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Introduction

Financial disclosure is the filing of a form, usually on an annual basis, disclosing certain financial interests that may relate to the conflict of interest provisions in the Law. The purpose of the Financial Disclosure law is to provide documents that demonstrate to the public that financial interests are not hidden and that officials and employees are not engaging in conflicts of interest. The statement requires the disclosure of interests held in real property, interests in corporations and partnerships, gifts received, etc.

This web-based application is used to create an electronic Financial Disclosure Statement. The statement is comprised of multiple schedules. Each schedule appears on its own screen. You must, for each schedule, either make an entry (or entries) or indicate that you are not required to complete the schedule. You will NOT be able to submit your statement until EVERY SCHEDULE has been completed.
The Web-Based Financial Disclosure Statement

Register as a User

Before you can login and use the program, you must register as a user. This involves providing the program with an email address, a password, and a security question.

![Login Screen]

The first time that the login screen appears, click on the “Register” link.
Enter your validation code and then click on the “Next” button.

The user in the example above had the last name “Maretti” and was born in 2/2/1965. Notice that the name is entered in all capital letters and leading zeroes are included in the date of birth.
CREATE A NEW ACCOUNT

Use the form below to create a new account.

Passwords are required to be a minimum of 6 characters in length.

BE AWARE: A test email message will be sent a few minutes AFTER you click on the Create User button. Please correct your email entry if you do not receive the message.

Account Information

Email:

dwmartin@harfordcountymd.gov

Password:

Confirm Password:

Security Question

What is your favorite color?

Security Answer

green

All of the account information is required. Enter it and then click on the “Create User” button.

BE AWARE: The email address that you enter on this screen will also become your login ID. Choose it with care!
If you entered your email address correctly, you should receive a message similar to the one above within a few minutes. Please DO NOT REPLY to it.

When the above screen appears, select your agency from the drop-down list. Also, enter a complete current agency address where you can be sent correspondence and identify your agency position.

You can correct your email address on this screen if you did not receive your test message. You can use the “Test Email” button as many times as you need to in order to make sure that you entered it correctly. Be aware that because the email address is also your User ID, the program will LOG YOU OFF after you change your email address and click on the “Save” button. You must then log back in using your new email address.
Click on the “Save” button when you are finished.

Click on the “Finish” button to continue
General Instructions Tab

Once you have logged-in, you can click on the “General Instructions” tab if you wish to. Click on the “Home” tab when you are finished.
Logout / Login

You can logout by clicking on the “[ Log Out ]” link at the top of the screen. Be sure to logout any time you need to leave the program unattended. It prevents security issues and web form timeout errors!

It is a simple matter to login again.
Initial (Default) Screen

* Click on the Schedule A button above to get started. Do not leave any schedule unanswered! *

There are three parts to the default screen: the command buttons on the left side, the “Information we have for you on file” panel at the top, and the “Summary of Responses” panel at the bottom.
Click on the “update” link if you wish to change your email address, etc.

Click on “Save” to keep your changes or “Cancel” to abort them.
Your “Summary of Responses” will automatically be filled-in as you progress through the schedules. For each schedule, you must either make entries (and then indicate that you have no more entries to make) or indicate that you do not need to complete the schedule. You will not be allowed to submit your statement until you are finished with all of the schedules.
Completing the Schedules

Every schedule has its own screen. You may find it helpful to complete them in order. Click on the “Schedule A” button to get started.

If you have real estate holdings to report, select “Yes” and then click on the “Submit” button.
The questions are of various types. In the example above, the “Street Address”, “City”, and “Zip Code” (1) are simple text boxes and the property type (2) is a drop-down list. (“State” is also a drop-down list.)
The “encumbrances” question above (6) is a Yes/No radio button. You must select one or the other but you cannot select both.

Sometimes, your answer to a question will cause you to be presented with additional questions. When that happens, the additional question numbers have lower-case letters associated with them. In the example above, question 6a was presented because question 6 was answered with a click on the “Yes” button.

Once you have completed the form, be sure to click on the “Save” button. Your work will be lost if you do not! You can also click on “Cancel” if you do not wish to keep your changes.
After you save a schedule record, you will see it listed at the bottom of the schedule screen. You can edit or delete it as you see fit.

If you wish to add another record click on the “Yes” selection. Otherwise click on the “No” selection (you can still add more records later on if you need to). Either way, you must click on the “Submit” button to continue.
In the prior example, it was indicated that there were no more Schedule A records to be added so the Instructions for Schedule B were displayed. If “Yes” had been selected then a blank Schedule A form would have been displayed instead.

The above example shows how to edit (or delete) as specific record when you have made multiple schedule entries.
### Summary of Responses

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>I held interests during reporting period in real property located in or outside Maryland. (If &quot;Yes,&quot; complete Schedule A.)</td>
<td>✔</td>
</tr>
<tr>
<td>B.</td>
<td>I held interests during reporting period in corporations, partnerships and similar entities. (If &quot;Yes,&quot; complete Schedule B.)</td>
<td></td>
</tr>
<tr>
<td>C.</td>
<td>I held interests in a non-corporate business entity which did business with the County. (If &quot;Yes,&quot; complete Schedule C.)</td>
<td></td>
</tr>
<tr>
<td>D.</td>
<td>I received gifts during reporting period from persons doing business with the County, regulated by the County, or registered or required to register as lobbyists. (If &quot;Yes,&quot; complete Schedule D.)</td>
<td></td>
</tr>
<tr>
<td>E.</td>
<td>I or a member of my immediate family was a partner or held an office, directorship, or salaried employment during reporting period in or with a business entity doing business with the County. (If &quot;Yes,&quot; complete Schedule E.)</td>
<td></td>
</tr>
<tr>
<td>F.</td>
<td>I or a member of my immediate family owed debts (excluding retail credit accounts) during reporting period to persons doing business with the County. (If &quot;Yes,&quot; complete Schedule F.)</td>
<td></td>
</tr>
<tr>
<td>G.</td>
<td>A member of my immediate family was employed by the County during reporting period. (If &quot;Yes,&quot; complete Schedule G.)</td>
<td></td>
</tr>
<tr>
<td>H.</td>
<td>I or a member of my immediate family received a salary or was sole or partial owner of a business entity from which earned income was received, during the reporting period. (If &quot;Yes,&quot; complete Schedule H.)</td>
<td></td>
</tr>
<tr>
<td>I.</td>
<td>Is additional information set forth on Schedule I? (If &quot;Yes,&quot; complete Schedule I.)</td>
<td></td>
</tr>
</tbody>
</table>

The next time we login we can see that Schedule A has been completed. All of the schedules must be complete (either Yes or No) before the disclosure statement can be submitted.

Note that if you make an entry to schedule but do not indicate that you are finished with the schedule a check will not appear in either box. (Because the program assumes that you are going to return and make more entries.)
What about Schedules that Do Not Apply to You?

As an example, let us say that you are not required to fill-out Schedule B. Select “No” and then click on “Submit”.

Click on the checkbox and click on the “Submit” button.

The “Summary of Responses” will reflect your actions the next time you login.
Reviewing Your Statement

Click on the “Review Statement” button to produce a PDF document showing all of your current entries. **The process may take several minutes.**

You can Open (view) or Save the document as you like.

You need Adobe Reader to open the statement. It will allow you to both view and print. All of the schedules that you have completed will be included.
Delete Your Statement?

Click on the “Delete Statement” if you wish to start completely over. It removes every entry that you have made from every schedule. Note that you cannot delete your statement after you have submitted it.

DELETE STATEMENT

Note: Please be aware that deleting your statement will permanently remove all data that has been saved for this statement.

Once deleted this statement data cannot be recovered by any means.

Once you submit this statement it cannot be deleted.

Please enter your initials – Note that, by initiaing here, you are certifying that you wish to delete your un-submitted data related to the current statement and take full responsibility for any data lost.

Enter your Initials Exactly as Shown to indicate that you wish to delete the data for this statement.

D. W. M.

D. W. M.

Delete Statement  Cancel

Enter you initials EXACTLY as shown (letter case, spaces, etc.) and then click on the “Delete Statement” button.

Below are Your Existing Schedule A Entries

<table>
<thead>
<tr>
<th>Function</th>
<th>Location of Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>246 Kensington Parkway</td>
</tr>
<tr>
<td>Edit</td>
<td>614 Silverbell Drive</td>
</tr>
</tbody>
</table>
How to Change Your Password

It is a simple matter to change your password. Just follow the directions on the screen.
Once you have made entries for all of the schedules you can submit your statement. Be aware that the process will take several minutes and you cannot make any more changes after submission.
Enter your initials EXACTLY as shown (letter case, spaces, etc.) and then click on the “Submit Statement” button.

Your statement is being generated. Please Wait.

The process may take several minutes.
At this point, you can view the statement but no modifications are possible.

A copy of your statement should arrive within a few minutes.

The statement is sent as a PDF attachment.