



NAVIGATING THE FDS ONLINE FILING SYSTEM

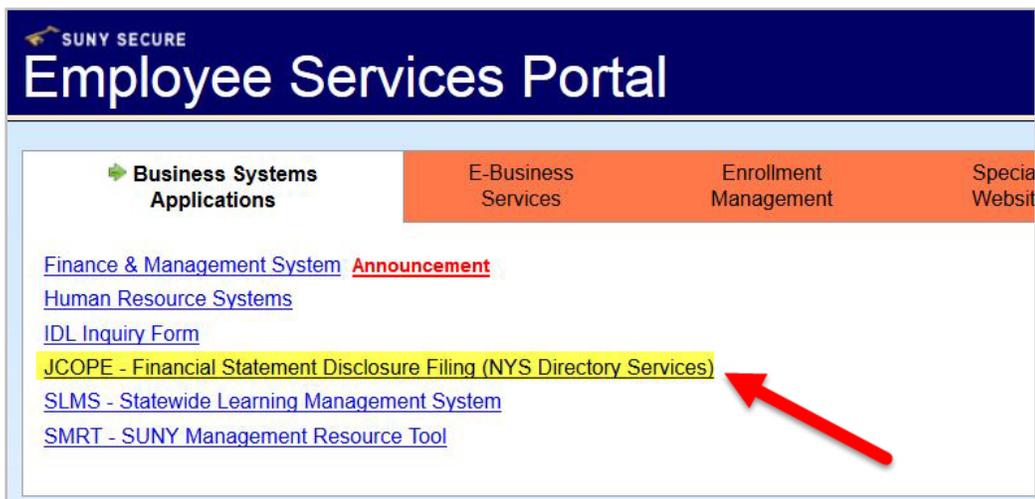
February 2018

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LOGGING IN TO THE JCOPE FDS ONLINE FILING SYSTEM VIA 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.



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



- ➔ If you **have not** 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.

9. 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.

10. 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

Support Contacts

➔ SUNY ID AND SUNY PORTAL

If you do not know your SUNY ID, please first contact your local campus HR department, they will provide you the correct SUNY ID number.

If you have reached out to your campus HR department and the SUNY ID is still reporting as incorrect, or you are having other issues with the security questions on the SUNY portal please contact:

SUNY Customer Services at 518.320.1800 or via e-mail at: Customer.Services@suny.edu

If possible when e-mailing please provide a screenshot of the error you have encountered and the name of the campus you are affiliated with.

➔ JCOPE SITE ISSUES

If you have reached the JCOPE site (anything with a black banner across the top of the browser that says JCOPE – FDS on the left) and are having issues with verification, filing, or looking up past filings, please contact the JCOPE helpdesk: **JCOPE Helpdesk at 518.474.3973 or via e-mail at helpdesk@jcope.ny.gov**

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 5 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 **“Last NamePassword”**
3. Click **“Verify”**

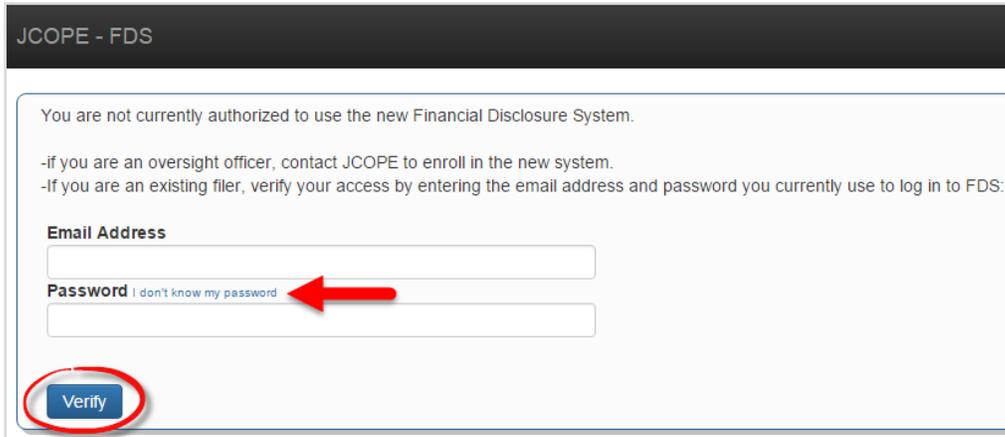
4. A matching record will appear. Click **“Confirm”** to verify, or **“This is not me”** if the information is incorrect.

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



JCOPE - FDS

You are not currently authorized to use the new Financial Disclosure System.

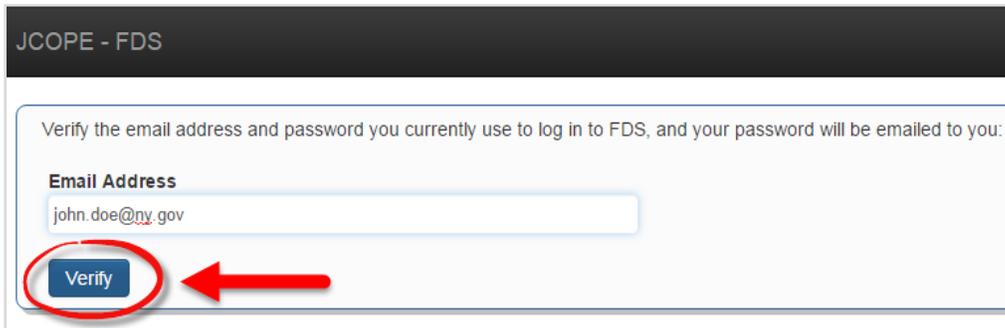
- if you are an oversight officer, contact JCOPE to enroll in the new system.
- If you are an existing filer, verify your access by entering the email address and password you currently use to log in to FDS:

Email Address

Password [I don't know my password](#)

Verify

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



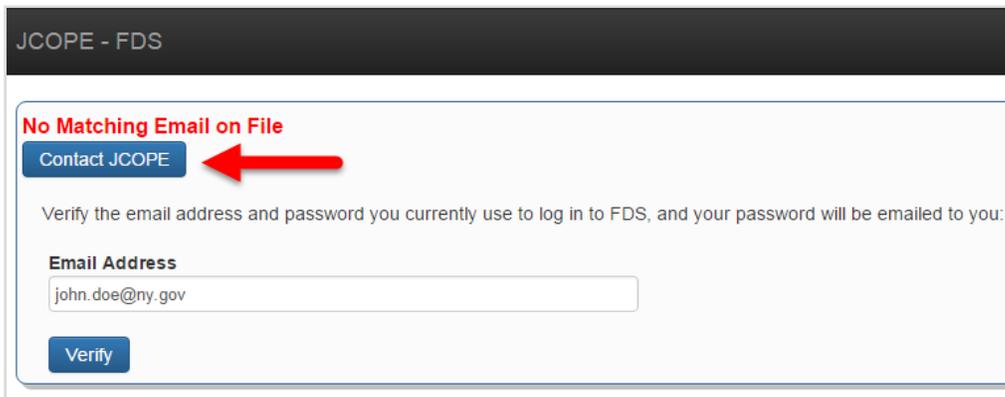
JCOPE - FDS

Verify the email address and password you currently use to log in to FDS, and your password will be emailed to you:

Email Address

Verify

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



JCOPE - FDS

No Matching Email on File

[Contact JCOPE](#)

Verify the email address and password you currently use to log in to FDS, and your password will be emailed to you:

Email Address

Verify

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.

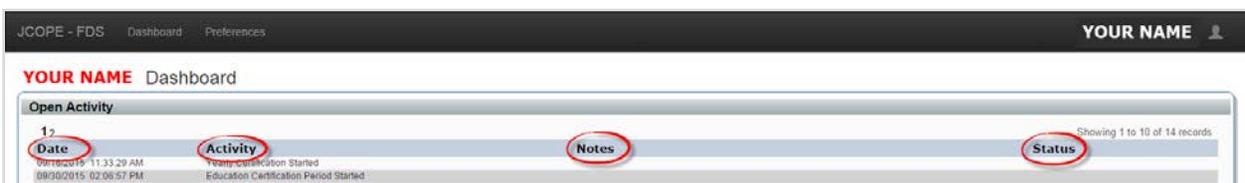
Sub navigation Menu

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 have 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*.



FUNCTIONS AVAILABLE FROM YOUR DASHBOARD

The screenshot shows the JCOPE FDS Dashboard with the following sections and callouts:

- 1**: File FDS dropdown menu.
- 2**: Training section with filters for All, Upcoming, and Complete.
- 3**: Training Extension Request button.
- 4**: Request Individual Exemption button.
- 5**: Filing table with columns for Year, Filing Status, Due, and Actions.
- 6**: Officer table with columns for Name, Agency, Email, Type, and Training.
- 7**: Help button in the top right corner.

1. File a new FDS form by selecting the drop down menu and year.
2. View any upcoming, or completed mandatory ethics training requirements.
3. Request additional time to complete training by clicking the blue **“Training Extension Request”** button.
 - ➔ Once selected, a pop-up window will appear that allows you to enter the reason for the extension. The pop-up also displays which class you are requesting an extension for, and how many requests you have left. Each filer is given two extension requests.
4. Request an **“Individual Exemption”** from filing an FDS in its entirety.
5. View or modify any prior years’ filings. You may also request an **“Extension”** to file your FDS form by clicking the icon under the **“Actions”** column.
6. View your agency **Ethics Officer** contact information
7. Request **“Help”** via e-mail from:
 - ➔ the **JCOPE FDS Help Desk** for assistance on filing your FDS form;
 - ➔ your **Agency’s Ethics Officer** for guidance on ethics-related questions, or to update your training record within the FDS filing system; or
 - ➔ **JCOPE Training Office** for information regarding the mandatory ethics training requirements for FDS Filers.

The screenshot shows the Help Links section with the following buttons and text:

- FDS Help Desk**: Filing Questions
- Agency's Ethics Officers**: Guidance, Update training records
- JCOPE Training Office**: Training Requirements
- Help** button (orange)
- Logout** button (black)

UPDATING YOUR FDS PROFILE

Your online 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.

NYSDS ID	NYS Emp ID	Status
fvanger1	N1212354	Active

Agency Name	Salary	Designation
NYS Council On the Arts (01360)		Policy Maker
Vp Proj Dev, Licensing & Compliance	\$67,054	

Steps to update your FDS Filer Profile – “Filer” section

- Click the grey silhouette located at the top right hand corner of the Main navigation menu
- 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”
- Update your contact information in the appropriate fields
- To save your changes, click “Update Filer”, or
- Click “Clear” to erase all information in the form fields, or
- If you do not want to save your changes to the FDS Filer Profile Click “Cancel”

*NYSDS ID	*NYS Emp ID	*Status	Administrative Hold
fvanger1		Active	<input type="checkbox"/>

*Last	*First	Middle Initial
fvanger	Falls	

*Street
1802 Central St

*City	*State
Troy	NEW YORK

*Zip	*Country
45390	UNITED STATES

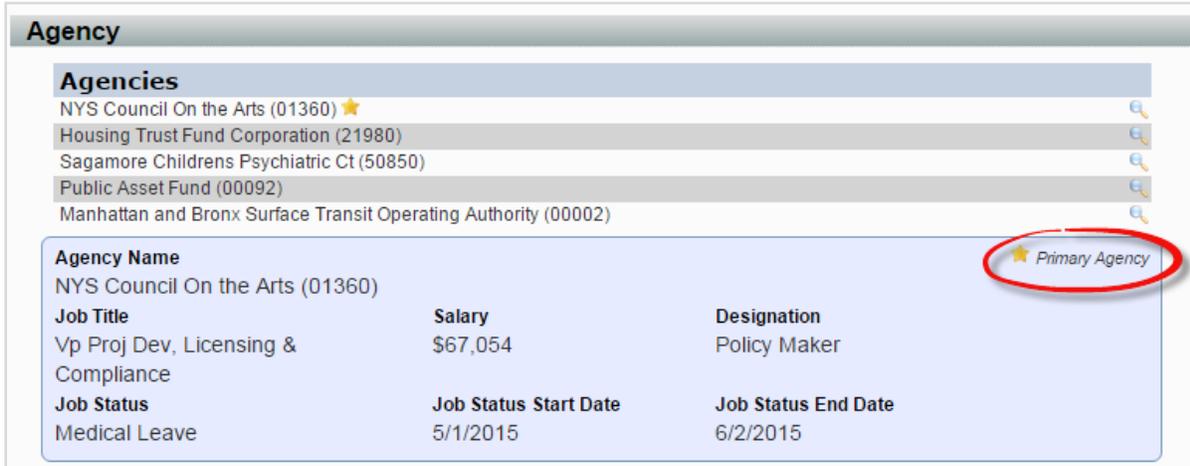
*Email
fvanger@nyc.gov



PRO TIP: 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.

“Agency” Section

- 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. 



Agency		
Agencies		
NYS Council On the Arts (01360) ★		
Housing Trust Fund Corporation (21980)		
Sagamore Childrens Psychiatric Ct (50850)		
Public Asset Fund (00092)		
Manhattan and Bronx Surface Transit Operating Authority (00002)		
Agency Name		
NYS Council On the Arts (01360) ★ Primary Agency		
Job Title	Salary	Designation
Vp Proj Dev, Licensing & Compliance	\$67,054	Policy Maker
Job Status	Job Status Start Date	Job Status End Date
Medical Leave	5/1/2015	6/2/2015

VIEWING AND FILING YOUR FINANCIAL DISCLOSURE STATEMENT

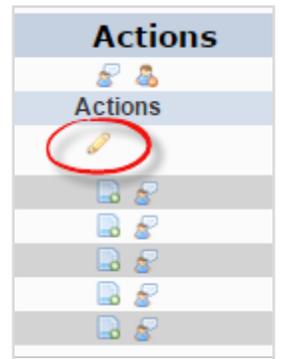
The online filing system allows you to view, edit, or file a new Financial Disclosure Statement from the following areas within the online application:

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. 

Filing						
All FDS Extension Exemption Paper					Filing Due Date: N/A	
Year	Status		Actions			
▼ 2014	In Progress		ⓘ ⓘ			
ID	Date	Form	Status	Note	Actions	
1185	10/05/2015 03:11:44 PM	Financial Disclosure Statement	In Progress	Missing: 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20		
2013	Delinquent		ⓘ ⓘ			
2012	Delinquent		ⓘ ⓘ			
2011	Delinquent		ⓘ ⓘ			
2010	Delinquent		ⓘ ⓘ			
2009	Delinquent		ⓘ ⓘ			

Steps to file your Financial Disclosure Statement

Introduction
1. Name
2. Position
3. Family
4. Outside Activities
5. Outside Employment
6. Contracts
7. Political Activities
8. Profession & Business
9. Gifts
10. Reimbursements
11. Retirement, Trust, Estates
12. Employment Agreements
13. Income
14. Income Due
15. Income Assignment/Asset Transfer
16. Investments
17. Real Estate
18. Money Due
19. Debts
20. Agreement

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.

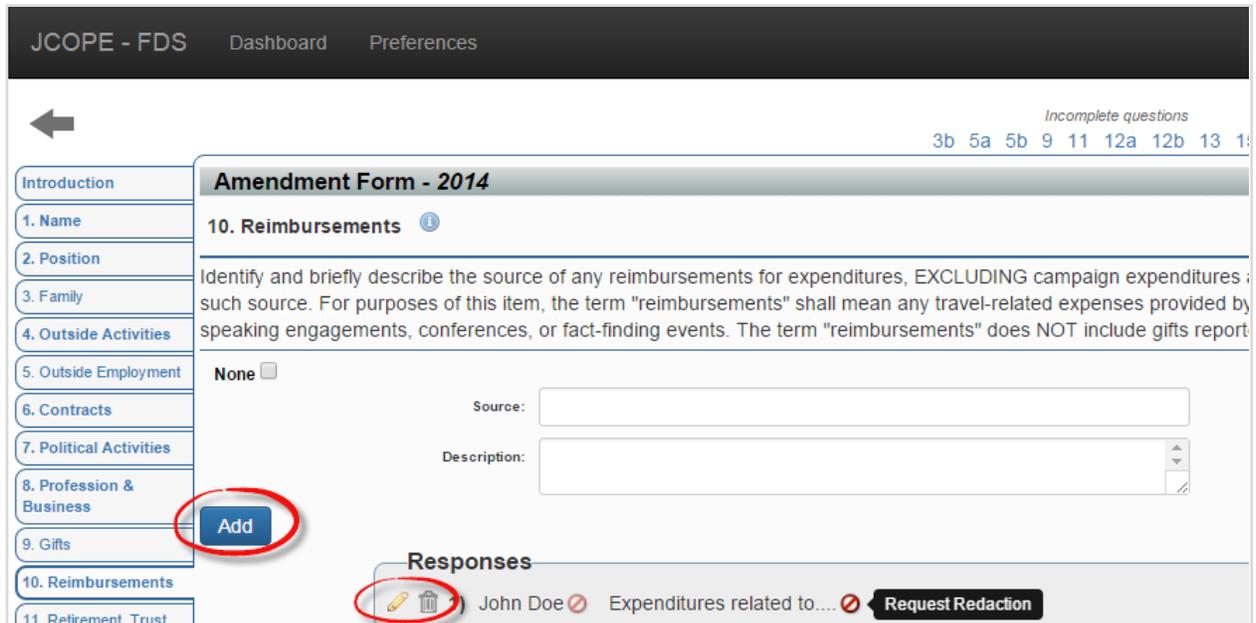


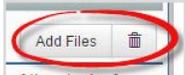
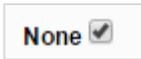

PRO TIP: Scroll your mouse over the “circle-backslash symbol” to view what information within each question field is automatically redacted from public view, and what areas of information you can request to have redacted. Click the “circle backslash” symbol to request certain information be removed from 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”** 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 located at the upper right hand corner of the screen. 
- 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.”**

Category of Value of Contract (In Table II):

Add

- Category A - None
- Category B - \$1 to under \$1,000
- Category C - \$1,000 to under \$5,000**
- Category D - \$5,000 to under \$20,000
- Category E - \$20,000 to under \$50,000
- Category F - \$50,000 to under \$75,000
- Category G - \$75,000 to under \$100,000
- Category H - \$100,000 to under \$150,000
- Category I - \$150,000 to under \$250,000
- Category J - \$250,000 to under \$500,000
- Category K - \$500,000 to under \$750,000

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

Submit Cancel Clear Saved

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

Incomplete questions

3b 5a 5b 9 10 11 12a 12b 13 15 20

- 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.



Filing					
All FDS Extension Exemption Paper					Filing Due Date: N/A
Year	Status				Actions
▼ 2014	Filed				
ID	Date	Form	Status	Note	Actions
1185	10/06/2015 04:00:46 PM	Financial Disclosure Statement	Submitted	Submitted on 10/6/2015 4:00:46 PM	
2013	Delinquent				
2012	Delinquent				
2011	Delinquent				
2010	Delinquent				
2009	Delinquent				

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