NAVIGATING JCOPE'S FDS ONLINE APPLICATION

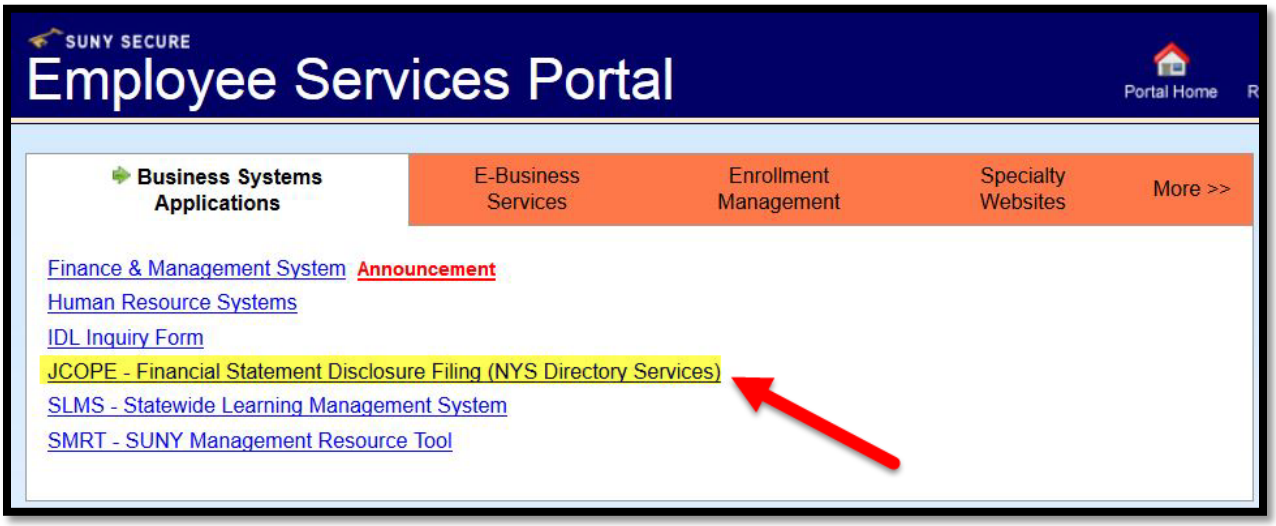
SUNY FILERS EDITION

October 2015

FDS FILER

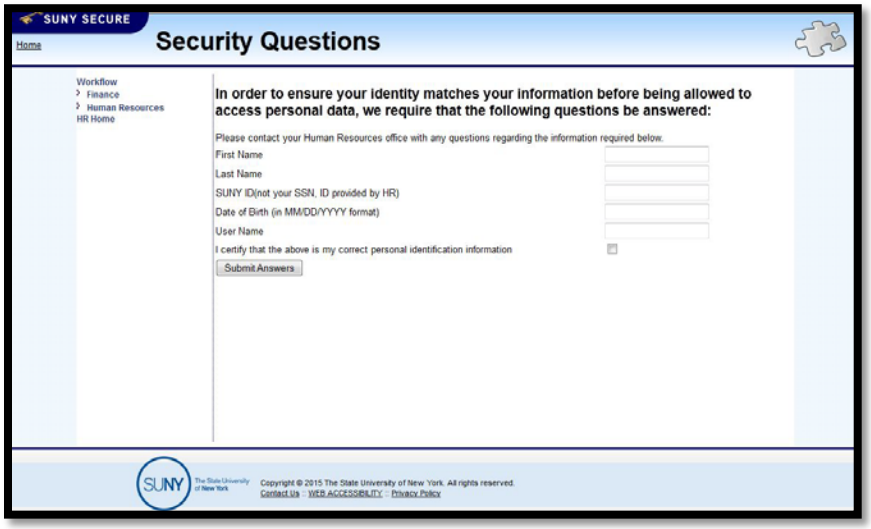
How to Log into the JCOPE Financial Disclosure System from the SUNY Portal

1. Go to the website: www.system.suny.edu
2. Under Employee Resources choose SUNY Portal
3. Select your campus (ex: "Albany")
4. Enter your Campus UserID and password. These are the same as what you would use to login to your campus (ex: MyUAlbany.)
5. Click on the login button
6. Click on **"Business Systems Applications"** tab, if not shown by default.
7. Click on the **"JCOPE – Financial Statement Disclosure Filing (NYS Directory Services)** link.

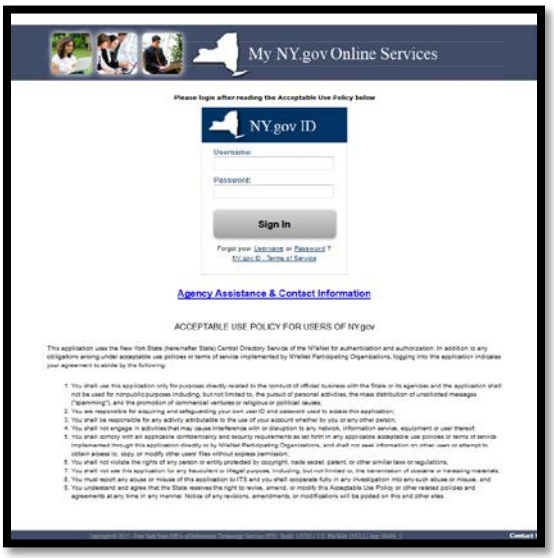


➔ To log into the **SUNY NY.gov** portal select the **"Click here for NY.gov ID Portal"** button, *see below*; or

➔ If you **<u>have not</u>** completed the SUNY U-Wide Secure Federation attribute requirements, the following screen will appear. Complete all required information and click **"Submit Answers"** button. If you need assistance finding your SUNY ID, contact your local campus Human Resource Department.



➔ **If you see the below image after clicking the "JCOPE – Financial Statement Disclosure Filing (NYS Directory Services) an error has occurred.**

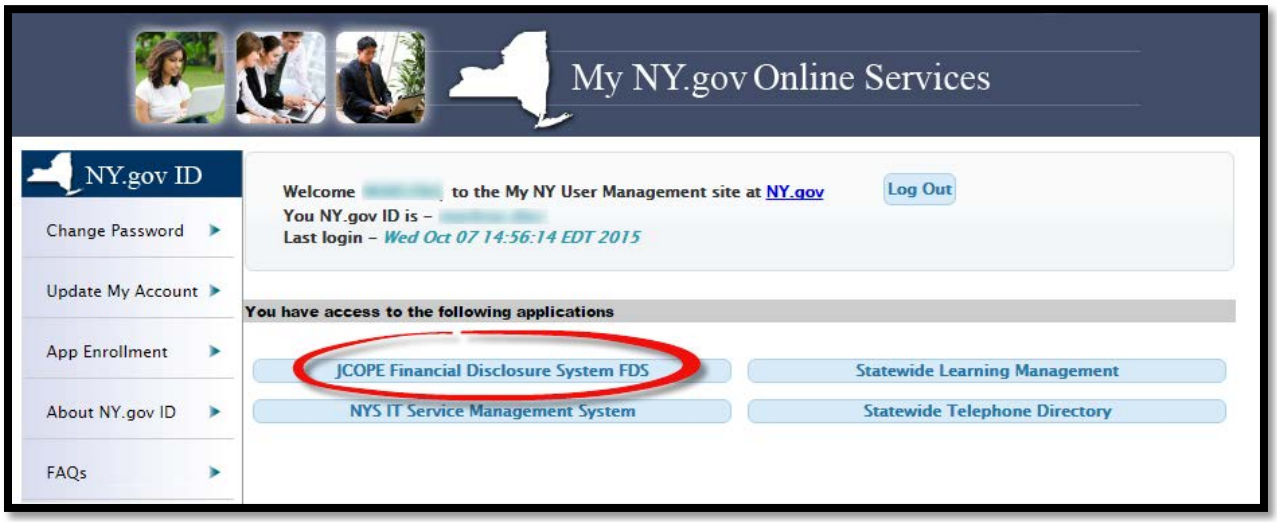


NOTE: If you see the NY.gov ID login page for any reason, **DO NOT** attempt to log in. The credentials NY.gov is looking for are different from the Campus User ID and password. Attempting to log in at the NY.gov ID page with your usual credentials will fail. Multiple failures will cause your account to be locked. Sometimes, refreshing or re-accessing a page on the NY State side leads to another SUNY login page that drops you off at this NY.gov ID login page.

If you arrive at this login page, close your browser entirely and begin again at Step 1.

8. Make a note of your SUNY NY.gov ID, if you do not see the JCOPE Financial Disclosure System FDS link then contact your local campus HR department to have it added.

9. Click on the JCOPE Financial Disclosure System FDS Button.



If you are having issues with Steps 1 through 9, please contact your local campus help desk. If the issue is then found to reside off campus, contact the System Administration Help desk at:

System Administration Help Desk
Contact the Help Desk at 518-320-1208
helpdesk@suny.edu
Office Hours: 8:00 a.m. – 5:00 p.m., Mon – Fri

JCOPE FDS Online Application Verification Process

The verification page will link your NYS directory services account to your FDS Filer information. This is a ONE TIME PROCESS. Profile information for all existing FDS Filers has been transferred into the new FDS system however your FDS Filer information must be linked to your Directory Services Account.

If you do not see the following screen requesting your Email address and password, you have already been linked to the new system. Skip to page 6 of these instructions.

1. Type in the **"E-mail Address"** you had on file with JCOPE to access the prior online system
2. Enter your **"Password"**
3. Click **"Verify"**

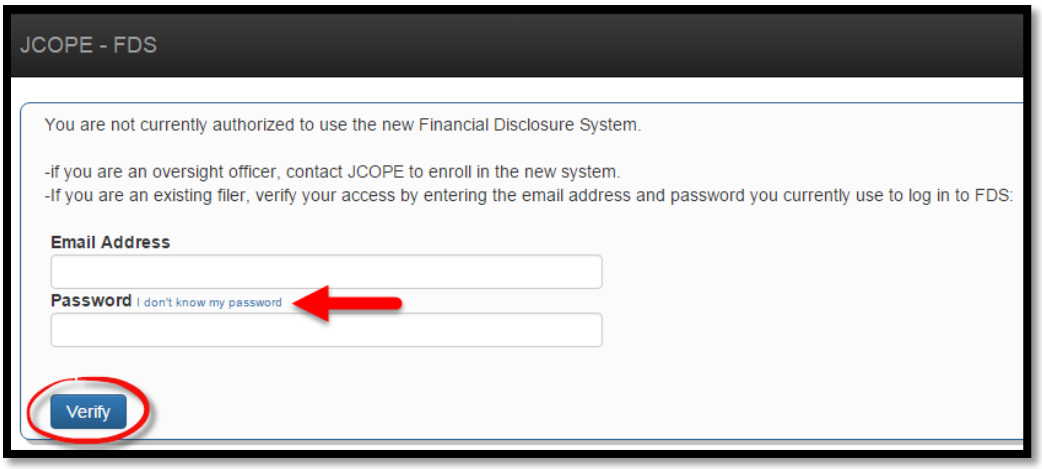
4. A matching record will appear. Click **"Confirm"** to verify, or "**This is not me"** if the information is incorrect.

5. Click the blue **"Here"** to access the Financial Disclosure System

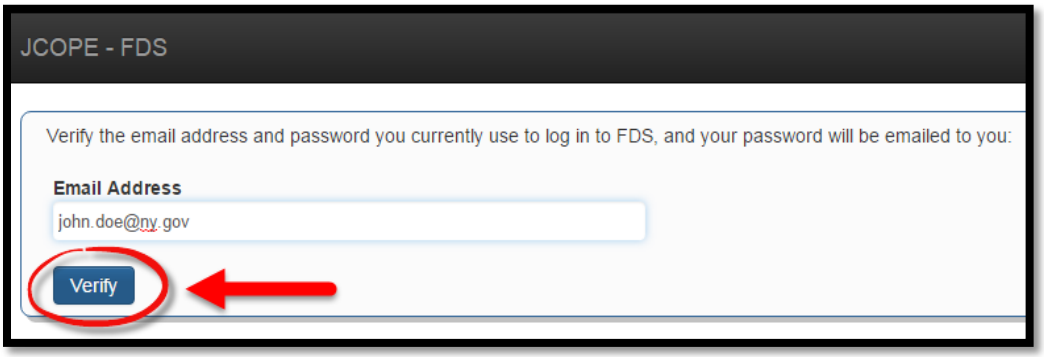
6. If no matching record is found, click **"Contact JCOPE"** and your E-mail will be answered promptly

Forgotten Password Instructions

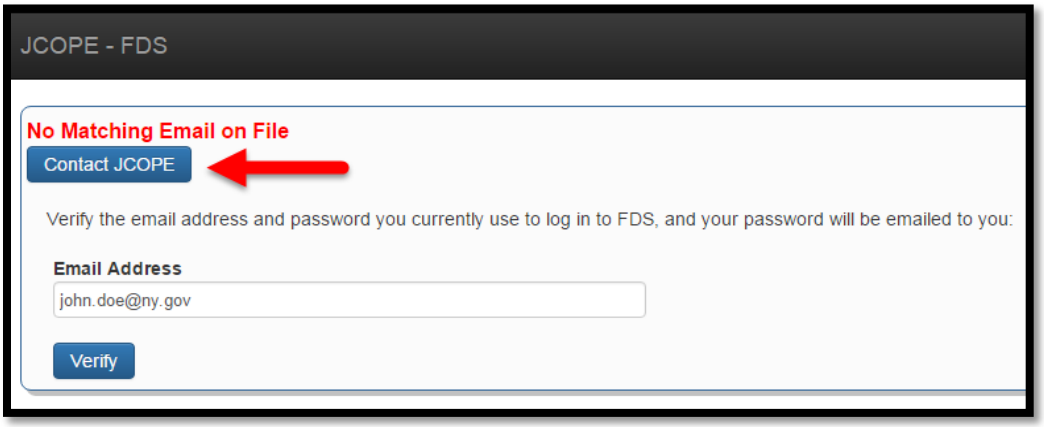
1. Click the **"I don't know my password**" link



2. Enter the Email Address you had on file with JCOPE to access the previous online system, and click **"Verify"**



3. If no matching record is found, click **"Contact JCOPE"** and a message will be e-mailed to JCOPE staff



Welcome to the FDS Filer Dashboard

What is a dashboard?

A dashboard is a visual display that organizes and tracks the most commonly used information in a format that fits entirely on a single computer screen.

The FDS Filer Dashboard has two areas of navigation; **main** and **sub navigation**. **Main navigation** is distinguished by the dark grey bar, ***see below***.

Let's take a moment now to explore the functionalities built into the "**Main Navigation Menu**"

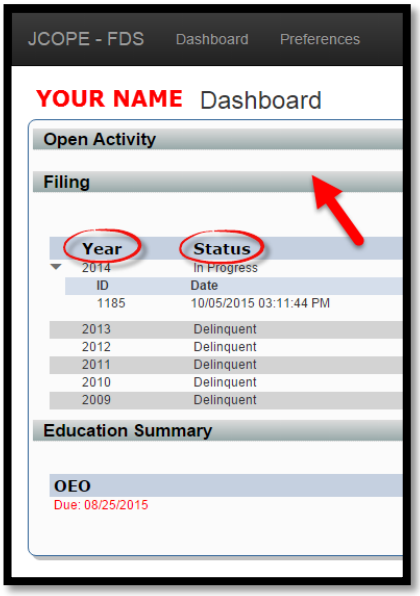
Main navigation Menu

- The **"JCOPE – FDS"** and the **"Dashboard"** menu options both direct you to the main dashboard page (the initial page you view every time you log into the FDS system).
- **"Preferences"** menu – allows you to select your default color scheme.

Sub navigation Menu

The FDS Filer Dashboard is built to easily organize and track the following categories of data within each of the following sub navigation menus:

- **Open Activity** –This section lists any activities that you as the filer has pending and may require some action.
- **Filing** – displays current and prior FDS Filings
- **Education Summary** – alerts you to any upcoming mandatory ethics training requirements



To view the data within each of these sub navigation menus, click the corresponding light grey column bar to expand the data. Click the grey column bar again, to collapse and hide the data. To view results that span more than one page, click the page numbers.

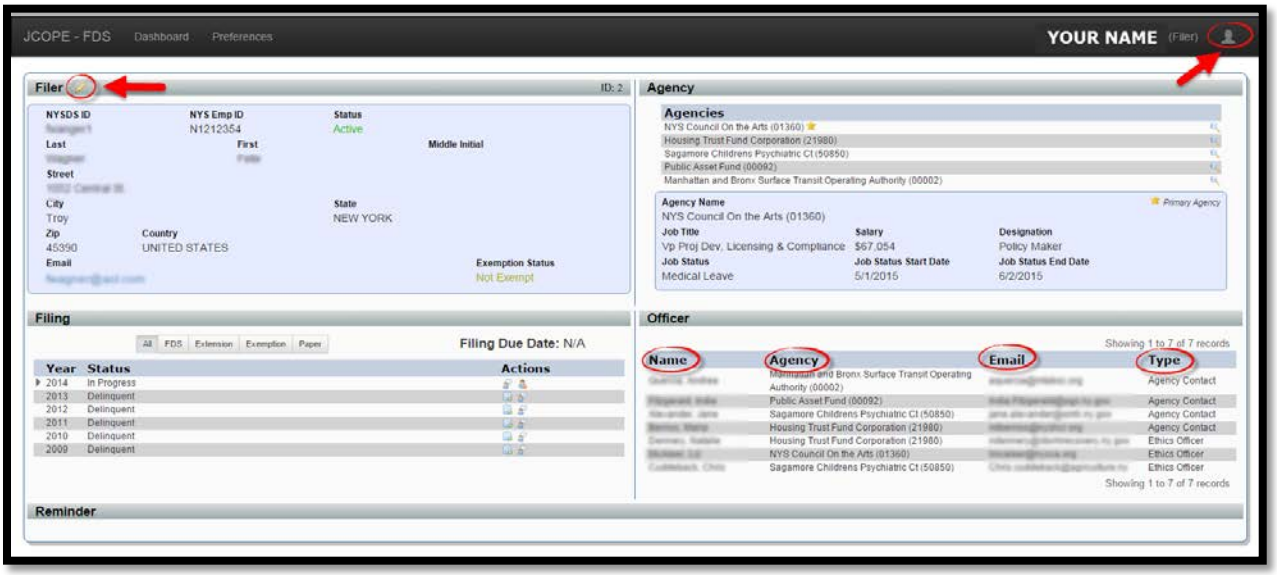
PRO TIP: Column headings can be filtered to display information alphabetically or in ascending or descending order. Click any column heading to filter results. ***See below***.

Updating your FDS Profile

Your FDS Filer Profile displays four main categories of information: contact information, any agencies you are affiliated with (your primary agency is denoted with a "star" icon), a snap shot of any current and prior FDS Filings, as well as the names and contact information of your agency-affiliated ethics officers and agency contacts.

- To view your FDS user profile, click the light grey silhouette located on the upper right hand side of the Main Menu navigation.

- Information contained within the **"Agency"** and **"Officer"** column headings can only be edited by your Ethics Officer.

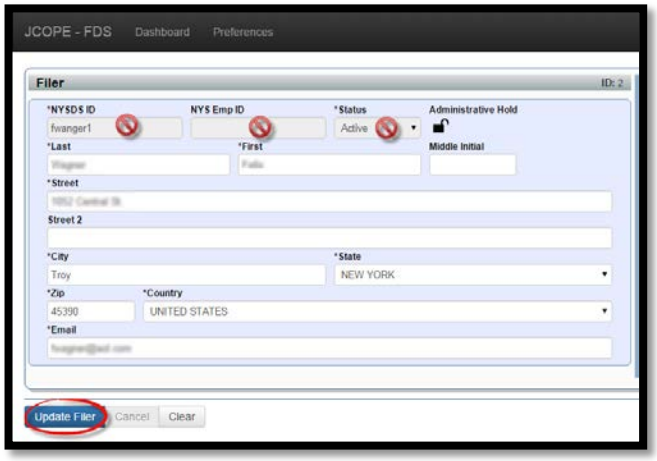


Steps to update your FDS Filer Profile

1. Click the grey silhouette located at the top right hand corner of the Main navigation menu
2. Click the pencil icon located next to the grey **"Filer"** column

   ➔ The following fields cannot be edited under the Filer column: **"NYSDS ID"**; **"NYS Emp ID"**; and **"Status"**

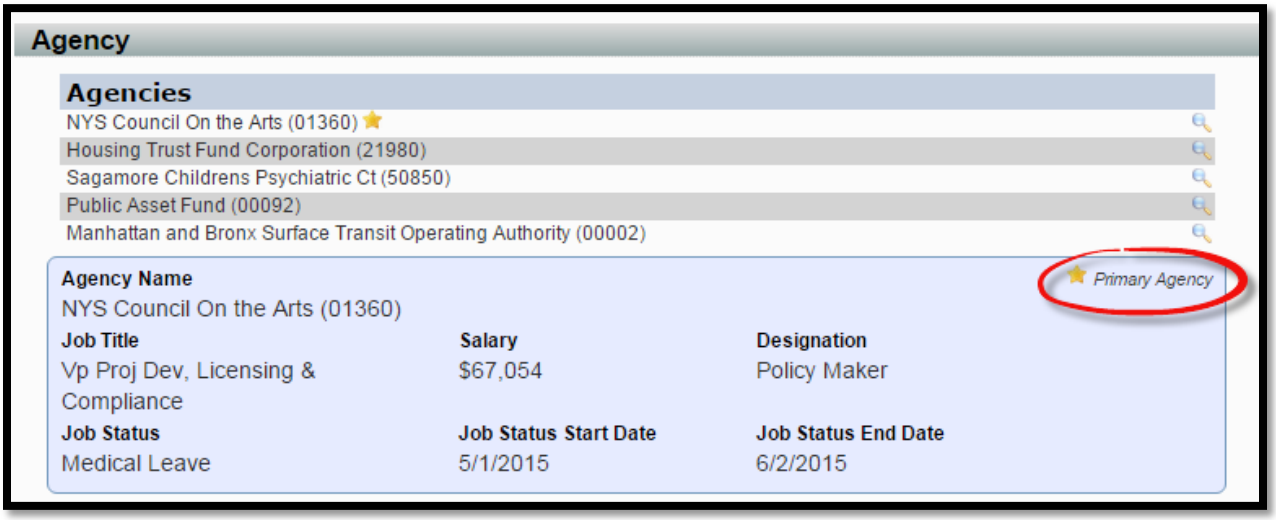
3. Update your contact information in the appropriate fields
4. To save your changes, click **"Update Filer"**, **or**
5. Click **"Clear"** to erase all information in the form fields, or
6. If you do not want to save your changes to the FDS Filer Profile Click **"Cancel"**



PRO TIPS: Form fields and menu items that contain a symbol of an upside down triangle, indicate a drop down menu. Fields denoted with an * asterisk are required fields.

Fields in the **"Agency"** column of your FDS Profile can only be changed by an Ethics Officer. Your primary agency is denoted by the "Star" icon.

Click the "hour glass" icon to view information from any agency you are associated with.

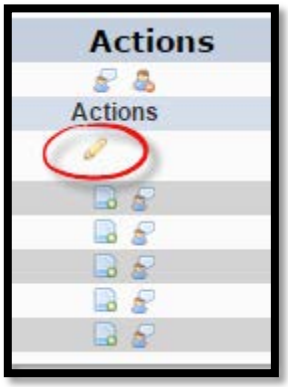


Viewing and Filing your Financial Disclosure Statement

The new online FDS application allows you to view, edit, or file a new Financial Disclosure Statement from the following areas within the online application:

1. FDS Filer Dashboard; and/or
2. FDS Filer Profile

From your Dashboard



The **"Filing"** sub navigation menu is broken down into three main columns:

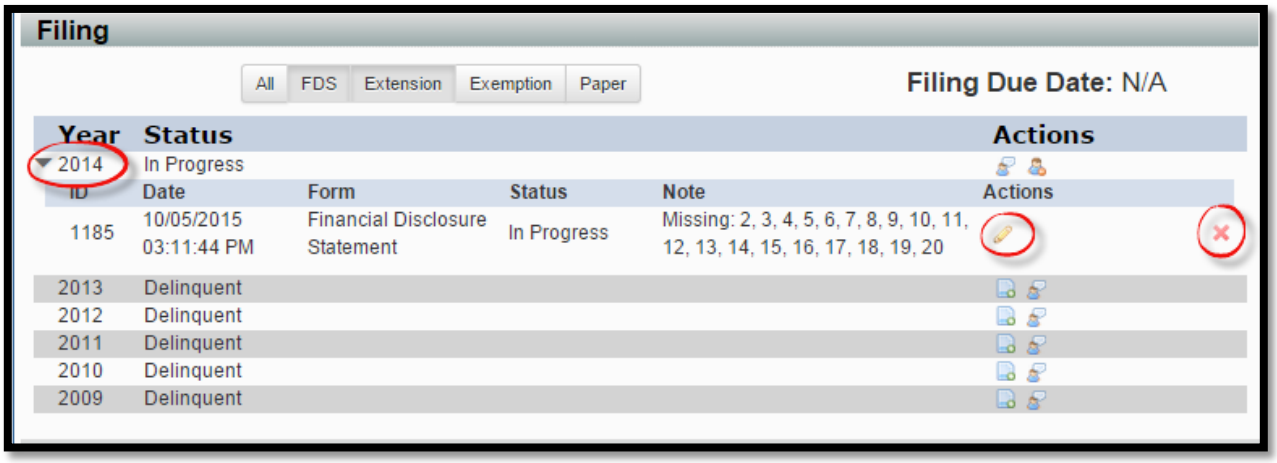
- **Year**
- **Status** – identifies if your form is: *In Progress, Delinquent, Filed, or Not Filed*.
- **Actions** – allows you to *Submit a new FDS form, Request an Extension*, and *Request an Exemption from Filing your FDS.*

Functions available under the Actions column from the FDS Filer Dashboard

1. Click the paper icon next to the corresponding year to **"Submit a new FDS"**
2. To **"Request an Extension"** from filing your FDS Form, click the person icon**.**
3. To **"Request an Exemption"** from filing your FDS Form in its entirety, click the person with the circle backslash icon.

To complete FDS forms that were previously started and not yet submitted

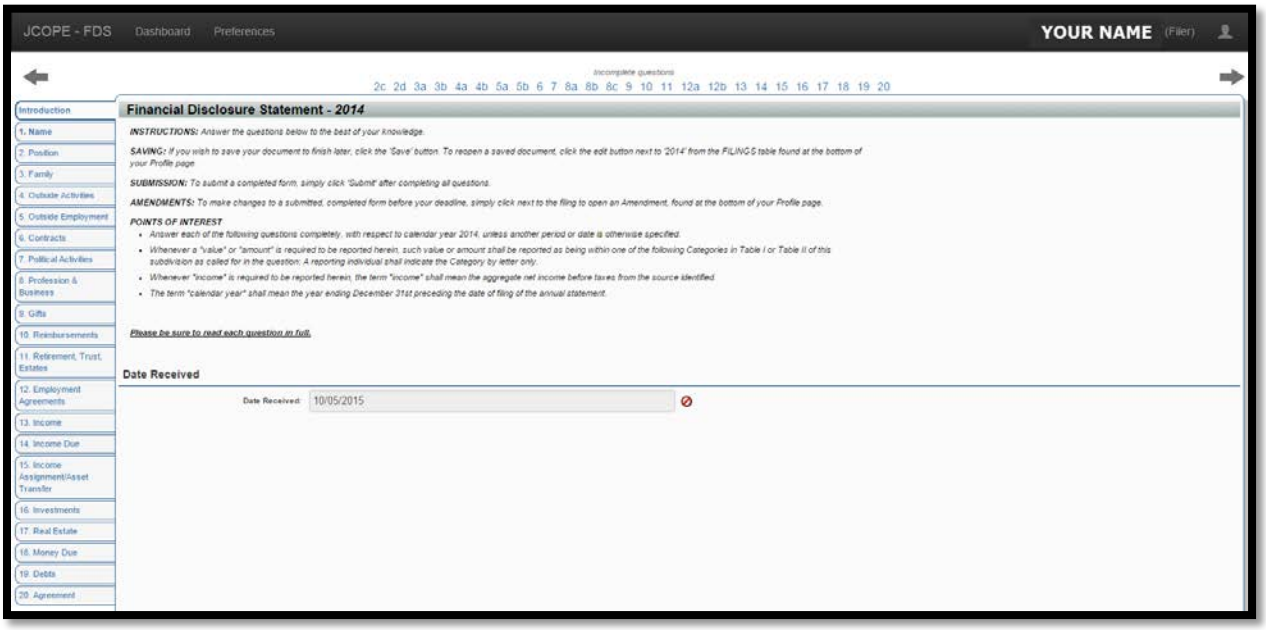
1. Click the **"upside down triangle"** next to the corresponding year to expand the row of information.



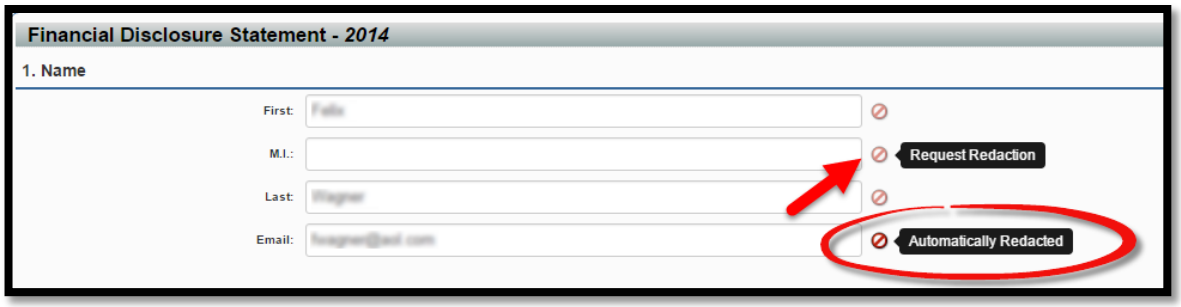
2. Click the pencil icon to edit your FDS Form, or Click the red **"X"** to withdraw the form.

Steps to file your Financial Disclosure Statement

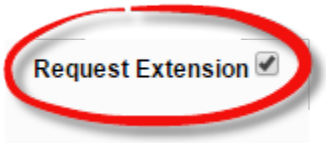
The FDS question navigation bar is located to the left of your screen. Each button represents a question found on the FDS form. Click each of the twenty individual sections, and enter the appropriate information for each question field. To navigate between pages, click the left or right arrows located underneath the Main navigation menu.



PRO TIP: Scroll your mouse over the "circle-backslash symbol" to view what information within each question field is automatically redacted from public view, and what areas of information you can request to have redacted. Click the **"circle backslash"** symbol to request certain information be removed from the FDS Filing made available to the public. ***See below.***



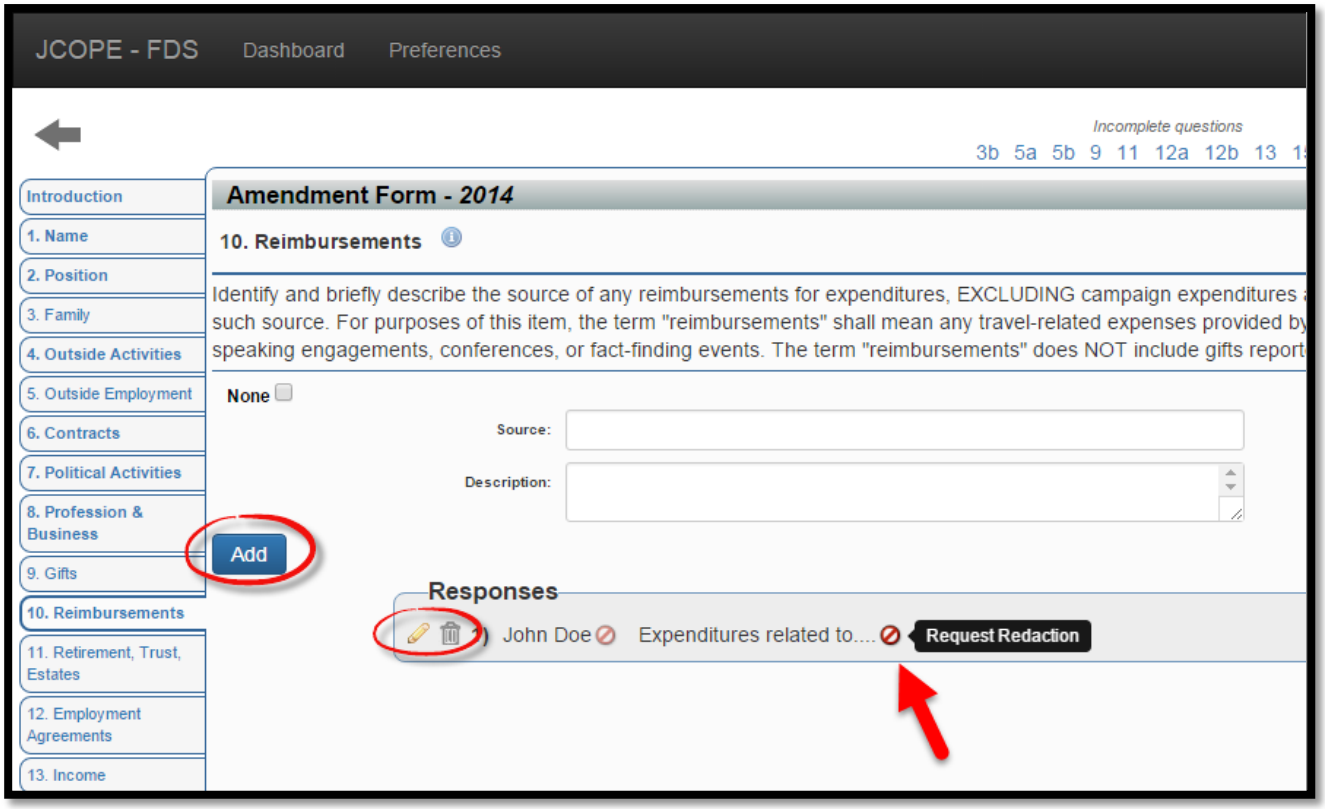
FDS Filers may request an extension of time to answer certain questions. Click the **"Request Extension"** check box to utilize this feature.



Entering and saving information within FDS Question Form Fields

For any FDS question that requires information to be entered using form fields, click the **"Add"** button for each question to submit the answer. ***See below***.

- Your question information is saved under the **"Responses"** window, located below the appropriate FDS question.
- To edit a response, click the **"pencil"** icon
- To delete your response, click the **"trash can"** icon
- To request information be redacted from public view, click the **"circle slash"** symbol

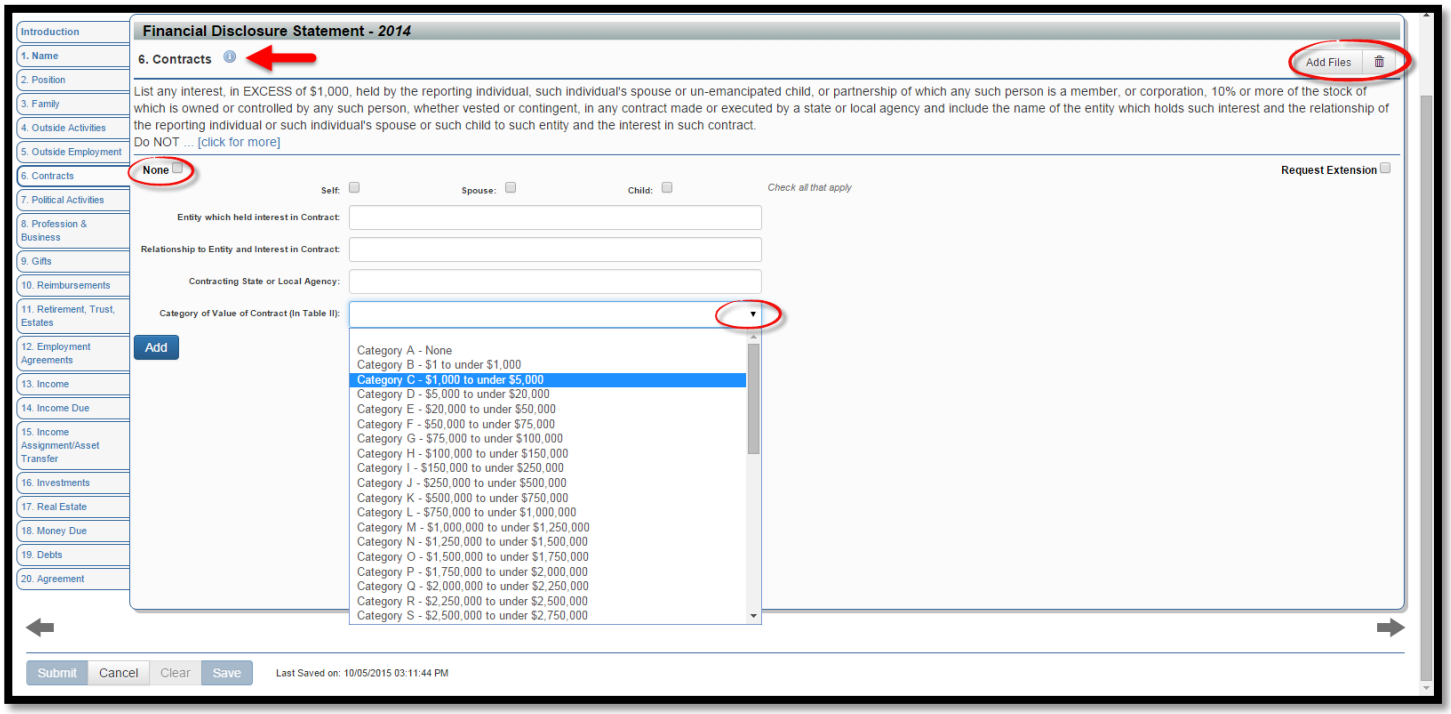


Certain FDS questions allow you the ability to attach documents. To attach a document, click the **"Add Files"** button.

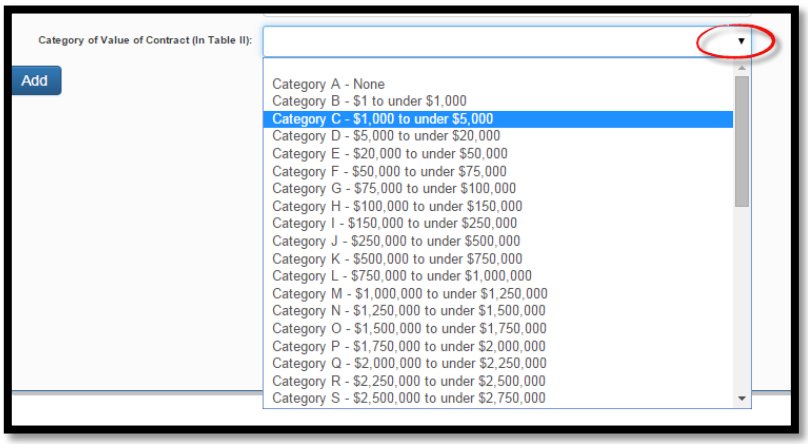
To remove an attachment, click the **"Trash"** icon.

If you need assistance in answering a certain FDS question, click the **"Information"** icon.

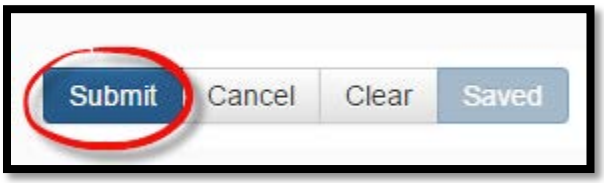
If a question does not apply to you, click the **"None"** check box.



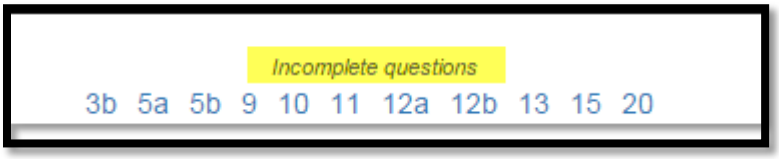
For FDS Questions that require you to disclose certain **"Categories of Value"** click the upside down black triangle to access the **"drop down menu."**



Click **"Submit"** on the lower left of the screen when you have completed the FDS Form.

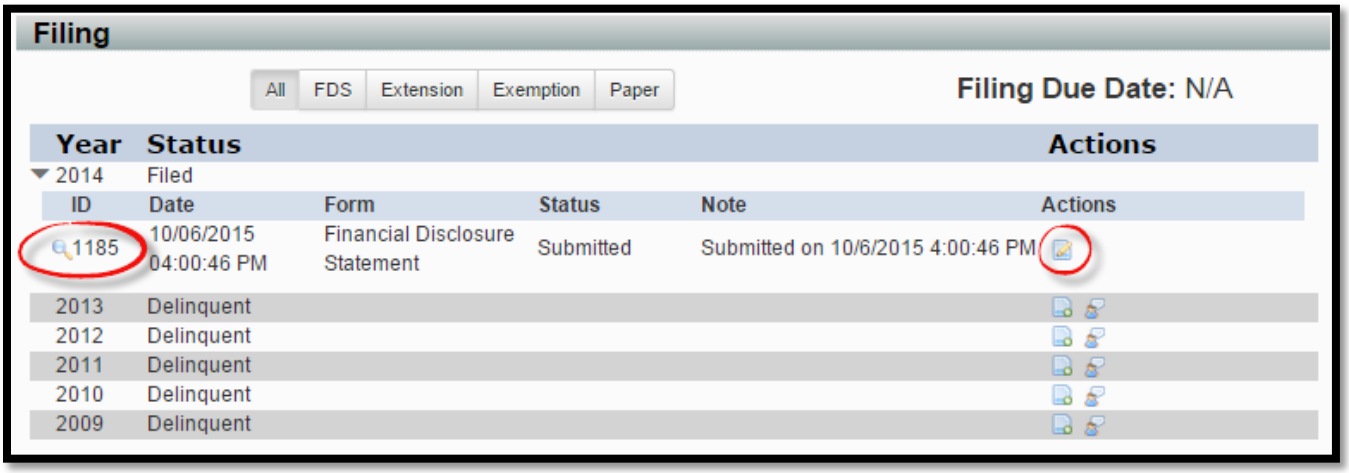


If you are unable to **"Submit"** please verify you have not missed any questions. Missing questions are denoted at the top of your screen.

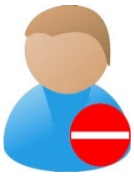


To make changes to an FDS Form once it's been submitted, click the **"amend"** icon under **"Actions"** column

To view a submitted filing, click the **"hour glass"** icon under the **"ID"** column.



To print a submitted FDS Form, click the hour glass, then click the **"print"** symbol located in the upper right hand corner.

Icon Cheat Sheet	
Icon Image	**Meaning and/or Associated Action**
	Request an extension of time from filing your FDS Form
	Submit a new FDS Form
	**Request an Exemption from filing your FDS Form in its' entirety**
	Request additional information when answering specific FDS Form questions
	Amend a previously submitted FDS Form
	Allows you to delete information
	Allows you to edit information
	Print your FDS Form