail notification from the system, until their Registration Status reads "Registered," they have not yet activated their account.

Conflict of Interest Disclosure System

Account Registration / Disclosure Notification Summary

First Name	Last Name	Position	Year	Registration Status	Disclosure Notification
Test	Subject 67	Tester	2012	Registered	Notification Pending
Fake	Filer 11	Tester	2012	Registered	Notification Pending
Fake	Four		2012	Registered	Notification Pending
Test	Subject 23	Tester	2012	Registered	Notification Pending
Henry	Hill	Testing..	2012	Registered	Notification Pending
Mike	Perz	IT Guy	2012	Registration Email T	Notification Pending
Fake	Filer 10	Tester	2012	Registration Email S	Notification Pending
Ip	iPad	Tester	2012	Registered	Notification Pending

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Back

Step 3: Remind

- Once the primary notification has been emailed to all users, coordinators may use the “Step 3: Remind” function to monitor and follow up with those individuals who have not yet submitted their disclosure as the deadline approaches.
- In the “Step 3: Remind” tab, coordinators will see a list of users who have not yet filed and may select the “Send Email Reminder” function to simultaneously send out emails to **all** filers who have not yet filed their form. From here, you will also be able to monitor when the last reminder was sent.

Step 3: Remind Screen



The screenshot shows a web interface with a navigation bar at the top containing five tabs: Home, Step 1: Manage List, Step 2: Notify, Step 3: Remind (which is the active tab), and Step 4: Mark as Received. Below the navigation bar is a heading: "Individuals who have not submitted their disclosures". Underneath the heading is a table with the following columns: First Name, Last Name, Position, Year, Agency/Group, Registration Status, Disclosure Notification, Submitted Status, and Remind Last Sent. The table contains five rows of data:

First Name	Last Name	Position	Year	Agency/Group	Registration Status	Disclosure Notification	Submitted Status	Remind Last Sent
Fake	User 8		2012	Virginia Lotte	Registration Em	Notified on 11/8/2	Not Submitt	
Fake	One		2012	Virginia Lotte	Registered	Notified on 11/8/2	Not Submitt	
Test	Subject 67	Tester	2012	Virginia Lotte	Registered	Notified on 11/8/2	Not Submitt	
Ip	Panera		2012	Virginia Lotte	Registered	Notified on 11/8/2	Not Submitt	
John	One	Programmer	2012	Virginia Lotte	Registered	Notified on 11/8/2	Not Submitt	

Step 3: Remind

Reminder Email Notification

Your Conflict of Interest Disclosure is due CRM:0007670 Inbox x  

 **Conflict of Interest Portal** ConflictofInterest@governor.virginia.gov Nov 7 (1 day ago) ☆  

to me 

This email will serve as a reminder that the deadline for filing your annual conflict of interest disclosure is January 15

th. Please navigate to the link below to complete it.

<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 should have received 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 service to the Commonwealth. If you have any questions please contact your agency conflict of interest coordinator.

Accessing an Individual Filer's Contact Record

- This feature allows a coordinator to select individual filers to resend a registration email or send a reminder email.
- Go to Step 1: Manage the disclosure list (Add Individuals). Within this tab you will be able to use the Action Tools- Edit, Delete and Go To- to manage individual contact records.
- The “Go To” function (the wrench icon) allows you to individually contact a filer who has not yet submitted the disclosure, as well as view a copy of their disclosure once it has been submitted.
- Navigate to the user that you would like to email. Use the paging buttons if the user is not on the current page.

Disclosure List

[Which form is required? \(FAQ\)](#)

First Name	Last Name	Email	Position	Year	Statement of Economic Interest	Financial Disclosure	Submitted Status	Actions
u	1			2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	  
12	12			2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	  
a	a			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
a	a			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
abbb	ab			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
abc	abc			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
abc	abcd			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
ab	cd			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  
New	Contact	abc@abc.com	adsff	2013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	  
Money	Coordinator	vagov2011+Lotto@gmail.com	test	2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	  
New	Guy 13	vagov2011+ng12@gmail.com		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	  
j	j	j@j.com	j	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	  
k	k	k@k.com	k	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	  
l	l	l@l.com	l	2013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	  
fname	lname			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	  

 
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Action Tools

Pencil- Edit the filer's job position

Trash Can- Delete duplicate or unnecessary records

Wrench- Go to an individual record

Select a Filer's Individual Contact Record

- Click the wrench icon for the user that you would like to contact.

Disclosure List

[Which form is required? \(FAQ\)](#)

First Name	Last Name	Email	Position	Year	Statement of Economic Interest	Financial Disclosure	Submitted Status	Actions
u	1			2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	
12	12			2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	
a	a			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
a	a			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
abbb	ab			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
abc	abc			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
abc	abcd			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
ab	cd			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	
New	Contact	abc@abc.com	adsff	2013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	
Money	Coordinator	vagov2011+Lotto@gmail.com	test	2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	
New	Guy 13	vagov2011+ng12@gmail.com		2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	
j	j	j@j.com	j	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	
k	k	k@k.com	k	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Submitted	
l	l	l@l.com	l	2013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Submitted	
fname	lname			2013	<input type="checkbox"/>	<input type="checkbox"/>	None required	

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Individual Contact Record- Edit and Email

- The “Disclosure Detail” page will appear for the selected contact.
- Click “Edit Contact” to edit the filer’s first and last names.
- Click the “Registration” tab to direct the COI system to individually email the filer.
 - If a user needs the registration email resent, click “Send Registration.”
 - If the user has registered already, the “Send Registration” button will not appear.
 - If the user has not yet submitted a disclosure, you can send a reminder email by clicking “Send Reminder.”
- This tool will be helpful when the majority of your agency or board/commission filers have submitted their filings and you want to individually send additional reminders to those who have yet to file.

Disclosure Detail

New Contact - 2013 Registration

First Name
New

Last Name

Contact

Email
abc@abc.com

Edit Contact Back

Disclosure Detail

New Contact - 2013 Registration

Disclosure Notification Sent

Disclosure Reminder Last Sent

Registration status

Registration Email Sent

Username

Send Registration **Send Reminder**

Email Individual Users

- When an email is sent, the page will refresh with a confirmation message.

Disclosure Detail

Registration Email will be sent

New Contact - 2013 Registration

First Name
New

Last Name
Contact

Email
abc@abc.com

[Edit Contact](#) [Back](#)

Registration Email will be sent

Step 4: Mark as Received for Paper Filers

- As users submit their disclosure forms online, agency coordinators will be able to monitor the submission status of an employee's form as it is received by the system as indicated in the "Status" column in Step 1.
- Check the box in the "Received by Coordinator" column in Step 4 to acknowledge filers who submit a hard copy filing. That form should then be sent via mail or email to the Conflict of Interest Director in Secretary of the Commonwealth's Office.
- At this time, marking a filer's hard copy submission as received in Step 4 will not change the submission status in Step 1 from "Not Submitted" to "Submitted." Step 1 "Submitted Status" only reflects the submitted status of those filers who file online.

Step 4: Mark as Received Screen

The screenshot shows a web interface for 'Step 4: Mark as Received'. At the top, there are navigation tabs: Home, Step 1: Manage List, Step 2: Notify, Step 3: Remind, and Step 4: Mark as Received (which is active). Below the tabs is the heading 'Individuals who may be filing on paper'. A table with the following columns is displayed: First Name, Last Name, Position, Year, Registration Status, Disclosure Notification, Submitted Status, and Received By Coordinator. The first row contains the data: Bob, Filer, Tester, 2013, Registration Exp, Notified on 11/1, Not Submitted, and an unchecked checkbox. The 'Received By Coordinator' column is highlighted with a red border. At the bottom of the table, there is a pagination bar showing 'Page 1 of 1'. Below the table are two buttons: 'Back' and 'View Paper Copies Marked Received'.

First Name	Last Name	Position	Year	Registration Status	Disclosure Notification	Submitted Status	Received By Coordinator
Bob	Filer	Tester	2013	Registration Exp	Notified on 11/1	Not Submitted	<input type="checkbox"/>

Individual Filing for Agency Coordinators

- If an agency coordinator is required to submit his or her own filing, the relevant form and link to start the filing process is in the “My Disclosures” section of the COI home page. An agency coordinator would be required to file a Statement of Economic Interests if the coordinator works in a position that her agency has designated as one required to file. An agency coordinator would be required to file a Financial Disclosure form if he is an appointee to an executive-level board or commission.
- Click on the link to navigate to the form wizard to answer the questions, disclosure the relevant information and submit online.

My Organizations

Office of the Governor

2013 - Office of the Governor - Conflict Of Interest Disclosures
 98 total individuals have been entered in the system.

- **Step 1:** [Manage the disclosure list \(Add Individuals\)](#)
- **Step 2: Notify** - 1 Individuals have not been notified to complete their disclosures. | [View / Notify](#)
- **Step 3: Remind** - 36 Individuals have not completed their disclosures. | [View / Send Reminder](#)
- **Step 4: Mark As Received**(for paper forms) - 23 not submitted or received. | [View / Mark Received](#)

* If the date falls on a weekend or holiday, forms are due the next business day.

My Disclosures

Margaret D Sacks

Year	Agency	Forms Required
2013	Office of the Governor	<ul style="list-style-type: none"> • Financial Disclosure Statement (Not Submitted) Preview Financial Disclosure Statement • Submitted Statement of Economic Interests (Complete)
2012	Office of the Governor	<ul style="list-style-type: none"> • Submitted Statement of Economic Interests (Complete)

My Disclosures

Margaret D Sacks

Year	Agency	Forms Required
2013	Office of the Governor	<ul style="list-style-type: none"> • Statement of Economic Interests (Not Submitted)
2012	Office of the Governor	<ul style="list-style-type: none"> • Submitted Statement of Economic Interests (Complete)

Individual Filing for Agency Coordinators- Entering Information

- Information entered in the online form including in the relevant schedules is saved when a filer clicks the “Next” button to advance to the next page. To ensure that the disclosed information is saved by the system, click the “Next” button per page.

Wizard: Follow on-screen instructions to advance through the form.

The screenshot shows a web browser window titled "Statement of Economic Interests". The interface is a wizard with a left-hand navigation pane and a main content area. The navigation pane lists various sections: "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", and "Schedule H-1 - Real Estate - State Officers and Employees". The main content area is titled "Statement of Economic Interests" and contains several paragraphs of text. The first paragraph explains the wizard's purpose and warns against using the browser's back button. The second paragraph states: "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." The third paragraph discusses the legal requirements for filing. The fourth paragraph mentions that candidates for state and local offices are also required to file. The fifth paragraph states: "This filing is a condition of assuming office or employment and thereafter on or before January 15th of each year." The sixth paragraph notes that Schedules A through I are to be completed only if the user answers "Yes" to any of items 1 through 10. The seventh paragraph is a reminder: "REMEMBER: The ANNUAL filing deadline is January 15th of each year." The eighth paragraph says: "For the annual filing:". At the bottom right of the window, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with a red rectangular box.

Use the “Previous” and “Next” buttons to navigate within the wizard. Do not use the “Back” and “Forward” buttons of the Internet browser.

Individual Filing for Agency Coordinators- Submitting 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 'Finalize' step of the 'Statement of Economic Interests' filing process. The interface includes a sidebar with navigation options like 'Instructions', 'Statement of Economic Interests', 'Select Schedules', and various 'Schedule' options (A through G-3). The main content area contains instructions and a 'Verify Name' field with the name 'Michael Perzanowski' entered. At the bottom, there are three buttons: 'Preview Form' (highlighted with a red box), 'Previous', and 'Submit'.

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

The screenshot shows a browser window displaying the 'FINANCIAL DISCLOSURE STATEMENT' for the Secretary of the Commonwealth. The document is titled 'SECRETARY OF THE COMMONWEALTH' and 'FINANCIAL DISCLOSURE STATEMENT'. It contains detailed instructions for filing, including the annual filing deadline of January 15th and specific requirements for State Board Members and Local Board Members. The document also includes definitions and explanatory material for terms like 'Business' and 'Clear financial association'.

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

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.
- A confirmation email from the Conflict of Interests system will be sent upon successfully submitting the filing.
- **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 - Financial...". The browser's address bar shows "Page", "Safety", "Tools", and "Help". The page content includes a sidebar with a navigation menu and a main content area with instructions and signature fields.

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

Finalize

Preview Form Previous **Submit**

Email Confirmation of Online Filing Submission

- After electronically submitting their form, users will receive a confirmation email in their inbox 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.

Filer Access to the Conflict of Interest Disclosure System

Create a 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 browser tabs include "Enter Pin" and "Conflict of Interest Disclosures...". The page header features the Virginia.gov logo, "Agencies | Governor", and a search bar. Below the header is a banner for the Secretary of the Commonwealth, Levar Stoney, with a navigation menu containing "NEWS", "ABOUT", "PHOTOS", "INFORMATION", and "APPLICATIONS". The breadcrumb trail reads "Commonwealth / Applications / Conflict of Interest" and includes a "[Log On]" link. The main content area 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, an input field, and a "Next" button. A link for existing users is provided: "If you already have an account click here to [Log On](#)". The footer contains "Back to top", the Virginia state seal, and "Contact Us".

Filer Access to the Conflict of Interest Disclosure System

Create a 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

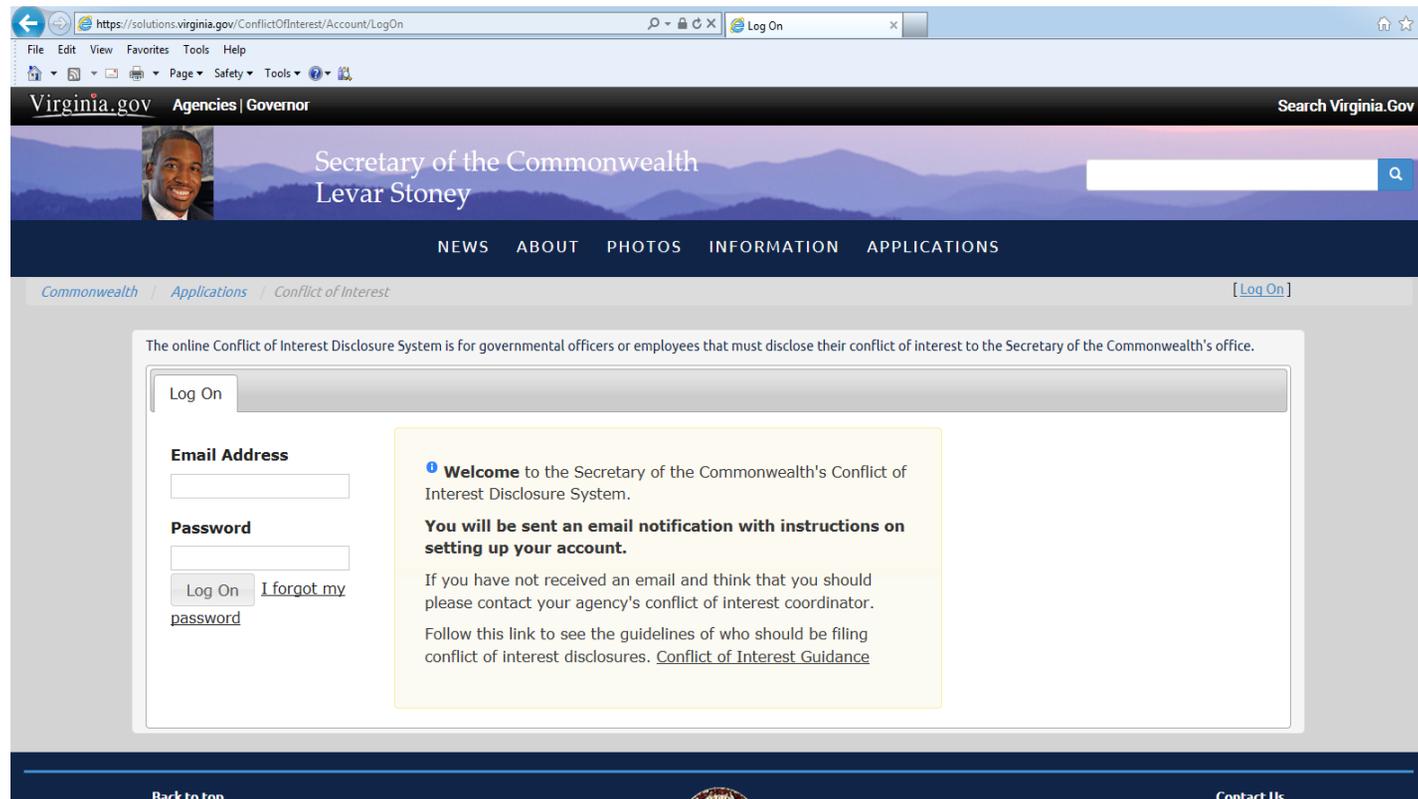
Email address
vagov2011+mrc64@gmail.com

Password

Confirm password

Filer Access to the Conflict of Interest Disclosure System

Log-in screen for registered users



Individual Access

- After logging-in to the system, the “My Disclosures” section will provide the link to the required disclosure form to be completed by the filer and submitted online. Click on the link and the form wizard will guide the filer through the form.
- **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	<ul style="list-style-type: none">• Statement of Economic Interests (Not Submitted)
2012	Office of the Governor	<ul style="list-style-type: none">• 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.

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.

Reset password screen 1

Conflict of Interest Disclosure System

Reset Password

Use the form below to reset your password.

Account Information

Email address

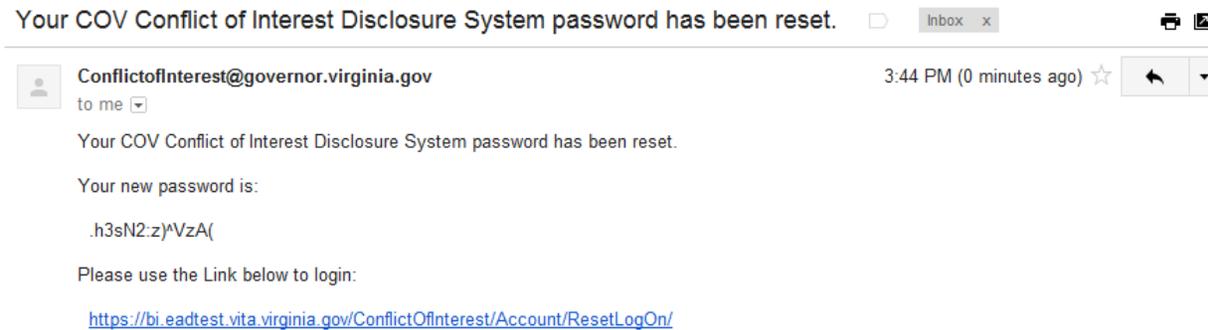
vagov2011+mrc64@gma

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 set a new password.

Password reset email notification



Accessing the Conflict of Interest Disclosure System

- The current password is the system-generated password provided in the reset password email
- The filer creates a new password that complies with the requirements

Password Reset Screen 2

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

i **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.