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E-filing Tips & Important Reminders for 2024

Confidentiality Exemptions

- ✓ **CONFIDENTIAL FILERS** are designated as such on their filing dashboard. These are filers who are eligible under s. 119.071 to have certain information redacted from their form because they have held certain positions or meet specific criteria. By law, a notarized confidentiality request MUST be received by the Commission before agency staff can apply certain redactions. Requests cannot be submitted as a part of the electronic form. Filers should submit these requests prior to filing their disclosure. The public records exemption request forms are available on the Commission's website and can be submitted prior to January 1, 2024, for officials with an early qualifying period: <https://www.ethics.state.fl.us/FinancialDisclosure/DownloadAForm.aspx>.
 - Confidential filers are designated with "Confidential Filer" in red, next to their name on the Filer Dashboard.
 - **Local filers who previously filed with their Supervisor of Elections** were designated as confidential filers, must file a notarized, written request with the Commission to be designated a "Confidential Filer." The exemption request on file with the Supervisor of Elections does not apply to documents filed with the Commission. The above-referenced form should be used to request confidentiality.

Filers who have a confidentiality request on file with the Commission are noted as confidential filers in the system. After a confidential filer's form is filed, it is redacted by the Commission's staff, prior to publication on the website.

How to Register and Login

- ✓ Officeholders who e-filed in 2023 will use their same username and password to login.
- ✓ Officeholders and employees who are new to the system in 2024 and need access to the system prior to April 2024 will need to request an invitation to register by clicking on the "I am a Filer" link on the login page (<https://disclosure.floridaethics.gov/>) and following the prompts.
- ✓ Registration invitations will be emailed to **all filers without an active username and password**, in the spring.
- ✓ A brief "how-to" login video is accessible via the green button on the "I Am A Filer" button, on the e-filing page. Current officeholders and employees **must** access the system from the "I am a Filer" button to file electronically, even when preparing a disclosure to qualify for office.

Login

Please tell us what type of user you are:

- I am a Filer**
If yes, click here to file a Form 6, Form 1 or Form 2.
- I am a Candidate**
Are you a non-incumbent candidate who is attempting to qualify for office, but do not currently hold a public position that requires financial disclosure? If yes, click here.
- I am an Organization Coordinator**
- I am a CPA or Attorney who is assisting a filer**

- ✓ Individuals who wish to qualify for office, but are **not current officeholders or employees** who file financial disclosure will prepare and print a Form 1 or Form 6 by clicking the "I am a Candidate" button on the e-filing page. A brief "how-to" video is available to assist candidates with accessing the system. These candidates will complete the disclosure in the system, print their form, and take it to their qualifying officer for filing. See the qualifying information on the Commission's website.
- ✓ Resources for filers:
 - A webinar overview of EFDMS for filers on the login page.
 - A link to printable instructions for the electronic Form 6 and a sample form is on the forms page of the Commission's website:
<https://ethics.state.fl.us/FinancialDisclosure/DownloadAForm.aspx>.

E-filing Form 6 and Form 1

- ✓ The system walks filers through the various sections of the disclosure with questions and answers. There are also helpful pop-outs throughout the form. Searchable FAQ's are linked in the upper right side of the disclosure.

The screenshot shows the Florida Commission on Ethics Electronic Financial Disclosure Management System (EFDMS) interface. The top navigation bar includes 'HOME' and 'FAQ' links. The main content area displays the '2021 Form 6 - Full and Public Disclosure of Financial Interests' with the 'Income' section selected. The 'Primary Sources of Income' section asks: 'Do you have any Primary Sources of Income that need to be reported?' with 'Yes' and 'No' buttons. A sidebar on the left contains 'Resources' and 'Instructions' sections. A blue arrow points from the text above to the 'FAQ' link in the top right corner.

- ✓ Full set of printable instructions are available throughout the disclosure.
- ✓ Filers can manually enter each asset into the system. There is also an option to use an import feature that allows filers to import a list of information from an excel spreadsheet. This allows filers to download their brokerage statement or other Excel spreadsheet information and copy/paste columns into a template that can be uploaded to the system. The how-to video and template are linked in the assets section of the disclosure.

The screenshot shows the 'Assets' section of the EFDMS interface. It features a table with three columns: 'DESCRIPTION OF ASSET', 'VALUE OF ASSET', and 'ACTIONS'. The 'DESCRIPTION OF ASSET' column has a text input field with the placeholder 'Please enter a description'. The 'VALUE OF ASSET' column has a text input field with a '\$' symbol and the placeholder 'Please enter a number'. The 'ACTIONS' column has a red document icon. At the bottom right, there is a '+ Add Item' button. A blue arrow points from the text above to the '+ Add Item' button.

- ✓ A PDF document upload feature is now available for filers to upload relevant documents to include as a part of their Form 6 filing. Filers who choose this option in any section(s) of the form will be routed to a PDF upload page containing instructions about PDF uploads.
- ✓ By law, all forms filed in EFDMS will be published to the Commission's website.
- ✓ The system performed well in 2023. Public officers and employees who filed electronically in 2023 experienced a smooth filing process with very few issues. We look forward to working with you as we transition to e-filing and recognize there will be a learning curve as everyone adjusts to this new way of reporting financial interests. Florida Commission on Ethics is ready to help you through the process. Call us at 850-488-7864.