Welcome to SEI Admin

This tutorial is intended to familiarize you with the SEI Admin system and provides step-by-step instructions for performing many of the most common administrative tasks.

Getting Started

To get started, sign in to your account:

1. Open your web browser and browse to:

   http://nf4.netfile.com/admin/Login.aspx?aid=csj

   The SEI Admin Login page opens.
2. **User** - Enter your user name.
3. **Password** - Enter your password.
4. Click the **Log In** button to enter your account. The SEI Dashboard page opens.

SEI Dashboard

The SEI Dashboard is the home page for the SEI Admin system and contains four menu groups. Each menu group contains links to program features specific to the menu.

Filings Menu

The Filings menu contains links to add filings and to find and edit existing filings.

Filers Menu

The Filers menu contains links to add new filer accounts, to view and edit existing filer accounts and to manage system-generated letters meant to be sent to filers (if this feature is enacted).

Reports Menu

The Reports menu provides links to use the Filing Status Report and to display a report of all contacts made with a filer.

Advanced Menu

The Advanced menu contains links to more advanced features such as changing your account password and adding new contact information.

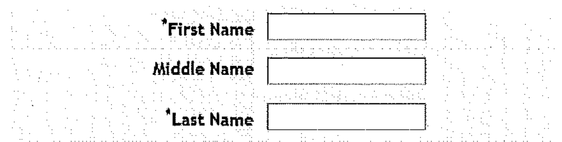
Filer Accounts

You grant access to the SEI E-Filing system by first creating a new filer account.

Adding a New 700 Filer Account

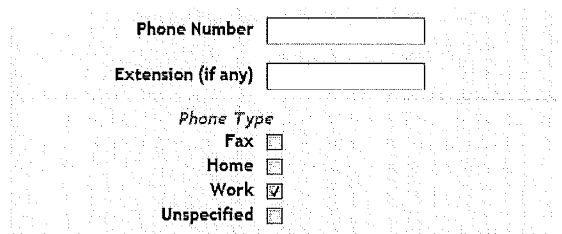
To add a new 700 filer:

1. Select **Add a New 700 Filer** from the Filers menu. The **Add a New Filer** page opens.
2. **First Name** - Enter the new filer's first name.
3. **Middle Name** - (Optional) Enter the new filer's middle name or initial.
4. **Last Name** - Enter the new filer's last name.



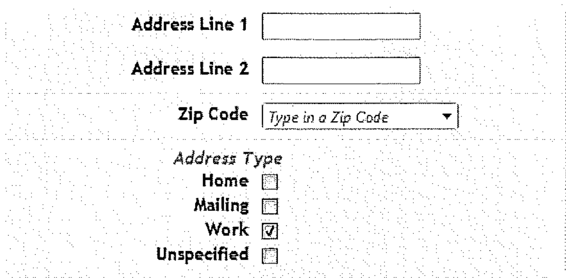
5. **E-mail Address** - Enter the new filer's e-mail address. If the filer does not have an e-mail address yet, click the EMail? button to create a system-generated e-mail address that the filer can use temporarily to access the system.

6. **Phone Number** - (Optional) Enter the new filer's telephone number as a string of numbers (e.g., 9167775566).
7. **Extension (if any)** - (Optional) Enter the new filer's telephone extension.
8. **Phone Type** - (Optional unless you specify a phone number) Select the new filer's phone type.

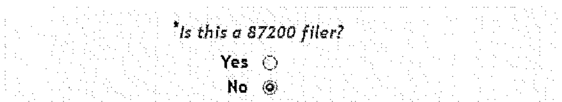


9. **Address Line 1** - (Optional) Enter the new filer's street or post office box address.
10. **Address Line 2** - (Optional) Enter additional address information such as a suite or apartment number.
11. **Zip Code** - (Optional unless you specify an address) Enter the candidate's zip code. As you type the zip code, the drop-down list populates with possible matches including the zip code, city and state. Choose the correct zip code, city and state from the list.
12. **Address Type** - (Optional unless you specify an address) Select the address type. Choose as many options as you deem necessary to fully define the address type.

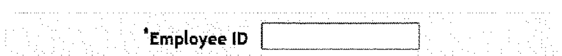
Tip: Although phone and address information is not required, entering this information in the Admin system pre-populates the filer's account with the phone and address, saving the filer from having to enter it when filling out the SEI forms.



13. **Is this an 87200 filer?** - Select Yes if the filer is an 87200 filer or No if the new filer is not an 87200 filer.

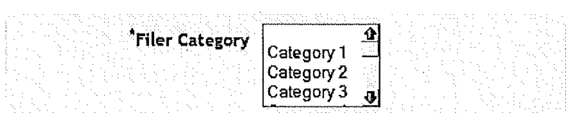


14. **Employee ID** - Enter the filer's employee identification number. This field appears only for those agencies that require the employee's identification number.

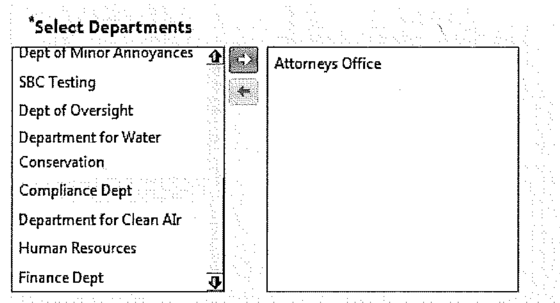


15. **Filer Category** - If your agency allows more than one filer category to be assigned to a filer and you want to select more than one category for the new filer, hold down the 'Ctrl' key on your keyboard while clicking on the filer categories with your mouse pointer. If you want to assign multiple categories within a range e.g. Category 1 through Category 4, hold down the 'Shift' key and click on Category 1 with your mouse pointer and then click on Category 4. Categories 2 and 3 are automatically included in the selection.

Note: If a filer is assigned multiple categories, all will show on the Filing Status Report.

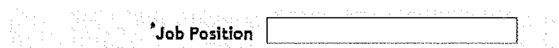


16. **Select Departments** - If your agency allows filers to be assigned to multiple departments, you may select multiple departments from the available departments list and move them to the selected departments list.
    a. **Available Departments** - The available departments display in the selection field on the left. Filing Officers/Liaisons see only those departments for which they are responsible. Full Admins see all departments. Select the department(s) to which the new filer belongs. Click the arrow button pointing to the right to add the department(s) to the Selected Departments list. Hold down your keyboard's Ctrl key to select multiple departments.
    b. **Selected Departments** - To remove departments from the list, select the department and then click the arrow button pointing to the left.



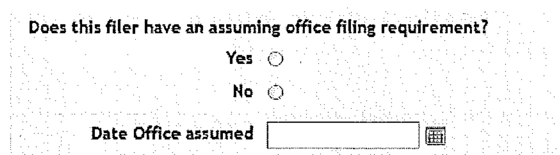
Tip: Double-click on a department to quickly move it from one list to the other.

17. **Job Position** - Enter the new filer's job position.



18. **Does this filer have an assuming office filing requirement?** - If the filer has an assuming office requirement, select Yes. Otherwise, select No.
19. **Date Office assumed** - Enter the date the new filer assumed office in MM/DD/YYYY format or click the pop-up calendar to choose the date.

Note: This creates an Assuming Office Statement requirement. The Assuming Office Statement is due 30 calendar days after the date the filer assumes office.



20. **Submit** - Click the Submit button to add the new filer. The Edit Filer page opens. See "Editing Filer Accounts" on page 3 for information about the Edit Filer page.

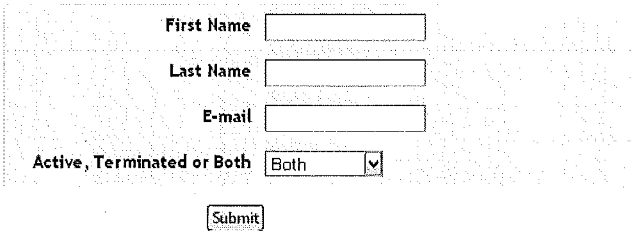
Viewing & Editing Filer Accounts

After adding a new filer account, you will undoubtedly need to view and possibly edit the filer account to verify or alter certain information.

Viewing Filer Accounts

To view filer information, first search for the filer using the search form. From the SEI Dashboard:

1. Click the **View and Edit Filers** link in the **Filers** menu. The View and Edit Filers page opens displaying the form seen below where you may search for filers using any combination of the search fields.



2. **First Name** - Enter the filer's first name.
3. **Last Name** - Enter the filer's last name.
4. **E-mail** - Enter the filer's e-mail address.
5. **Active, Terminated or Both** - Specify the filer type to view by selecting one of the following options from the drop-down list:
   a. **Both** - Select this option to view both active and terminated filers.
   b. **Active** - Select this option to view only active filers.
   c. **Terminated** - Select this option to view only terminated filers.
6. **Submit** - Click the Submit button to initiate the search. The Filers table displays below the search form. Terminated filers show in the table with a tomato colored background.

Tip: To view all filers, leave all fields empty, accept the default filer type of Both and click the Submit button.

Editing Filer Accounts

To edit a filer's information, click the **Edit** link associated with the filer in the Filers table. The Edit Filer page opens displaying details about the filer separated into the following sections and modules:

- **Name Section** - To edit the filer's name, click the **Edit** button. When finished editing, click the **Done** button.
  - **First Name** - Edit the filer's first name as needed.
  - **Middle Name/Initial** - Edit, add or remove the middle name or initial.
  - **Last Name** - Edit the filer's last name as needed.
- **Is this a 87200 filer?** - If the filer is an 87200 filer Yes should be selected. If not, No should be selected.
- **Available and Selected Departments** - Add or remove departments as needed.
- **Job Position** - Alter the filer's job position as needed.
- **Filer Category** - The categories to which the filer has been assigned are highlighted. To change the categories, click on the appropriate categories. Make sure to click the Update Filer button to enter the changes.

Note: If a filer is assigned multiple categories, the system displays all categories on the Filing Status Report. For more information about they Filing Status Report, see "Using the Filing Status Report" on page 8.

- **Employee ID** - Edit the employee ID as needed.
- **User Name** - The system displays the filer's user name in read-only mode. The user name is for internal use only. Filers use their e-mail addresses to log in to the system.
- **User Password**- The user password is hidden to all Filing Officers/Liaisons and Full Admins. It is visible to NetFile Support only.

Note: The only exception to this rule is when the filer has a system-generated, "bogus" e-mail address (e.g., jdoe@bogus.zzz). In this case, the filer can't prompt the system to e-mail the password using the Need to Register? link on the filer log in page, so the password is visible to Full Admins.

- **Required to E-file?** - By default, the system automatically sets this field to "No" when you add a new filer. Click the **Change** button to denote that the filer must e-file.
- **Terminated?** - Through this control you have the ability to terminate or re-activate terminated filers. The current status of a filer is displayed next to the heading. Click the **Change** button to change the filer's status.
- **Contact Details Module** - The Contact Details module displays the filer's address, phone, e-mail and web address only when those contact details have been entered into the system. Use the Contact Details module's controls in the title bar to:
  - **Add Address** - Click this link to add address details.
  - **Add Phone** - Click this link to add phone details.
  - **Add Web Site** - Click this link to add web site details.

    Use the links associated with each contact type to:
    - **Edit** - Click this link to edit the details of the contact type.
    - **Delete** - Click this link to delete the contact type.

Note: Every account must include only one e-mail address. You may neither add an additional e-mail address nor delete the e-mail address. Use the 'Edit' link to change the address.

Add Address | Add Phone | Add Web Site

Edit	Type	Delete
Edit	JTK@enterprise.com	
Edit	Work : (916) 722-8763	Delete
Edit	N/A: 113 K Street Suite 111 Sacramento CA 95840	Delete

- **Notes Module** - The Notes module provides you with the ability to add and edit notes about the filer. To add a note, click the **Add Note** link in the title bar. The note field opens with standard format controls. When done adding your note, click the **Enter Note** button. Note that Filing Officers/Liaisons can add notes, but only and Admin has the ability to edit or delete notes.

Add Note	Existing Notes	
Date	User	Description
01/11/2011	Admin, Full	Need to send a welcome lettte...

Note: Don't confuse this module with the **Contact Logs module** *(detailed below).*

- **Filing History Module** - This module lists all filings entered into the system either by an e-filing event or when a paper filing is added to the system. Each column heading in the module's table provides information about the associated column when you position your mouse cursor over the heading.
  - **Edit** - a link to edit the filing.
  - **Date** - the date the filing was received or added to the system.
  - **Period** - the period covered by the filing.
  - **Form** - the form type.
  - **Type** - the type of filing where,
    - **An** = Annual filing,
    - **As** = Assuming Office,
    - **L** = Leaving Office, and
    - **C** = Candidate statement.
  - **E-filed?** - whether or not the filing was e-filed.
  - **Int** - the internal, non-redacted PDF of the filing.
  - **Ext** - the external, redacted (address information removed) PDF of the filing.
  - **Filing Sequence** - displays "Original" for original filings and a numbered sequence starting at "001" for amendments to original filings.
  - **Request Amendment** - a link to the Filing Review page where you specify whether or not the filing requires an amendment.
  - **Add Fine** - a link to the Add Fine window where you add a fine associated with the filing.
  - **Delete** - a link to delete the filing.

Note: The 'Delete' link is available to Full Admins only and they may delete only paper filings.

Click the Add Filing link in the module's title bar to add a paper filing.

- **Status History Module** - The Status History module contains information about the current and past status of a filer's account. To change the current status, click the **Change Status** link in the module's title bar. The system exposes the **Status** and **Status Date** fields. Select a new status and alter the status date if necessary. When you have completed your status update, click the **Submit** button.

Status History	Change Status
Date	Status
01/05/2011	ACTIVE

Note: Use the **Terminated?** *control to terminate or re-activate a filer. Use the Status History module's 'De-activated' status to suspend the filer's account.*

- **Contact Logs Module** - When a contact is recorded using the **New Contacts** feature under the **Advanced** menu on the **SEI Dashboard**, the Contact Logs module lists those contacts.

Contact Logs				
View	Date	Name	Description	Delete
View	01/10/2011	Kirk, James	James stopped in to provide...	Delete

- **Active Individual Deadlines Module** - This module lists three types of individual deadlines:
  - Assuming Office Deadlines
  - Leaving Office Deadlines
  - Candidate Statement Deadlines

Active Individual Deadlines					Add Individual Deadline	
Edit	Deadline	Actual Date	Type	Form	Fulfilled?	Exclude
Edit	2/14/2011	01/15/2011	Leaving Office	fppc700_2011	False	Exclude
Edit	2/2/2011	01/03/2011	Assuming Office	fppc700_2011	False	Exclude

Using the links on the module you have the ability to edit an individual deadline, exclude the deadline and add a new individual deadline. To add a deadline, click the Add Individual Deadline link in the module's title bar. The Add Individual Requirement window opens. Enter the date in the appropriate section to add one or more of the three types of deadlines.

The Actual Date is the date the filer is actually assuming or leaving office based on the assuming or leaving office date.

The system uses the Actual Date to determine the Deadline date by adding 30 calendar days to the Actual date. If the resulting date falls on a weekend, the system sets the Deadline date to the next available business day.

Note: For deadlines before 1/1/2011, the 'Actual Date' column will always be displayed as '01/01/0001' and the 'Fulfilled?' column will always be displayed as 'False'.

- **Active Annual Deadlines Module** - This module contains the annual filing deadlines for which the filer is required to file. To remove a deadline, click its associated Exclude link. The system removes the deadline and places it in the **Excluded Annual Deadlines** module.

Active Annual Deadlines			
Deadline	Type	Form	Exclude
4/1/2011	Annual	fppc700_2011	Exclude

Excluded Annual Deadlines Module - The deadlines displayed in this module are the annual deadlines for which the filer is not required to file.Click a deadline's Include link to add the deadline to the **Active Annual Deadlines** module.

Excluded Annual Deadlines

Deadline	Type	Form	Include
4/1/2011	Annual	fppc700_2011	Include
4/1/2010	Annual	fppc700_2010	Include
4/1/2009	Sunshine Declaration Annual	sf_sunshine_2009	Include
2/5/2009	Annual	fppc700_2009	Include
3/13/2008	Annual	fppc700_2008	Include

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- **Fines Module** - The Fines module displays fines levied against a filer via the **Filing History** module. The Fines module allows you to view a filer's fine information including,
  - the filing which incurred the fine,
  - the fine's due date,
  - the fine's amount,
  - the number of payments received on the fine, and
  - the total amount paid per fine.

Creating an Assuming Office Requirement

To add an assuming office requirement by editing the filer's account:

1. Click the View and Edit Filers link under the Filers menu on the SEI Dashboard page. The View and Edit Filers page opens.
2. Enter the filer's first and last names on the search form and click the Submit button. The Filers table displays.
3. Click the Edit link associated with the filer. The Edit Filer page opens.
4. Scroll down the page until you see the Active Individual Deadlines module on the left side of the page.
5. Click the **Add Individual Deadline** link on the right side of the module's title bar. The Add Individual Requirement window opens.
6. The first section in the window is where you add the **Date assumed office**. Enter the date in MM/DD/YYYY format (e.g., 12/01/2010).
7. Click the **Add Date** button to add the new Individual Requirement.
8. Click the **Close** button (at the very bottom of the window) or the close window icon (the 'X') at the top right of the window to enter the Active Individual Deadline. The system updates the Edit Filer page and displays the new deadline in the Active Individual Deadline module.

Creating a Leaving Office Requirement

1. Click the **View and Edit Filers** link under the Filers menu on the SEI Dashboard page. The View and Edit Filers page opens.
2. Enter the filer's first and last names on the search form and click the Submit button. The Filers table displays.
3. Click the Edit link associated with the filer. The Edit Filer page opens.
4. Scroll down the page until you see the Active Individual Deadlines module on the left side of the page.
5. Click the **Add Individual Deadline** link on the right side of the module's title bar. The Add Individual Requirement window opens.
6. The second section in the window is where you add the **Date left office**. Enter the date in MM/DD/YYYY format (e.g., 12/01/2010).
7. Click the **Add Date** button to add the new Individual Requirement.
8. Click the **Close** button (at the very bottom of the window) or the close window icon (the 'X') at the top right of the window to enter the Active Individual Deadline. The system updates the Edit Filer page and displays the new deadline in the Active Individual Deadline module.

Creating a Candidate Statement Requirement

1. Click the **View and Edit Filers** link under the Filers menu on the SEI Dashboard page. The View and Edit Filers page opens.
2. Enter the filer's first and last names on the search form and click the Submit button. The Filers table displays.
3. Click the Edit link associated with the filer. The Edit Filer page opens.
4. Scroll down the page until you see the Active Individual Deadlines module on the left side of the page.
5. Click the **Add Individual Deadline** link on the right side of the module's title bar. The Add Individual Requirement window opens.
6. The first section in the window is where you add the **Candidate statement Due Date**. Enter the date in MM/DD/YYYY format (e.g., 12/01/2010).
7. Click the **Add Date** button to add the new Individual Requirement.
8. Click the **Close** button (at the very bottom of the window) or the close window icon (the 'X') at the top right of the window to enter the Active Individual Deadline. The system updates the Edit Filer page and displays the new deadline in the Active Individual Deadline module.

Managing Letters (if Letters are Enabled)

The system generates letters automatically based on certain events such as adding a new filer, assessing a fine, and requiring amendments. To access the Letters page, click the Letters link in the Filer menu on the SEI Dashboard.

The Letters page contains the following areas:

Select Letter Type

This drop-down list displays the number of letters of each type that are available to run. Select a letter type to view the letters in of that type that are available to run the Letters Queue.

Letters Queue

By default, the Letters Queue displays all letters of all types that are available to run.
The Letters Queue displays 15 letters per page. Use the page controls at the bottom of the Letters Queue to move to a different page or to change the number of letters to view per page.
Each entry in the Letters Queue lists the letter type and the name of the individual for whom the system generated the letter.
Click the Preview link for a letter to view the PDF document.
Use the Delete link to delete a letter.

Caution: The Delete feature permanently deletes the letter.

You specify letters on the Letters Queue to add to the Print Queue by selecting the Print check box for each letter (the letter's row turn green). Use the Select All check box to select all letters currently in the Letters Queue. Click the Add to Print Queue button just below the Letters Queue to send the batch of letters you selected to the Print Queue.

Print Queue

The Print Queue displays batches of letters that the system has processed and made available for you to download and print on your printer.
The Batch Activity provides you with information about when the system completed processing the batch as well as the number of pages in the batch.
To download the batch of PDF files, click the View link in the Download column.
To return all the letters in a batch to the Letters Queue, click the Return to Letters Queue link.
To delete a batch, click the batch's Delete link.

Caution: The Delete feature permanently deletes the batch.

Filings

Recording Filings Received

To record a paper filing, click the **Record Filings Received** link under the **Filings** menu on the **SEI Dashboard**. There are four options to record a received paper filing:

- Verifying Receipt of an E-filed Document
- Inputting a Manual Filing of an Annual Statement
- Inputting a Manual Filing of a Non-Annual or Combined Statement
- Recording an Amendment

Verifying Receipt of an E-filed Document

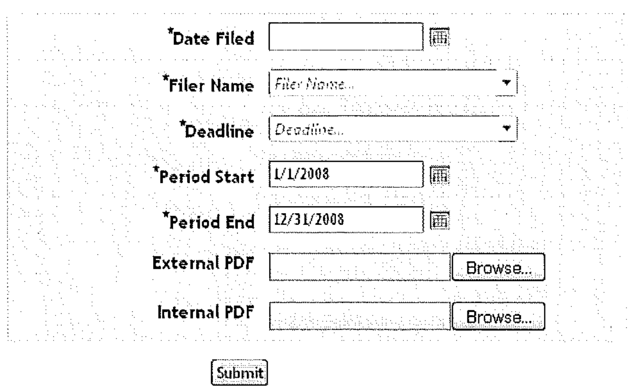
If the paper filing was created using the e-filing system, choose Verify Receipt of E-Filed Document. To determine if the printed document was created using the e-filing system, there should be an eight-digit document ID found just below the black box in the top left corner that reads California Form 700.

1. **Receipt** - Specify the date the filings were received (defaults to Today's date).
2. **Filing IDs** - Enter the printed Filing IDs you wish to record in the box, with one ID per line. Press your keyboard's Enter key to move down a line.
3. **Submit** - Click the Submit button to record the filings.

The recorded status of the Filing ID displays next to the ID number. *Successfully recorded* means that the filing has now been wet filed. *Already recorded* means that the filing was already wet filed in the system. *Not found* means that the system does not recognize the number as valid (e.g. too many numbers were added, numbers were added incorrectly). If the number was entered incorrectly, edit the ID number and click the Submit button again.

Inputting a Manual Filing of an Annual Statement

If the paper filing was not created using the e-filing system, choose **Input Manual Filing of an Annual statement.**
The annual statement is all standard, non-combined statements due on April 1st. Statements that were produced by downloading a PDF file from the FPPC, or any document filled in manually falls into this category.



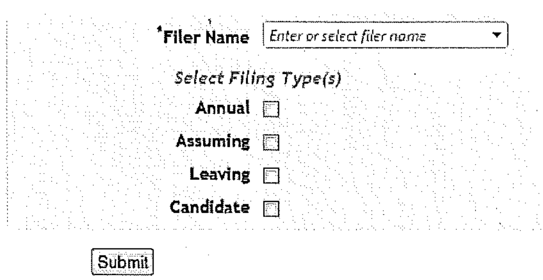
To input a manual filing of an Annual Statement enter:

1. **Date Filed** - Enter the date in MM/DD/YYYY format or use the date chooser icon to choose the date.
2. **Filer Name** - Start typing the filer's name. If they are in the system, their name will pop up. Click on the name to continue.
3. **Deadline** - Choose the filing deadline associated with this filing from the drop down box.

4. **Period Start Date** - Enter the date of the first day of the filing period in MM/DD/YYYY format or use the pop-up calendar to choose the date.
5. **Period End Date** - Enter the date of the last day of the filing period in MM/DD/YYYY format or use the pop-up calendar to choose the date.
6. **External PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Redacted version of the paper filing, that is to say, the copy that does not have signatures or address information shown. Click on the Browse button to select the PDF of the paper filing to upload.
7. **Internal PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Non-Redacted version of the paper filing, that is to say, the copy that does have signatures and address information shown. Click on the Browse button to select the PDF of the paper filing to upload.
8. **Submit** - Click the Submit button to enter filing.

Inputting a Manual Filing of a Non-Annual or Combined Statement

If the paper filing was not created using the e-filing system, and has a non-standard deadline, choose Input Manual Filing of a Non-Annual or Combined statement. The non-annual or combined statements include assuming, leaving, or candidate statements. It could also include a combined statement, such as an Annual and a Leaving. Statements that were produced by downloading a PDF file from the FPPC, or any document filled in manually falls into this category.



To input a manual filing of a non-annual or combined statement enter:

1. **Filer Name** - Start typing the filer's name. If they are in the system, their name will pop up. Click on the name to continue.
2. **Filing Type** - Select as many of the four accepted filing types as necessary to fully define this filing:
   - **Annual** - A yearly filing.
   - **Assuming** - An assuming office statement.
   - **Leaving** - A leaving office statement.
   - **Candidate** - A candidate statement.
3. **Submit** - Click the Submit button to proceed to the **Record Filings** page.
4. **Date Filed** - Enter the date in MM/DD/YYYY format or use the pop-up calendar to choose the date.
5. **Filer Name** - Start typing the filer's name. If they are in the system, their name will pop up. Click on the name to continue.
6. **Deadline** - Choose the filing deadline associated with this filing from the drop-down list.
7. **Period Start Date** - Enter the date of the first day of the filing period in MM/DD/YYYY format or use the pop-up calendar to choose the date.
8. **Period End Date** - Enter the date of the last day of the filing period in MM/DD/YYYY format or use the pop-up calendar to choose the date.
9. **External PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Redacted version of the paper filing, that is to say, the copy that does not have signatures or address information shown. Click on the Browse button to select the PDF of the paper filing to upload.
10. **Internal PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Non-Redacted version of the paper filing, that is to say, the copy that does have signatures and address information shown. Click on the Browse button to select the PDF of the paper filing to upload.
11. **Submit** - Once you have all the information entered, click the Submit button to enter the filing.

Recording an Amendment

If the paper filing is an amendment of any type of document, either e-filed or paper filed, choose Amendment.
To enter an amendment, enter the following information:

1. **Filer Name** - Start typing the filer's name. If they are in the system, their name will pop up. Click on the name to continue.
2. **Filing Date** - Enter the date of this filing by choosing it from the date chooser or enter in the date in MM/DD/YYYY format.
3. **Is this a Partial Filing covering only the changed items?** - If this filing contains only the page(s) changed and does NOT contain the entire filing, select Yes.
4. **External PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Redacted version of the paper filing, that is to say, the copy that does not have signatures or address

information shown. Click on the Browse button to select the PDF of the paper filing to upload.

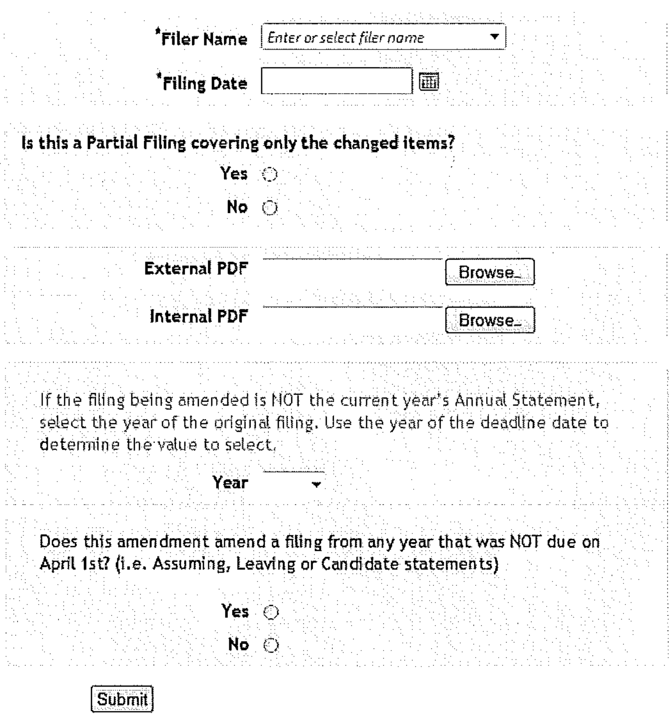
5. **Internal PDF** - (Optional) You may upload a scanned copy of the paper filing here (the scanned copy must be in PDF format). This is for the Non-Redacted version of the paper filing, that is to say, the copy that does have signatures and address information shown. Click on the Browse button to select the PDF of the paper filing to upload.
6. **Year** - If the filing being amended is not the current year's Annual Statement, Select the year of the original filing from the drop down box.

Note: If this filing amends the current year's Annual Statement, do not select a year.

7. **Does this amendment amend a filing from any year that was *not* due on April 1st?** - Select Yes if the filing being amended is for anything other than a complete Annual Statement, such as an Assuming Office statement, Leaving Office statement or Candidate statement.

Note: If you select Yes in answer to the question in step 7, the system moves on to another page when you click the Submit button so that you can choose the filing to attach this amendment to.

8. **Submit** - Once you have all the information entered, click the Submit button to enter filing.



Viewing & Editing Existing Filings

Search for Filings Using a Date Range

To search for filings using a date range:

1. **From Date** - Enter the date of the first day of the date range in the From Date field.
2. **To Date** - Enter the date of the last day of the date range in the To Date field.
3. **Search** - Click the Search button to begin the search.

Search for Filings by Filer Name

To search for filings by a specific filer, start typing the filer's name in the auto-complete list. If the filer is in the system, their name will come up. Select the name from the auto-complete list and click the Search button.

The results of your search will be shown as a grid at the bottom of the screen. From the grid you can delete or edit a filing.

Editing Filings

To edit a series 700 filing:

1. Click the **Edit** link next to the filing you want to edit. The **Edit Filing** page opens.
2. **View Activity** - Click the Activity button to view the
3. **Filer Name** - View the filer name in read-only mode.
4. **Date of Filing** - Edit the filing date using the pop-up calendar.
5. **Deadline** - Change the deadline by selecting a new deadline from the drop-down list.
6. **Period Start Date** - Change the date of the first day of the filing period using the pop-up calendar.
7. **Period End Date** - Change the date of the last day of the filing period using the pop-up calendar.
8. **Is this a leaving office statement?** -
9. **External PDF** -
10. **Internal PDF** -
11. **External Reference #** -
12. Amendments to this filing - This section appears only when and amendment to this filing has been entered.
13. **Update** -
14. **Needs Amendment** -

Reports

Using the Filing Status Report

Use the Filing Status Report to view information about the status of filings in your department(s).

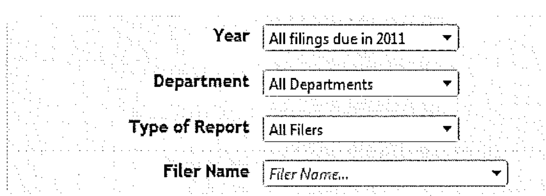
The Filing Status Report search form displayed for your agency depends on your agency settings. The system offers a standard search form and an advanced search for.

Access the Filing Status Report search form from the **SEI Dashboard**, click the **Filing Status Report** link under the **Reports** menu. The **Filing Status Report page** opens.

Standard Search

To create a Filing Status Report using the Standard Search:

1. **Year** - Select the report year (e.g., All filings due in 2011).
2. **Department** - Select the department from which you want to view filings. The default value is **All Departments**.
3. **Type of Report** - Select the type of filers for the report. The default value is **All Filers**. You may also select **Non-Filers** (those who were supposed to file but have not filed) and **Successful Filers** (those who have successfully filed).
4. **Filer Name** - Enter the filer's name with the last name first. The auto-complete completion list will fill with possible matches. Continue typing the name until you see it on the list and then click the name to select it.
5. **Search** - Click the **Search** button to initiate your search.
6. **Clear** - Use the **Clear** button to reset the form to its default state.
7. **Export** - Use the Export button to export the search results to an Excel file.



Note: Leave all fields in their default state to create a report for all filers from all departments in the default year.

Viewing & Editing the Contact History

To view the Contact History for a filer:

1. Click the **Contact History** link in the Reports menu on the SEI Dashboard page. The Contact History page opens. Displaying the Contact History search form.
2. **Filer** - Begin typing the filer's name and then select the name from the auto-complete list.
3. **Start Date** - Enter a start date to create the beginning date in a range in which to search for contacts.
4. **End Date** - Enter an end date to the range in which to search for contacts.
5. **Submit** - Click the Submit button to initiate your search. The Contact History page refreshes to display the search results in a table below the search form.

Edit a Contact

After searching for the contact you want to edit using the instruction above, click the **Edit** link for the contact. The Edit Contact page opens where you may edit any of the following information:

- Date
- Method
- Filer
- Third-Party
- Notes.

Click the **Submit** button to save your changes to the contact.

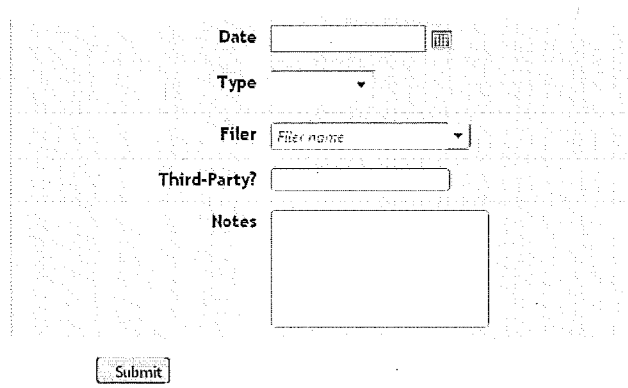
Advanced Functions

The SEI Admin system provides several links for performing advanced system functions.

Recording New Contacts

Use the Contact Log to log communication to and from filers. To enter a new contact:

1. Click the New Contacts link in the Advanced menu on the SEI Dashboard page. The Add Contact page opens displaying the form seen below.

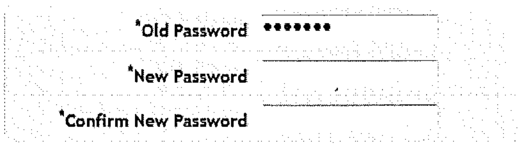


2. **Date** - Enter the date of the contact in MM/DD/YYYY format or use the pop-up calendar to choose the date.
3. **Type** - Select the contact type from the drop down list.
4. **Filer** - Select the filer for this contact record by choosing the filer from the auto-complete list.
5. **Third-Party?** - If this contact was with another individual or organization regarding the filer (such as with the FPPC), enter the name of the third-party.
6. **Notes** - Enter a brief description of the contact made.
7. Click the **Submit** button to enter the contact.

Changing Your Staff Password

Use this feature to change your account password. To change your password:

1. Click the **Change Staff Password** link under the **Advanced** menu on the **SEI Dashboard** page. The **Change your Password** page opens.



2. **Old Password** - Enter your current password.
3. **New Password** - Enter a new password. Passwords are not case sensitive, but must be at least six characters in length and must contain at least one number.
4. **Confirm New Password** - Enter your new password again to confirm.
5. **Submit** - Click the Submit button to change your password.