

**NetFile SEI System**  
**E-Filer Users Guide**

Filing Form 700

Version: 1

Last Updated: 2/25/2008



## Important Tips

- You have the option to enter information for each of the FPPC Form 700 schedules or bypass the schedules completely. If you skip over a schedule you have an opportunity to add it at the end of the data entry process.
- At any point during data entry you can skip to the Review Page by clicking on **Review Page** which is at the top of most pages.
- When you have completed entering information for all the schedules, you have the opportunity to review your entries and print a draft paper copy of the filing. You can correct any errors before e-filing or printing a paper copy of your filing.
- You must click **Enter** to save information entered on a page. If there is data entered on a schedule and you attempt to proceed to the next page without clicking **Enter** you will receive an error message that requires you to click **Enter** to save the data or delete the data from the schedule.
- You can exit the system at any time and return later to complete your filing. Any previously entered data that has been saved will be there and you will not have to re-enter it.

## Login

To start using the SEI E-Filing system:

- Contact your Filing Authority to find out how to access the Filer application
- Select which type of user you are:
  - New user with a password
  - New user without a password (need to Register)
  - Existing user who has forgotten their password

### 1) New user with password

**Login for Existing Users**

Email:

Password:

[Lost Password?](#) | [Need To Register?](#)

Click **Login** to continue

Enter email address and password. Email address must be the one on file with your filing official

**Login**



**Begin SEI (go to Page 5)**

### 2) New user without password

**Login for Existing Users**

Email:

Password:

[Lost Password?](#) | [Need To Register?](#)

If you have never used the system before and do not have a password, click **Need to Register**. **Register to use SEI** section appears

---

**Register to use SEI**

Enter the e-mail address on file with your filing officer.

Email:

Enter your email address on file with your filing official and click **Register**. An email containing your password will be sent to your email address. Type this password along with your email address on the **Login for Existing Users** page and click **Login**

**Login**



**Begin SEI (go to Page 5)**

### 3) User - lost password

The screenshot displays two sections of the login interface:

- Login for Existing Users:** Contains fields for 'Email:' and 'Password:', a 'Login' button, and a link for 'Lost Password? Need It?'. A callout box points to the 'Lost Password?' link with the text: "If you cannot remember your password click **Lost Password**. **Lost Password** section appears".
- Lost Password:** Contains the instruction "Enter the e-mail address on file with your filing officer.", an 'Email:' field, and a 'Submit' button. A callout box points to the 'Submit' button with the text: "Enter your email address on file with your filing officer and click **Submit**. An email containing your new password will be sent to your email address. Type this password along with your email address on the **Login for Existing Users** page and click **Login**".

Login



Begin SEI (go to Page 5)

## Begin SEI

### 1) New User (not e-filed using this system before)

**Begin SEI**

The system indicates you need to file an Annual statement.

Click "Next" to get started.

NOTE: If you have successfully e-filed from this system before, the data from your last e-filing is pre-populated in the current form to be completed. Please review the information and edit accordingly. Changes to your data made by your Filing Official in their records are not reflected in the current form you are completing.

[Next](#) Click **Next** to continue

As a new e-filer to the system this note does not apply

Confirms the requirement you are expected to file. If you are filing an Assuming, Leaving or Candidate statement the message will reflect this. If the requirement is not what you are expecting to file, contact your Filing Official



Cover Page – Filer Information (go to Page 7)

### 2) Existing User (successfully e-filed using this system)

**Begin SEI**

The system indicates you need to file an Annual statement.

Click "Next" to get started.

NOTE: If you have successfully e-filed from this system before, the data from your last e-filing is pre-populated in the current form to be completed. Please review the information and edit accordingly. Changes to your data made by your Filing Official in their records are not reflected in the current form you are completing.

[Next](#) Click **Next** to continue

Review prepopulated fields and Edit dataviews (at bottom of screen when applicable) for accuracy

Confirms the requirement you are expected to file. If you are filing an Assuming, Leaving or Candidate statement the message will reflect this. If the requirement is not what you are expecting to file, contact your filing official

Your Successful Filings:  
Hartley, Hal - FPPC 700 - 3/26/2007

PDFs of previous successful filings are listed and can be reviewed prior to completing the current form by clicking on the link



Cover Page – Filer Information (go to Page 7)

### 3) Existing User (work in progress)

**Work In Progress**  
You have a work in progress 700 document.  
To continue working on your document, click "Next".

[Next](#)

**Your Successful Filings:**  
[Target, James - FPPC 700 - 10/29/2007](#)  
[Target, James - FPPC 700 - 10/29/2007 - -1](#)

This screen appears only if user has been previously logged into the system but exited before e-filing their current requirement. Clicking **Next** takes user to the review page from where they can select the schedules they need to edit or complete.

PDFs of previous successful filings are listed (if applicable) and can be reviewed prior to continuing by clicking on the appropriate link(s)

**Next**  
↓  
[Review Page] (go to Page 27)

### 4) Existing User (no outstanding filing requirements)

**All filing requirements completed**  
All of your current filing requirements in the system have been completed. Please contact your filing authority if you feel this is in error.

**Your Successful Filings:**  
[Bartles, Tom - FPPC 700 - 2/8/2008](#)

As all current filing requirements in the NetFile system have been completed you are not able to continue further. You are able to review any previous successful filings by clicking on the appropriate PDF link

## Cover Page

## Cover Page - Filer Information

**Review Page**  
Cover Page - Filer Information

1. Enter your name, mailing address, and daytime telephone number in the spaces provided. Because the Form 700 is a document available for public review, you may list your business/office address instead of your home address.
2. Click "Enter" to add the information and continue to next section.

**Cover Page Information**

**First Name:**

**Middle Name:**

**Last Name:**

**Address Line 1:**

**Address Line 2:**

**City:**

**State:**  **Zip Code:**

**Phone:**

**Fax:**

**Email:**

Review filer information that was entered on the Admin side of the program. Make changes as necessary. Click **Enter** to update and save the information.



## Cover Page - Office

**Review Page**  
Cover Page - Office

1. Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm name.
2. Indicate the name of your division, board, or district, if applicable.
3. Enter your position title.
4. Click "Enter" to add the information. Click "Next Section" to skip entering additional information and continue to the next form section.  
(The "Next Section" button will appear after entering at least one entry.)

**Update Office, Agency, or Court information**

**Name of Office, Agency, or Court:**

**Division, Board, District, if applicable:**

**Your Position:**

Type information. Click **Enter** to update and save the information.



Review Page | Cover Page - Office

1. Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm name.
2. Indicate the name of your division, board, or district, if applicable.
3. Enter your position title.
4. Click "Enter" to add the information. Click "Next Section" to skip entering additional information and continue to the next form section.  
(The "Next Section" button will appear after entering at least one entry.)

**Update Office, Agency, or Court information**

Name of Office, Agency, or Court:

Division, Board, District, if applicable:

Your Position:

If filing for multiple positions, enter additional information and click **Enter** to update the info in the system. Repeat to add additional positions.

If not filing for additional positions or you have finished entering additional positions, click **Next Section** to move to Cover Page Part 2: Jurisdiction of Office

Office, Agency, or Court information already entered in system. Click **Edit** to change information or **Delete** to delete it.

Name	Division	Position	Edit	Delete
Weatherology	Resources	Manager	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Next Section



Cover Page - Jurisdiction of Office

Review Page | Cover Page - Jurisdiction Of Office

For detailed information regarding what your jurisdiction may be, see the side bar or contact your filing officer.

1. If your jurisdiction is a State jurisdiction, check the "State Jurisdiction" check box.
2. For all others, enter the jurisdiction of your filing in the appropriate locations.
3. Click "Enter" to enter information and continue to next section.

**Jurisdiction**

Yes, My Jurisdiction is 'STATE'.

County of:

City of:

Multi-County:

Other:

Type information required and click **Enter** to update and save the information

Enter



## Cover Page - Type of Statement

[Review Page](#)

Cover Page - Statement Type

The period covered by a statement is determined by the type of statement you are filing. Your annual statement is used for reporting the previous year's economic interest. Economic interests for your annual filing covering January 1, 2007, through December 31, 2007, will be disclosed on your statement filed in 2008.

1. Choose a statement type.
2. Enter the period this filing covers.
3. Click "Enter" to enter the information and continue to Schedule

**Statement Type**

Choose all that apply:

Annual    Assuming Office    Leaving Office    Candidate

**Period Statement Covers**

Start and end dates for the Annual statement

1/1/2007   12/31/2007

[Enter](#)

Click **Enter** to update and save the information

The statement type defaults to the type of statement indicated on the 'Begin SEI' page. If a combined statement is to be filed more than one box will be checked

Dates default according to the statement type. If the statement type is assuming or leaving this section shows the assuming office date or the leaving office date. If it is necessary to change the dates use the calendar or type in MM/DD/YYYY format

**Enter**



[Schedule A-1: Investments]

# Schedule A-1 Investments (Stocks, Bonds, and Other Interests)

Review Page |  
Schedule A-1 : INVESTMENTS

Use Schedule A-1 to report ownership of *less than* 10% (for example, stock).  
"Investment" means a financial interest in any business entity which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period.  
(Use Schedule A-2 to report ownership of 10% or greater (for example, a sole proprietorship))

Question

Click "Yes" to record A-1 information

Click **Yes** to enter Schedule A-1 information

Click **No** to go directly to Schedule A-2:Investments and not enter Schedule A-1:Investments information

YES NO

Yes  
↓

No  
↓

Schedule A-2: Investments

Review Page |  
Schedule A-1

Add your Schedule A-1 transaction

Name Of Business Entity:  
[Text Box]

General Description of Business Activity:  
[Text Box]

Fair Market Value:  
[Dropdown]

Nature of Investment:  
 Stock  Other

If the Nature of Investment is "Other", please describe below:  
[Text Box]

If Applicable, list date:  
Date Acquired:  
[Calendar]

Date Disposed:  
[Calendar]

Enter Next Section

Type required info and click **Enter** to update and save the information

If no Schedule A-1 entries are to be entered click **Next Section** to go directly to Schedule A-2

Enter  
↓

**Add your Schedule A-1 transaction**

**Name Of Business Entity:**

**General Description of Business Activity:**

**Fair Market Value:**

**Nature of Investment:**  
 Stock  Other

**If the Nature of Investment is "Other", please describe below:**

**If Applicable, list date:**  
**Date Acquired:**

**Date Disposed:**

**Buttons:**

If filing additional Schedule A-1 transactions, enter the information and click **Enter** to update and save the info. Repeat to add more Schedule A-1 transactions.

If you are not entering additional Schedule A-1 transactions, click **Next Section** to move to Schedule A-2: Investments.

Schedule A-1 transactions already entered in the system. Click **Edit** to change information or **Delete** to delete it.

Name	Amount	Type	Edit	Delete
Netfile	\$10,000.00	stock	<a href="#">Edit</a>	<a href="#">Delete</a>

**Next Section**



[Schedule A-2: Investments, Income and Assets of Business Entities/Trusts]

# Schedule A-2

## Investments, Income and Assets of Business Entities/Trusts

**Review Page** | **Schedule A-2 : INVESTMENTS**

Use Schedule A-2 to report investments in a business entity or trust (including a living trust), in which you, your spouse or registered domestic partner, or your dependent children had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the interest was \$2,000 or more during the reporting period.

**Question**

Click "Yes" to record any Schedule A-2 information. Click "No" to go directly to Schedule B.

Click **Yes** to enter Schedule A-2: Investments information

Click **No** to go directly to Schedule B and not enter Schedule A-2: Investments information

**YES** **NO**

Yes  
↓

No  
↓

Schedule B: Interests in Real Property



OR



### Schedule A-2: Trust Entity Part 1 & 2

### Schedule A-2: Business Entity Part 1 & 2

**Add Schedule A-2 transaction**

**Part 1: select Trust**

Is this a Trust or a Business Entity?  
 Trust  Business Entity

Name: \_\_\_\_\_

Address Line 1: \_\_\_\_\_

Address Line 2: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

General Description of Business Activity: \_\_\_\_\_

Fair Market Value:  
 \$2,000 - \$10,000  \$10,001 - \$100,000  \$100,001 - \$1,000,000  Over \$1,000,000

If applicable, list date:  
 Date Acquired: \_\_\_\_\_

Date Disposed: \_\_\_\_\_

Nature of Investment:  
 Sole Proprietorship  Partnership

Describe Below:  
 Part 2: Identify the gross income received

Part 2: Identify the gross income received: \_\_\_\_\_

Code: \_\_\_\_\_

If no Schedule A-2 entries are to be entered click **Next Section** to go directly to Schedule B

Part 2: Identify the gross income received: \_\_\_\_\_

Click Enter to update the info and continue to Part 3

**Enter** **Next Section**

**Add Schedule A-2 transaction**

**Part 1: select Business Entity**

Is this a Trust or a Business Entity?  
 Trust  Business Entity

Name: \_\_\_\_\_

Address Line 1: \_\_\_\_\_

Address Line 2: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

General Description of Business Activity: \_\_\_\_\_

Fair Market Value:  
 \$2,000 - \$10,000  \$10,001 - \$100,000  \$100,001 - \$1,000,000  Over \$1,000,000

If applicable, list date:  
 Date Acquired: \_\_\_\_\_

Date Disposed: \_\_\_\_\_

Nature of Investment:  
 Sole Proprietorship  Partnership

Describe Below:  
 Part 2: Identify the gross income received

Part 2: Identify the gross income received: \_\_\_\_\_

Code: \_\_\_\_\_

If no Schedule A-2 entries are to be entered click **Next Section** to go directly to Schedule B

Part 2: Identify the gross income received: \_\_\_\_\_

Click Enter to update the info and continue to Part 3

**Enter** **Next Section**

Enter  
↓

**Part 3**

**Income Source Name**

» Part 3  
Enter Source Name:

If no Income Source Name required click **Go to Part 4**

Type Source name if required. Click **Enter** to update and save the info.

Add additional Source Names if required and click **Enter** to update and save the info. Repeat to add more Income Source Names.

If you are not entering additional Source Names click **Go to Part 4**.

Income Source Names already entered in the system. Click **Edit** to change or **Delete** to delete the info.

Income Source Name	Edit	Delete
John Smith	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

**Enter**

**Enter**

**Part 4**  
**Select Investment or Real Property**

**Investment**

**Add Schedule A-2 Part 4**

» Part 4  
Specify the type of transaction:

Investment  Real Property

Business Name:

Business Activity Description:

Fair Market Value:  
 \$2,000 - \$10,000  \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  Over \$1,000,000

If applicable, list date:  
 Date Acquired:   
 Date Disposed:

Nature of Investment:  
 If you do not want to enter Part 4 info but want to move to Schedule B click **Next Section**  
 If you do not want to enter Part 4 info but want to add a new A-2 Schedule click **New A2**

**Enter**

**Real Property**

**Add Schedule A-2 Part 4**

» Part 4  
Specify the type of transaction:

Investment  Real Property

Enter either the assessor's parcel number -or- the street address of the property:  
 Assessor's Parcel Number:

Street Address of the Property:  
 Address 1:   
 Address 2:

Enter the city or state or zip code for all real property assets:  
 City:   
 State:  Zip Code:

Fair Market Value:  
 \$2,000 - \$10,000  \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  Over \$1,000,000

If applicable, list date:  
 Date Acquired:   
 Date Disposed:

Nature of Investment:  
 Click **Enter** to update and save the info entered  
 If you do not want to enter Part 4 info but want to move to Schedule B click **Next Section**  
 If you do not want to enter Part 4 info but want to add a new A-2 Schedule click **New A2**

**Enter**

**Add Schedule A-2 Part 4**

» **Part 4**

**Specify the type of transaction:**  
 Investment  Real Property

**Fair Market Value:**  
 \$2,000 - \$10,000  \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  Over \$1,000,000

**If applicable, list date:**  
**Date Acquired:**    
**Date Disposed:**

**Nature of Investment:**  
 Prop  Leas  Othe

**Buttons:**

Name		
Netfile	<a href="#">Edit</a>	<a href="#">Delete</a>
	<a href="#">Edit</a>	<a href="#">Delete</a>

If necessary, continue to add investments or interests in real property held by the trust or business entity. Click **Enter** to update and save the info.

If you do not want to enter additional Part 4 info but want to move to Schedule B click **Next Section**.

If you do not want to enter additional Part 4 info but want to add a new A-2 Schedule click **New A2**.

Previous transactions entered. Click **Edit** to change or **Delete** to delete the info.

**Enter**  
↓

[Schedule B: Interests in Real Property]

# Schedule B Interests in Real Property

**Question**

**Do you need to record any Schedule B transactions?**

Click **"Yes"** to enter Schedule B information. Click **"No"** to continue.

Click **Yes** to enter Schedule B information. **YES**

Click **No** to go directly to Schedule C and not enter any Schedule B information. **NO**



**Schedule C: Income, Loans and Business Positions**

**Add an interest in real property**

**Street Address or Precise Location:**  
**Address 1:**   
**Address 2:**   
**City:**   
**State:**  **Zip Code:**

Type required information and click **Enter** to update and save the information.

**Fair Market Value:**  
 \$2,000 - \$10,000  \$10,001 - \$100,000  \$100,001 - \$1,000,000  Over \$1,000,000

**If applicable, list date(s).**  
**Date Acquired:**   
**Date Disposed:**

**Nature of Interest:**  
 Ownership / Deed of Trust  Easement  
 Leasehold (specify years remaining)   
 Other

If this box checked complete the information on the loan

**Do you have a personal loan or a loan received not in a lender's regular course of business? (Check if Yes)**  
(Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable)

**If Rental Property, Select Gross Income Range:**  
 No Rental Income  \$0 - \$499  \$500  
 \$1,001 - \$10,000  \$10,001 - \$100,000  
(If the Rental Income Source is \$10,000 or on the next page)

**Do you have a personal loan or a loan received not in a lender's regular course of business? (Check if Yes)**

**Name of Lender:**   
**Address 1:**   
**Address 2:**   
**City:**   
**State:**  **Zip Code:**   
**Business Activity of Lender:**   
**Interest Rate of Loan (Enter a zero - 0 - if there is no interest):**   
**Term in Months: (Do NOT enter the term in years!)**   
**Time During the Reporting Period:**   
 \$2,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000  
**Guarantor Name: ( If applicable )**

**Enter** **Next Section**

If no Schedule B entries are to be entered, click **Next Section** to go directly to Schedule C



### If 'No Rental Income' selected for Gross Income Received

**Add an interest in real property**

Street Address or Precise Location:  
 Address 1:   
 Address 2:   
 City:   
 State:  Zip Code:

If filing additional interests in real property type info and click **Enter** to update and save the info. Repeat to add more interests in real property. Click **Next Section** to continue to Schedule C.

Fair Market Value:  
 \$2,000 - \$10,000  \$10,001 - \$100,000  \$100,001 - \$1,000,000  Over \$1,000,000

If applicable, list date(s).  
 Date Acquired:   
 Date Disposed:

Nature of Interest:  
 Ownership / Deed of Trust  Easement  
 Leasehold (specify years remaining)   
 Other

If Rental Property, Select Gross Income Received:  
 No Rental Income  \$0 - \$499  \$500 - \$1,000  
 \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000  
 (If the Rental Income Source is \$10,000 or more from a single source, the tenant name(s) will need to be entered on the next page.)

Do you have a personal  (check if Yes)  lender's regular course of business?

If no additional Schedule B entries are to be entered, click **Next Section** to go directly to Schedule C.

Previous Schedule B transactions entered. Click **Edit** to change the info or **Delete** to delete it.

Address	Edit	Delete
10 Oak Way	<a href="#">Edit</a>	<a href="#">Delete</a>

### If Gross Income Received is a \$ amount

**Add Tenant Name**

Name:

If you do not want to add a tenant's name but want to go directly to Schedule C click **Next Section**.

If you do not want to add a tenant's name but want to add a new Schedule B click **New B**.

**Enter** **Next Section** **New B**

Type Tenant's Name if rental income source is \$10,000 or more from a single source. Click **Enter** to update and save the info.

**Enter**

**Add Tenant Name**

Name:

Type Tenant's Name and click **Enter** to update and save the info. Repeat to add more tenant names.

If you do not want to add additional tenant names but want to go directly to Schedule C click **Next Section**.

If you do not want to add additional tenant names but want to add a new Schedule B click **New B**.

**Enter** **Next Section** **New B**

Income Source Name	Edit
John Brown	<a href="#">Edit</a>

Tenant names already added to the system. Click **Edit** to change the info or **Delete** to delete it.

**Next Section**

[Schedule C Part 1: Income Received]

### Schedule C: Part 1

### Income, Loans and Business Positions: Income Received

**Question**

Do you have Schedule C part 1 Income Received information and Schedule C part 2 Loan Received information?

Click "Yes" to enter Schedule C part 1 Income Received information

Click "No" to go directly to Schedule C Part 2: Loan Received and not enter Schedule C Part 1: Income Received information

Yes  
↓

No  
↓

Schedule C Part 2: Loan Received

**Add Income Source**

Name of Source of Income:

Address 1:

Address 2:

City:

State:  Zip Code:

Business activity, if any, of source:

Your Business Position:

Gross Income Received:

\$500 - \$1,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000

Consideration for which income was received:

Salary  Spouse's Income  Loan repayment

Sale of ( Property, Car, Boat, etc.):

Commission or  Rental Income

Other:

Type information on the Income Source and click **Enter** to update and save information

If no Schedule C Part 1 Income Received entries are to be entered click **Next Section** to go directly to Schedule C Part 2: Loan Received

Enter  
↓

Gross income received from Salary/Spouse's Income/Loan Repayment/Sale

Gross income received from Commission or Rental Income



**Add Income Source**

If Gross Income is \$10,000+ type name of income source. Click **Enter** to update and save info.

Name

**Enter** **Back**



If Gross Income is less than \$10,000 click **Back**.

**Enter**



**Add Income Source**

If required continue to add Income Source names. Click **Enter** to update and save info. When finished, click **Back**.

Name

**Enter** **Back**

If you are not adding additional Income Source names click **Back**.

Income Source Names already entered in the system. Click **Edit** to change or **Delete** to delete the info.

Income Source Name	Edit	Delete
Dave Bowery	<a href="#">Edit</a>	<a href="#">Delete</a>

**Back**



**Edit Income Received**

Name of Source of Income:

Address 1:

Address 2:

City:

State:  Zip Code:

Business activity, if any, of source:

Your Business Position:

Gross Income Received:  
 \$500 - \$1,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000

Consideration for which income was received:  
 Salary  Spouse's Income  Loan repayment  
 Sale of (Property, Car, Boat, etc.):   
 Commission  
 Other:

**Add Source**

Income Source Names already entered in the system. Click **Edit** to change the information or **Delete** to delete it.

Income Source Name	Edit	Delete
	<a href="#">Edit</a>	<a href="#">Delete</a>
	<a href="#">Edit</a>	<a href="#">Delete</a>

Click **Update** to return to the Add Income Source page.

**Update**

Income Sources already entered in the system. Click **Edit** to change the information or **Delete** to delete it.



**Update**





**Add Income Source**

Name of Source of Income:

Address 1:

Address 2:

City:

State: Zip Code:

Business activity, if any, of source:

Your Business Position:

Gross Income Received:

- \$500 - \$1,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000

Consideration for which income was received:

- Salary  Spouse  
 Sale of ( Propert  
 Commission or  
 Other:

If required, add additional Source of Income. Click **Enter** to update and save information. Repeat to add additional Sources of Income. When finished, click **Next Section** to go to Schedule C Part 2: Loan Received.

If additional Sources of Income are not being added, click **Next Section** to go directly to Schedule C Part 2: Loan Received.

Sources of Income information already entered in the system. Click **Edit** to change the information or **Delete** to delete it.

**Enter** **Next Section**

Name	Address	Edit	Delete
Rental property	10 Bush Drive	<a href="#">Edit</a>	<a href="#">Delete</a>

**Next Section**



[Schedule C Part 2: Loan Received]

## Schedule C: Part 2

### Income, Loans and Business Positions: Loans Received

**Question**

**Do you need to record any Schedule C part 2 Loan Received transactions?**

Click **Yes** to enter Schedule C part 2 Loan Received information. Click **No** to continue to Schedule D.

Click **Yes** to enter Schedule C Part 2: Loan Received information

**YES**

**NO**

Click **No** to go directly to Schedule D: Income-Gifts and not enter Schedule C Part 2: Loan Received information

**Yes**  
↓

**No**  
↓

**Schedule D: Income - Gifts**

**Add A Loan Received**

Name of Lender:

Address 1:

Address 2:

City:

State:  Zip Code:

Business Activity of Lender:

Interest Rate of Loan (Enter a zero if there is no interest):

Loan Term, in months. Do NOT enter the term in years.

Highest Balance During the Reporting Period:  
 \$500 - \$1,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000

Security for Loan:  
 None  Personal Residence  Guarantor   
 Other

Real Property

Address 1:

Address 2:

City:

State:  Zip Code:

**Enter** **Next Section**

Type information on the Loan Received. Click **Enter** to update and save information.

This information only shows when Real Property is the security for the loan

If no Schedule C Part 2: Loan Received entries are to be entered click **Next Section** to go directly to Schedule D: Income-Gifts.

**Enter**  
↓

**Add A Loan Received**

Name of Lender:

Address 1:

Address 2:

City:

State:  Zip Code:

Business Activity of Lender:

Interest Rate of Loan (Enter a zero if there is no interest):

Loan Term, in months. Do NOT enter the term in years.

Highest Balance During the Reporting Period:  
 \$500 - \$1,000  \$1,001 - \$10,000  \$10,001 - \$100,000  Over \$100,000

Security for Loan:  
 None  Personal   
 Other   
 Real Property

**If required, add an additional Loan Received. Click **Enter** to update and save the info. Repeat to add additional Loans Received. When finished, click **Next Section** to go to Schedule D: Income-Gifts.**

**If additional Loans Received are not being added, click **Next Section** to go directly to Schedule D: Income-Gifts.**

**Loans Received information already in the system. Click **Edit** to change the information and **Delete** to delete it.**

Address	Edit	Delete
11 Bucks Drive	<a href="#">Edit</a>	<a href="#">Delete</a>

**Next Section**



**[Schedule D: Income – Gifts]**

## Schedule D Income - Gifts

**Question**

Do you need to record any Schedule D transactions?

Click **Yes** to enter Schedule D: Income-Gifts information

Click **No** to go directly to Schedule E: Gifts-Travel Payments and not enter Schedule D: Income-Gifts information

Yes  
↓

No  
↓

Schedule E: Travel Payments, Advances & Reimbursements

**Add Gifts Received**

Name of Source

Address 1:

Address 2:

City:

State:  Zip Code:

Business Activity, if any, of source:

Gift # 1 Date:

Gift # 1 Value:

Gift # 1 Description:

Gift # 5 Date:

Gift # 5 Value:

Gift # 5 Description:

Enter up to five gifts from a single source on this page. Click **Enter** to save and update the information.

If no gifts are to be entered, click **Next Section** to go directly to Schedule E.

Enter  
↓

Name of Source  
  
 Address 1:  
  
 Address 2:  
  
 City:  
  
 State:      Zip Code:  
        
 Business Activity, if any, of source:

Gift #1 Date:  
  
 Gift #1 Value:  
  
 Gift #1 Description:

Gift #5 Date:  
  
 Gift #5 Value:  
  
 Gift #5 Description:

    

Name	Address	Edit	Delete
Dave Mundoon	10 Orange Drive	<a href="#">Edit</a>	<a href="#">Delete</a>

Add gifts from a different source and click **Enter** to update and save the information. Repeat to add more gifts from different sources. When finished, click **Next Section** to go to Schedule E.

If gifts from a different source are not being added, click **Next Section** to go directly to Schedule E.

Gifts information already added to the system. Click **Edit** to change the information or **Delete** to delete it. To add additional gifts to a source after gifts entry has been updated click **Edit** next to the name of the person and follow directions below.

**Edit (to add additional gifts)**



**Edit Gifts Received**

Name of Source  
  
 Address 1:  
  
 Address 2:  
  
 City:

    

    

Date	Amount	Description	Edit	Delete
3/4/2006	\$100.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>
5/6/2006	\$150.00	Dinner	<a href="#">Edit</a>	<a href="#">Delete</a>
7/2/2006	\$200.00	Game Tickets	<a href="#">Edit</a>	<a href="#">Delete</a>
8/2/2006	\$60.00	Necklace	<a href="#">Edit</a>	<a href="#">Delete</a>
3/2/2006	\$120.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>

Click **Update** to save any information changes on this page and return to the Add Gifts Received page.

Click **Add Gift** to add additional gift (s) to this source.

Gifts entered previously for this source. Click **Edit** next to the transaction to change information or **Delete** to delete it.

**Add Gift**



**Add a Gift**

**Gift Date:**

**Gift Amount:**

**Gift Description:**

Type information on the gift and click **Enter** to update and save the information. Repeat the process to add additional gifts if required. When finished, click **Back** to return to the Edit Gifts Received page.

**Enter**      Click to return to the Edit Gifts Received Page.

**Back**

Date	Amount	Description	Edit	Delete
3/4/2006	\$100.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>
5/6/2006	\$150.00	Dinner	<a href="#">Edit</a>	<a href="#">Delete</a>
7/2/2006	\$200.00	Game Tickets	<a href="#">Edit</a>	<a href="#">Delete</a>
8/2/2006	\$60.00	Necklace	<a href="#">Edit</a>	<a href="#">Delete</a>
3/2/2006	\$120.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>

**Back**

↓

**Edit Gifts Received**

**Name of Source**

**Address 1:**

**Address 2:**

**City:**

**State:**      **Zip Code:**  
     

**Busin**      of s

Click **Update** to return to the Add Gifts Received page.

Click to return to the Add a Gift page.

**Update**      **Add Gift**

Date	Amount	Description	Edit	Delete
3/4/2006	\$100.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>
5/6/2006	\$150.00	Dinner	<a href="#">Edit</a>	<a href="#">Delete</a>
7/2/2006	\$200.00	Game Tickets	<a href="#">Edit</a>	<a href="#">Delete</a>
8/2/2006	\$60.00	Necklace	<a href="#">Edit</a>	<a href="#">Delete</a>
3/2/2006	\$120.00	Lunch	<a href="#">Edit</a>	<a href="#">Delete</a>

**Update**



**Add Gifts Received Page  
Next Section**



[Schedule E: Travel Payments, Advances and Reimbursements]

## Schedule E Travel Payments, Advances and Reimbursements

**Question**

**Do you need to record any Schedule E transactions?**

Click **Yes** to enter Schedule E: Gifts-Travel information. Click **No** to continue to the Review Page and not enter Schedule E: Gifts-Travel information.

**Yes**  
↓

**No**  
↓

**Review Page**

**Edit Gifts Received From A Single Source**

Name of Source:

Address 1:

Address 2:

City:

State:  Zip Code:

Business Activity, if any, of source:

Start Date (if applicable):

End Date (if applicable):

Amount:

Type of Payment:  
 Gift  Income

Description:

**Enter**  
↓

**Edit Gifts Received From A Single Source**

**Name of Source:**

**Address 1:**

**Address 2:**

**City:**

**State:**      **Zip Code:**  
     

**Business Activity, if any, of source:**

**Start Date (if applicable):**

**End Date (if applicable):**

**Amount:**

**Type of Payment:**  
 Gift  Income

**Description:**

**Enter**      **Next Section**

**Name**      **Address**      **Edit**      **Delete**

Beth's Travel	14 Ship Lane	<a href="#">Edit</a>	<a href="#">Delete</a>
---------------	--------------	----------------------	------------------------

If required, add an additional Gifts Received from a Single Source. Click **Enter** to update and save the info. Repeat to add additional Gifts Received. When finished, click **Next Section** to go to the Review Page.

If additional Gifts Received from a Single Source are not being added, click **Next Section** to go directly to the Review Page.

Gifts Received from a Single Source already in the system. Click **Edit** to change the information and **Delete** to delete it.

**Next Section**  
  
**[Review Page]**

## Review and Print Filing

[Cover Page](#)

[Schedule A-1](#) Transactions: 2  
 Comments for Schedule A-1

[Schedule A-2](#) Transactions: 4  
 Comments for Schedule A-2

[Schedule B](#) Transactions: 2 Income Received  
 Comments for Schedule B

[Schedule C-1](#) Transactions: 1 Loans Received  
 Comments for Schedule C-1

[Schedule C-2](#) Transactions: 0  
 Comments for Schedule C-2

[Schedule D](#) Transactions: 1  
 Comments for Schedule D

[Schedule E](#) Transactions: 0  
 Comments for Schedule E

Check here and click 'Enter' if you are a section 87200 filer:

[Next Section](#)

**Next Section**



[Review Page](#)

**Review and E-File**

**STEP 1 - Review Draft**

Click the "Review Draft" button to generate a PDF draft of your filing document. This is *NOT* the version you paper file! This is for review purposes only. If the document appears to be correct, continue to "Step 2 - E-File" below. If the document does not appear to be correct, use the "Review" link above to return to the document review page to make corrections.

[Review Draft](#) Click to generate a PDF draft of your filing document. Review draft

**STEP 2 - SEI E-File**

Once you have reviewed your document and you believe it is ready to e-file, click the "E-File" button below. An electronic version of your document will be transmitted to the agency, then you will be directed to a page where you can print the filed version of your document. If you have not done so, use the Review Filing option above to review your form before officially filing. Once you select this option, you have officially submitted an e-filed form.

[E-File](#) Click to E-File

**E-File**



Cover Page - Signature

**Signature**

**Verification**  
 I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.  
 I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date signed defaults to today's date. Change if necessary. Enter your signature. This information appears in Part 5 of the Form 700 Cover Page

Enter Date Signed: 2/26/2008

Enter Your Signature:

Click E-File below to electronic

[E-File](#)

[Cancel](#)

Click E-File to electronically file your SEI Form 700. Message appears 'One moment while your information is being processed'. If e-filing fails error message appears here



Your e-filing was completed

**What now?**

Now that your document has been e-filed:

1. Print two copies of your filed document.
2. Sign and submit one copy to your filing official. Keep the unsigned copy for your records.

You might also want to create a hard copy of your document on a CD or disk or CD for future reference.



Click **Print** to obtain two paper copies of your e-filed document. Sign and submit one copy to your filing official. Keep a copy for your records. Once your document is e-filed an ID # is added to the Form 700

**Thank you for using the SEI E-filing system!**

It is safe to close your browser.