

SEI Home Page

Once you log in, the system always opens to your account's home page. Your account's home page contains the following sections.

Menu System

MAIN MENU

The main menu displays on all pages in the system and contains three links:

- Home - Click this link to move back to this page - your account's home page.
- Log Out - Click this link to log out of your account.
- NetFile User - Displays your name. Click on your name to open the NetFile User Home page where you may change your NetFile User password and NetFile User e-mail address.

LINKS MENU

This section appears in the system on the right side of every page. The areas that appear in this section display links to videos, documentation and user information including:

- NetFile Video Tutorials - Lists links to short videos about the page you are viewing. The content of this area changes as you move through the system.
- NetFile Help Files - Lists links to download NetFile-produced documentation as PDF files and also displays information about how to get help with questions about the software.
- FPPC Help Files - Lists links to download FPPC-produced documentation as PDF files and also displays information about how to get help with reporting questions.
- NetFile User Links - Lists links to open your NetFile User Home page and to change your NetFile User password and e-mail address.

Main Content

YOUR FILING CATEGORY INFORMATION

This section lists information about the category or categories that define the level of disclosure you must meet when filing for the position or positions you occupy. Some agencies do not post this information. If you have questions about categories, contact your filing authority.

FILINGS TO COMPLETE

This section lists the filings your agency requires you to complete. You may combine some filing requirements into a single filing. Check with your filing authority before combining filing requirements or if you have questions about the filings your agency lists in this area.

Starting a Filing

To start a filing:

1. Select the filing's Create check box.
2. Click the Start Selected 700 Document button. The filing opens to the Cover Page.

COMBINING FILING TYPES

Consult your agency representative before you combine filing types.

To combine filing types into a single statement:

1. Select the first filing's Create check box.
2. Select the second filing's Create check box.
3. Click the Start Selected 700 Document button. The filing opens to the Cover Page. In the Type of Statement section, both filing types are selected.

Continuing a Filing

When you start a filing the system retains all the information in the statement when you log out of the system before completing the filing. To continue an incomplete filing, click the filing's Edit link in the Filings to Complete table on the Home page. The Cover Page opens and you may continue the filing as you require.

Deleting a Filing

You may find that you need to delete a filing that you have started. If so, go to the Home page and then click the filing's Delete button. Click the OK button on the dialog. The system deletes the filing, but does not delete the filing requirement.

IN-PROGRESS AMENDMENTS

This section appears only when you amend a previous filing. It lists all in-progress amendments. See [“Amending an E-Filed Statement” on page 7](#) for information about creating an amendment.

Continue an In-Progress Amendment

When you start an amendment the system retains all the information in the amendment when you log out of the system before completing the amendment. To continue an incomplete amendment, click the amendment's **Edit** link in the In-Progress Amendment table on the Home page. The Cover Page opens and you may continue the amendment as you require.

E-FILING HISTORY

This section lists your e-filed documents along with the history of the document. The history displays:

- the Filing Date
- your agency Filer ID
- the filing's ID

Viewing an E-Filed Statement

To view an e-filed statement, click the statement's View link in the Filing History table. The system opens your e-filed statement as a PDF file.

Amending an E-Filed Statement

Before you create an amendment to a previously e-filed statement you need to know that the system will not create an amendment when you have any other in-progress draft either in the Filings to Complete table or in the In-Progress Amendment table.

To amend a previously e-filed statement:

1. Click the statement's **Amend** link in the Filing History table on the Home page. The Amend a Previous Filing page opens.
2. Review the information on the page before proceeding.
3. Click the **Yes - Proceed with Amendment** button. The system creates the amendment and opens the amendment.

View Full Filing History

The "View Full Filing History" link above the E-Filing History table on the right opens the Full Filing History page containing the All Filed Statements table. This table contains all previously paper-filed and e-filed statements. For paper-filed statements, your agency must have previously uploaded the paper-filed statements into your account. If your agency has not uploaded the statements, you will not see them listed in the All Filed Statements table. Contact your agency if you have questions about your paper-filed statements.

NetFile User Home Page

The NetFile User Home page allows filers to change the e-mail address and the password they use to log in to the system.

You open the NetFile User Home page in two ways:

- Click **your name** on the right-hand side of the main menu.
- Click the **Open NetFile User Home Page** link in the **NetFile User Links** menu at the bottom of the side menu.

CHANGE YOUR NETFILE USER PASSWORD

NetFile Users who use a valid, working e-mail address to log in to the system may change the password that they use to log in.



Filers who log in to the system using an “@bogus.zzz” e-mail address cannot use this feature. Contact your agency with questions.

You open the Change Your NetFile Password page in two ways:

- Go to the NetFile User Home page and then click the **Change Your NetFile User Password** link.
- Click the **Change NetFile User Password** link in the **NetFile User Links** menu at the bottom of the side menu.

To change your password:

1. **Current Password** - Enter your current NetFile User password.
2. **New Password** - Enter your new NetFile User password. The new password must be at least 6 characters long. It may contain both upper-case and lower-case letters, numbers and special characters (e.g., !, #, {, *, etc.) Note: NetFile passwords are case-sensitive.
3. **Confirm Password** - Enter your new password again as confirmation. The password you enter in this field must match the password you entered in the New Password field.
4. **Change Password** - Click the Change password button to change your password.



The system displays a password suggestion at the bottom of the page. This password is a suggestion only. It is NOT your current password, nor has the system changed your password to the password it displays. You may choose to use the suggested password or not as you desire.


CHANGE YOUR NETFILE USER E-MAIL ADDRESS

You open the Change Your NetFile E-Mail Address page in two ways:

- Go to the NetFile User Home page and then click the **Change Your NetFile User E-Mail** link.
- Click the **Change NetFile User E-Mail** link in the **NetFile User Links** menu at the bottom of the side menu.

To change your e-mail address:

1. **Current E-Mail Address** - The system displays the current e-mail address of your NetFile User profile. This is the e-mail address you currently use to log in to the NetFile system.
2. **User Password** - Enter your NetFile User password.
3. **New E-Mail Address** - Enter the new e-mail address for your NetFile User profile. This is the new e-mail address you want to use to log in to the NetFile system. See [“Merging NetFile User Profiles” on page 9](#) if the new e-mail address is associated with a different NetFile User profile that you own.
4. **Confirm New E-Mail Address** - Enter the new e-mail address for your NetFile User profile again to confirm.
5. **Save Changes** - Click the Save Changes button to update your NetFile User e-mail address. The system sends a confirmation e-mail to the new e-mail address and the old e-mail address. You must confirm the change from both of the e-mail addresses. Follow the directions in the e-mail message.

 The system sends only one e-mail to users who change their bogus (ending in “@bogus.zzz”) e-mail address to a valid, working e-mail address.

Merging NetFile User Profiles

If you have multiple NetFile User profiles and want to merge them so that you have access to all of your Form 700 Filer accounts (or any other NetFile Filer account type including Campaign, Lobbyist, etc.) with just one e-mail address, you follow the directions listed in [“Change Your NetFile User E-Mail Address” on page 9](#). The *New E-Mail Address* must be associated with a valid NetFile User that you control.

When you save the changes, the system recognizes that the *New E-Mail Address* belongs to a different NetFile User profile than the one you are currently logged in with and opens the *Merge NetFile User Profiles* page. The page lists:

- The *Source E-Mail* address for the NetFile User profile you are currently logged into.
- The *Target E-Mail* address that you want to use as your main NetFile User profile e-mail address and the profile that you want all accounts from the Source Netfile User profile merged into.

You must enter the password for the *Source E-Mail* address along with the password for the *Target E-Mail* address. Click the *Merge NetFile User Profiles* button to merge the Source profile into the Target profile. The system merges the profiles, deletes the Source profile and logs you out. You must then log in with the e-mail address and password for the Target NetFile User profile.

Validation Errors

The system requires you to enter information in all fields that display a red asterisk (*) at the end of the field's label. The system requires other fields when you meet a certain condition. These conditionally required fields display a blue asterisk (*) at the end of the field's label. For example, on the Schedule A-2 if you select the entity type "Business Entity", you must further define the business entity by completing several additional fields.

If you do not enter required or conditionally required information, the system displays a list of validation errors in red text above the form. You must then enter the information in the corresponding fields and save the form.