Filing Officers Tutorial for Santa Cruz County

LOGGING IN

To get started, sign in to your account using credentials provided to you by your agency:

1. Open your web browser and browse to:

    http://ssl.netfile.com/admin/Login.aspx?aid=scco. The SEI Admin Login page opens.

2. *User* - Enter your user name. Your user name is NOT case-sensitive. You may enter it in all lower case.

3. *Password* - Enter your password. Your password is NOT case-sensitive. You may enter it in all lower case.

4. Click the *Log In* button to enter your account. The SEI Dashboard page opens.

SEI DASHBOARD

The home page for the SEI Admin system and contains the following menus:

Filers Menu - contains link to view filer accounts.

See "Working with Filers" on page 1.

Reports Menu - The Reports menu provides links to use the Filing Status Report/

See "Working with Reports" on page 2.

Advanced Menu - The Advanced menu contains a link to change your account password.

See "Working with Advanced Features" on page 3.

WORKING WITH FILERS

Use the links on the Filers menu to view existing filer accounts in your department.

Note: NetFile uses the generic term "department" for all of your agency's departments, boards, divisions, committees, etc.

Viewing Filers

To view a list of all of the filers in your department, leave all search fields blank and click the *Submit* button. You may then click on a filer's *Edit* link to go to the filer's Filer Dashboard - the repository for all the information about this filer including all electronic and paper statements.

What to Do

If you see any discrepancies, you need to do the following:

- *Filer not there* - contact the County Clerk.

- *Filer info incorrect* - contact the County Clerk.

- *Filer highlighted in pink* - the filer is terminated.

- *You cannot edit filer information* - County Clerk will edit.

WORKING WITH REPORTS

You use the links in the Reports menu to generate a report of all of the filers in your department who have a requirement to file a Form 700

Filing Status Report - Click the Filing Status Report link to view information about the status of filings in your department.

To create a Filing Status Report:

1. *Year* - Use the drop-down list to select the year for the filings you are interested in seeing.

2. *Department* - Only the department(s) you are responsible for are displayed on the drop down list.

3. *Type of Report* - Select the type of filing report to generate from the drop-down list.

    a. *All Filers* - This is the default and will return all filers who have a requirement to file a Form 700 in the year you selected in step 1, including all those who have not filed and those who have filed.

    b. *Non-Filers* - This option returns all those who must file, but have not yet filed. This is usually the group you are most interested in as you will want to remind the individuals to complete their Form 700 filings.

Note: If one of your filers has submitted a paper Form 700 (not electronically filed) the system will see the filer as a Non-Filer until one of Santa Cruz County's admin users enters the filing into the system.

    c. *Successful Filers* - This option returns all those who must file, and have successfully filed.

4. *Type of Filer* - Select All, 87200 or 700 filers. 87200 filers are a special class of filers whose Form 700 statements must be forwarded to the FPPC (Fair Political Practices Commission) by the County.

5. *Search* - Click the *Search* button to search for the status of filings using the information you have specified on the form.

    - *Clear* - The *Clear* button removes all information you have entered in the form.

- *Export* - Click the *Export* button to download an Excel file containing the filing status for the filers you have specified.

Note: Leave all fields empty to create a report for all filers in your department(s).

WORKING WITH ADVANCED FEATURES

Use the link on the Advanced menu to change your password.

Change Staff Password

To change your password:

1. Click the *Change Staff Password* link. 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.

Note: As a Filing Officer5, you have no ability to view or change the passwords of filers.