

SCHOOL DISTRICT JURISDICTIONAL CONTACT GUIDE

Oregon Government Ethics Commission
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DISCLAIMER

This training material is issued by the Oregon Government Ethics Commission (OGEC) pursuant to ORS 244.340 Continuing Education Program. This resource is intended for educational and training purposes only and should not be used as a substitute for a review of the specific statues and rules. There may be other laws or regulations not within the jurisdiction of OGEC that apply to actions or transactions described in this training material. Do not reproduce or distribute without the express written permission of OGEC.

STATUTORY REQUIREMENTS

In 2022, the Legislature passed House Bill 4114, which requires "every member of the district school board of a common school district or union high school district" to be included in the list of public officials outlined in ORS 244.050 that are required to file an Annual Verified Statement of Economic Interest.

JURISDICTIONAL CONTACT STATUTORY REQUIREMENTS

The following statutory references and administrative rules provide the basis for the responsibilities of the Jurisdictional Contact (JC).

Information provided to persons required to file statements of economic interest. (ORS 244.162)

A person designated by a public body as defined in ORS 174.109 shall provide information explaining the requirements of ORS 244.050, 244.060, 244.070 and ORS 244.090 to each newly elected or appointed public official serving the public body who is required to file a verified statement of economic interest under ORS 244.050.

Identification of Public Officials Required to File Annual Verified Statements of Economic Interest (SEI) (OAR 199-020-0005)

Cities, counties, and those state boards and commissions, special districts and others affected by the filing requirements of ORS 244.050 shall inform the Oregon Government Ethics Commission of certain information related to individuals required to file an Annual Verified Statement of Economic Interest (SEI). The information shall be reported to the Commission via its Electronic Filing System (EFS), which is accessed through the Commission's website: https://www.oregon.gov/ogec. The website also contains training on EFS for all users. Any questions concerning electronic filings should be directed to mail@ogec.oregon.gov or by phone to 503-378-5105.

1) Each public body shall provide in writing to the Commission the name, title, mailing address, phone number and e-mail address of a person to act as their jurisdictional contact (JC) on or before February 15. Any changes to the JC's identity or contact information shall be updated by the public body in the Commission's EFS within ten business days.

2) Each designated JC shall update the Commission's EFS no later than each February 15 with the name, position or office held and the email address of each individual required to file an SEI. Any subsequent changes, additions or deletions of this information that occurs before April 15 must be made by the JC in EFS within three business days.

NOTE: *All updates are to be completed online by the JC using EFS.*

TRAINING

JURISDICTIONAL CONTACTS (JC)

JCs can participate in live, online trainings presented by OGEC training staff. Learn about your responsibilities to instruct filers about their filing requirements and how to update the account information. These training sessions also offer a refresher course on how to manage the positions within the jurisdictions assigned to you.

For those looking for written instructions, OGEC has created a Jurisdictional Contact Guide.

Registration for trainings, Guides, and video tutorials, can be found at OGEC's website on the Jurisdictional Contact Training page.

STATEMENT OF ECONOMIC INTEREST (SEI) FILERS

OGEC staff provides annual live webinars for SEI filers. This webinar is for those new to filing a SEI as well as those just needing a refresher. Some participants find it helpful to login and work on their statement while in the training.

OGEC has created a SEI Filer Guide with written instructions for filers on how to file.

There is also a video tutorial available to guide filers in creating and setting-up their account profiles in EFS.

More information can be found on OGEC's website on the SEI Filer Training page.

IMPORTANT DATES

- **February 15** = JCs must have their jurisdiction's list current and have verified
- **March 15** = SEI filing period opens
- **April 15** = SEI due date

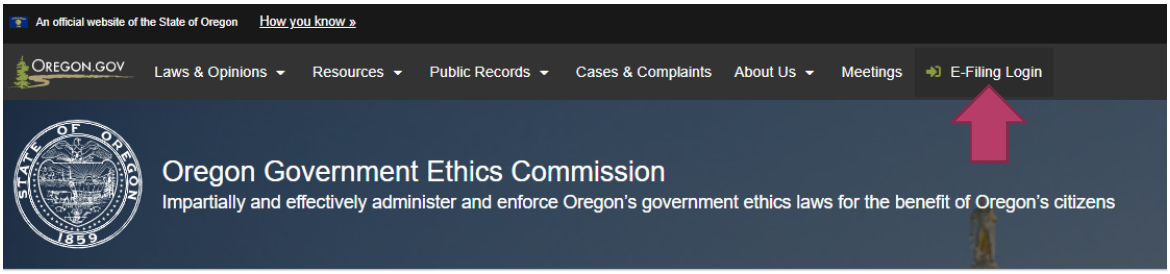
HOW TO GET STARTED

NOTE: *OGEC has created accounts for all School District Jurisdictional Contacts. These Jurisdictional Contact (JC) accounts will stay with the school district. If you have another Electronic Filing System (EFS) account, you will use a separate username and password to login as the JC. If someone else in your school district takes over these responsibilities, the account will need to be updated with their contact information.*

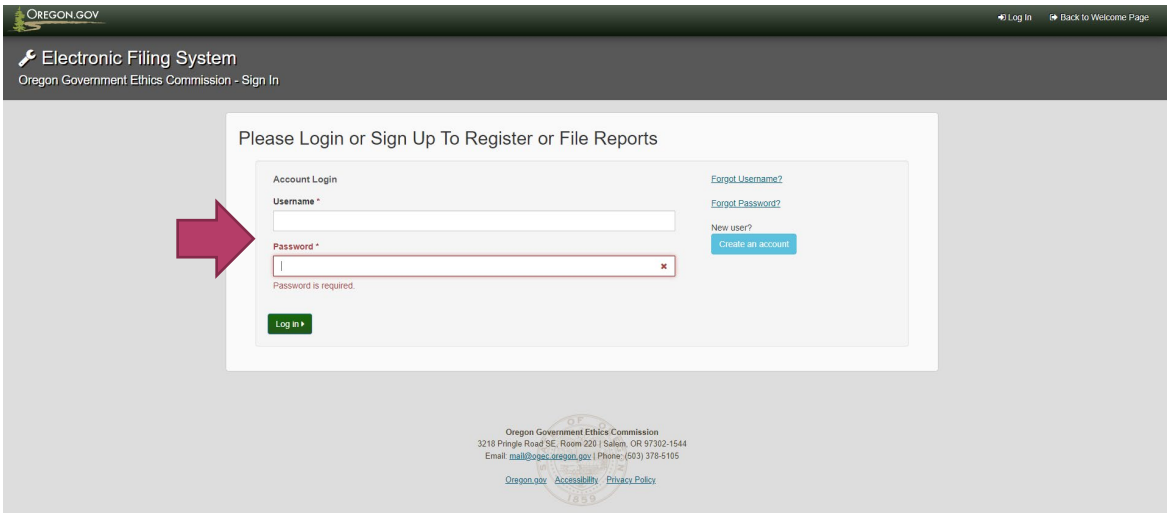
LOGIN

NOTE: *You will need to update your contact information in your account after logging in for the first time.*

1. Go to OGEC's website www.oregon.gov/ogec
2. Click on E-Filing Login at the top right of the screen

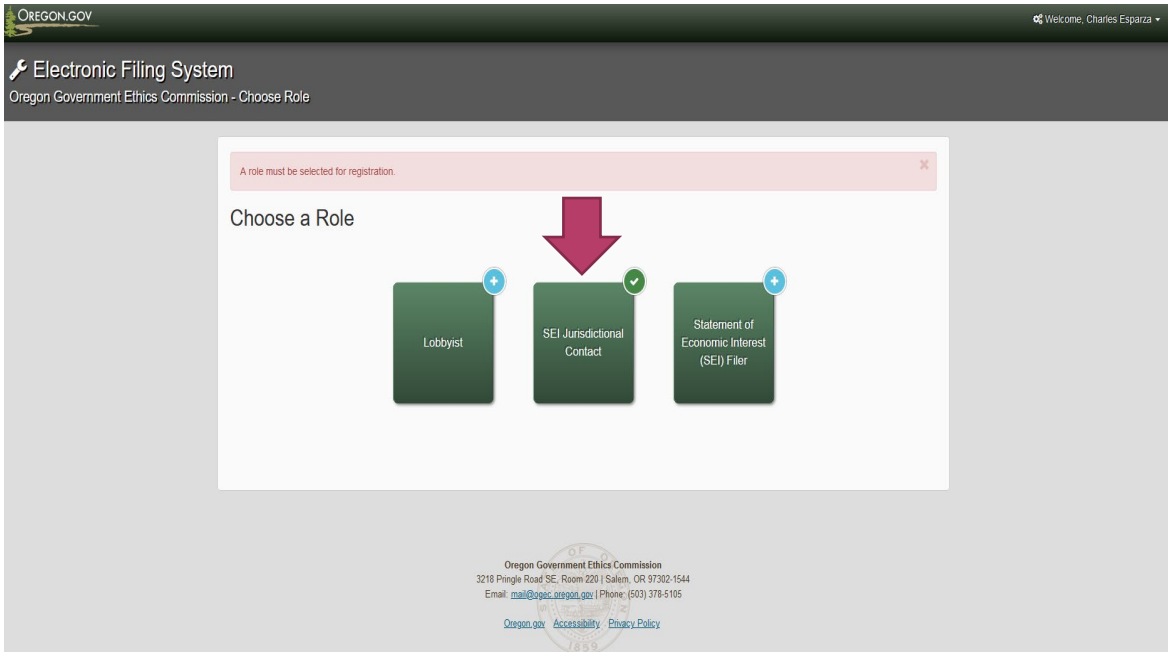


3. You will be re-directed to the Electronic Filing System (EFS) login page



4. Enter your login information provided to you by OGEC staff and click on the green "Log in" button.

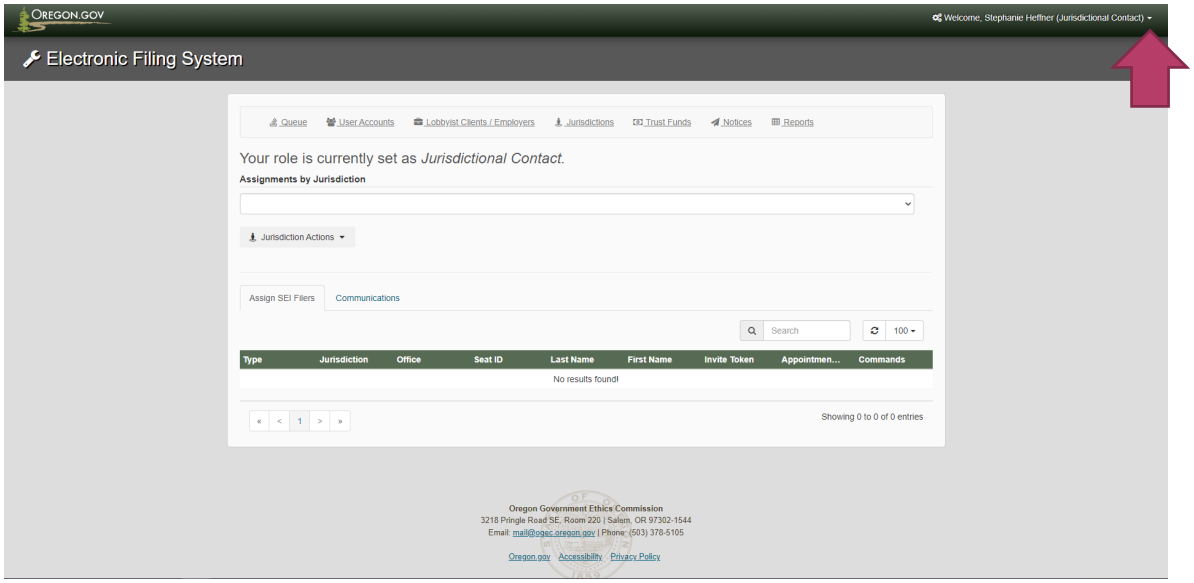
5. Click on the “SEI Jurisdictional Contact” Role.



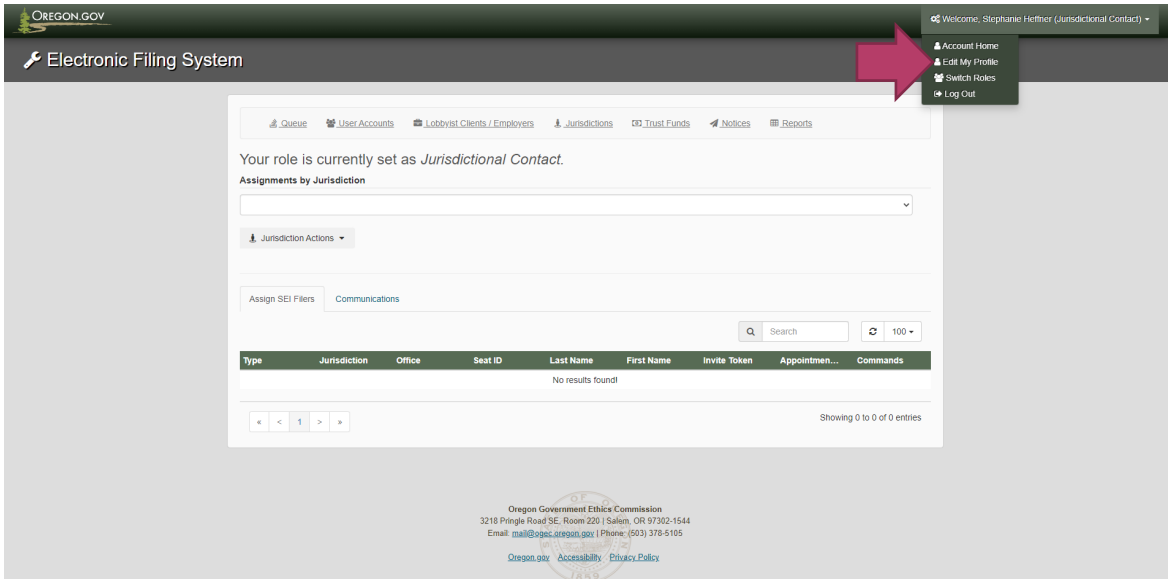
UPDATING ACCOUNT CONTACT INFORMATION

You are now in your Jurisdiction’s account. You will need to update your information in the account.

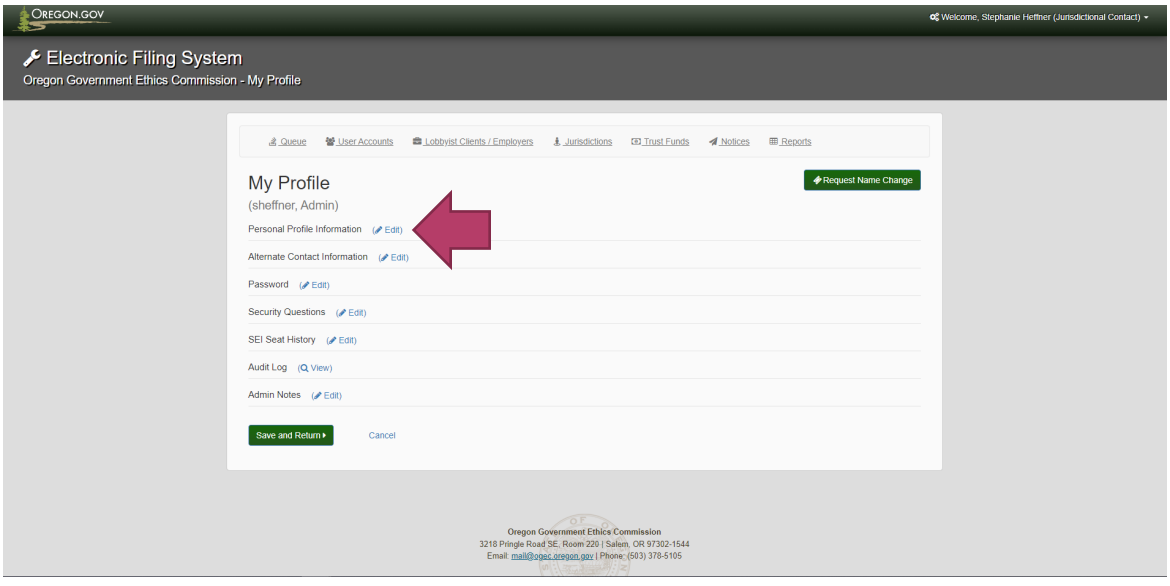
1. Click on the down arrow next to the Welcome, First Name Last Name (Jurisdictional Contact) line on the upper right hand side of the screen.



2. A drop down menu will appear. Click on “Edit My Profile”

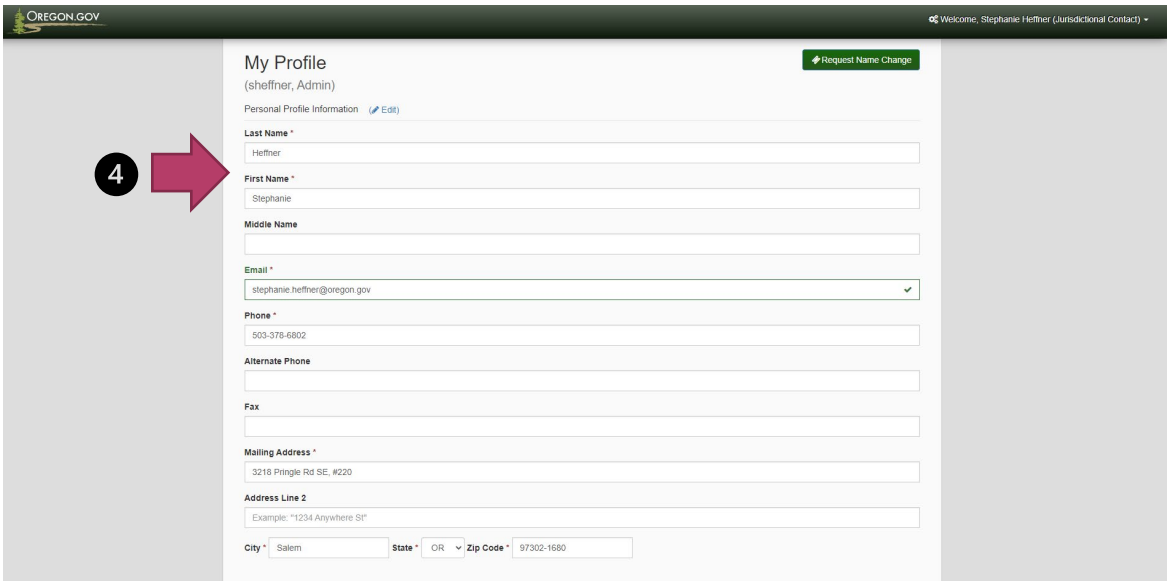


3. In “My Profile” Click on the “Edit” next to Personal Profile Information



4. Update your profile information. Please make sure your name, email, phone number, and mailing address are correct.

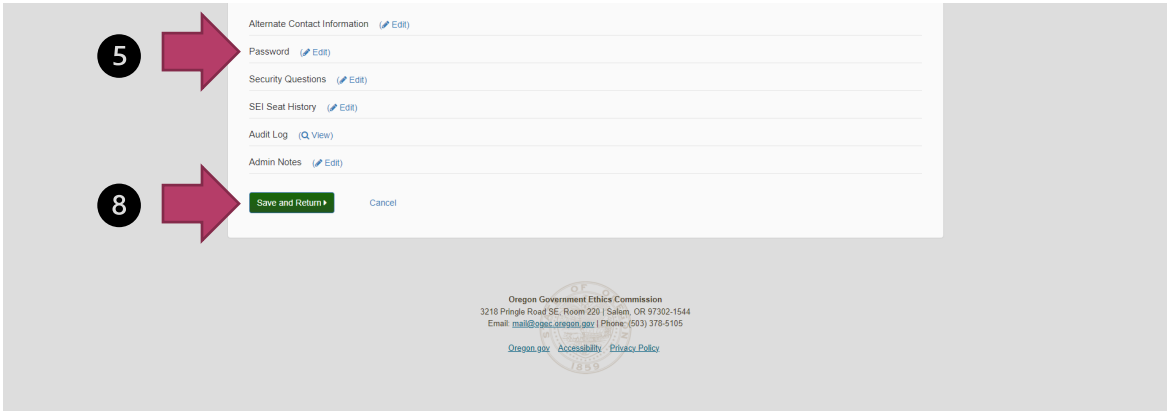
NOTE: *Do not click on the green "Request Name Change Button". This is not used to update your account information.*



5. Password: **Do not forget to change your password**. Passwords must have a minimum of:

- ✓ One upper case letter
- ✓ One lower case letter
- ✓ One numerical digit
- ✓ One special character (*See text help for special character list)*
- ✓ Must be at least 8 and not more than 20 characters long

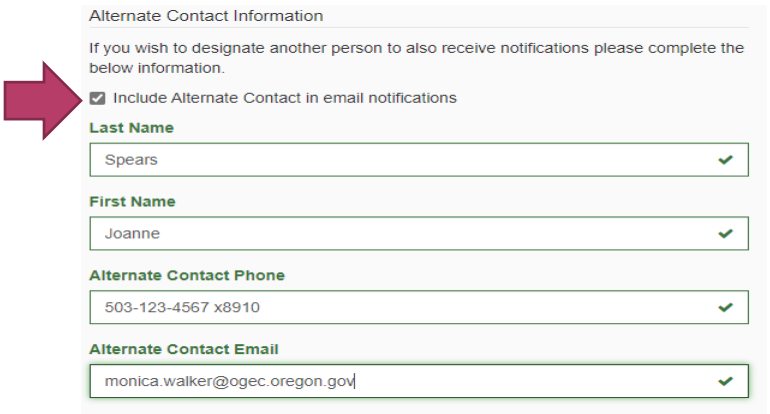
NOTE: *We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.*



6. Security Questions: These are used for password retrieval purposes. The security questions are **case and space sensitive**. If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.

7. Alternate Contact Information: You have the option to identify an alternate contact person to receive the same system-generated email notifications that you will receive.

   FIRST: Be sure to check the box to include the designated alternate contact in email notifications. Then you can enter the contact's information. If you do not check the box first, they will not receive copies of the emails.



   It is recommended that you list an alternate contact to ensure that important dates are not missed, and tasks are completed on time.

8. Save and Return: Click on this green button when you have finished updating your account information.

NOTE: *You can only edit your own personal contact information. You cannot update your First or Last Name. If you will no longer be the JC for your district, please contact OGEC staff before you leave to ensure the account is transitioned to your replacement before leaving.*

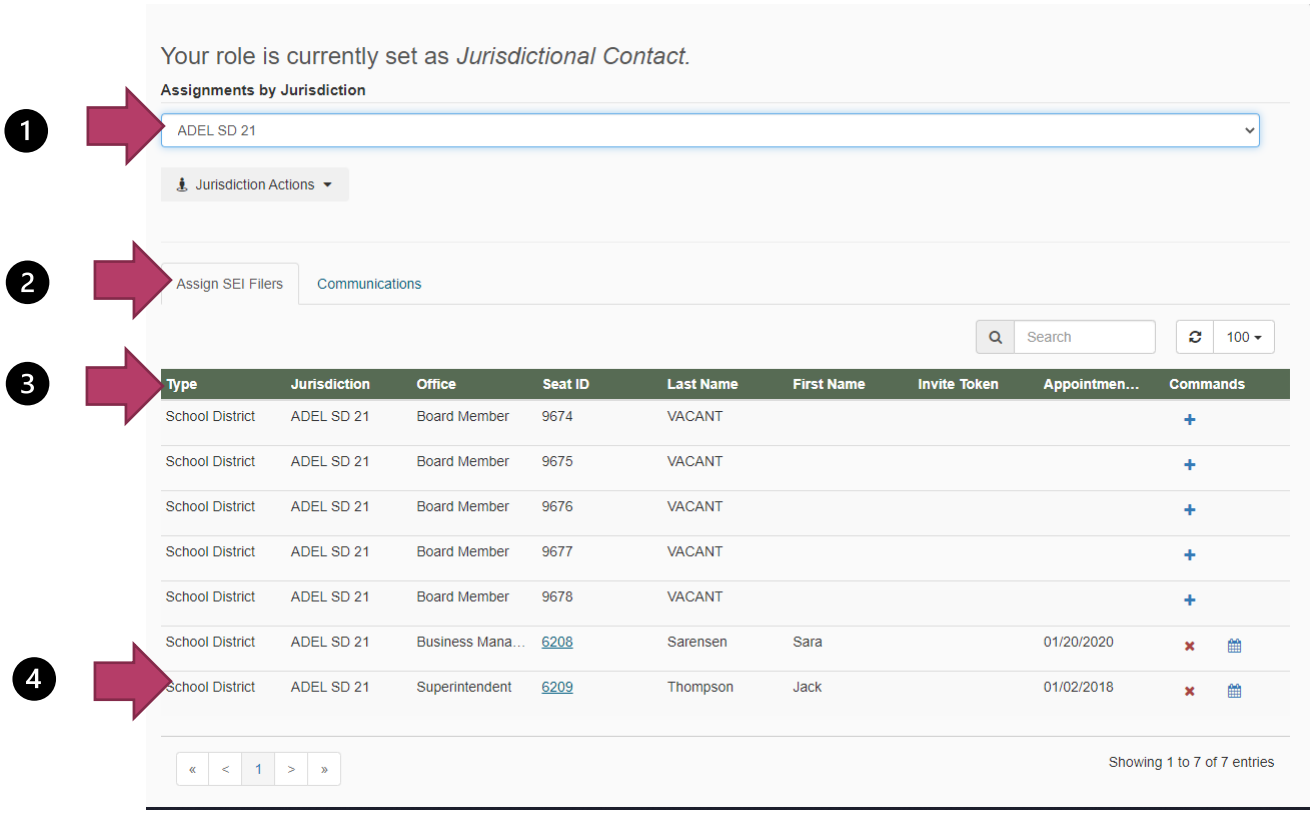
YOUR JURISDICTION LIST

1. Under the "**Assignment by Jurisdiction**", verify that the correct jurisdiction is in the display.

2. The system will default to the "**Assign SEI Filers**" tab. If you are in the Communications tab, click on "Assign SEI Filers" tab.

3. You will see the list of the offices required to file an SEI in your jurisdiction. If you have any questions regarding these specific seats or need to make changes to the actual seats in your jurisdiction, please contact OGEC staff. Example: your district changes the total number of school district seats.

4. Superintendents and Business Managers (Deputy Clerks) have been required to file an SEI for quite some time. Please make sure that the individuals listed in these seats are current. If you need to make changes, please go to the "Updating SEI Filers" section. All school board member seats should be vacant the first time you login. These seats are all identical in our system. The Seat ID does not have any meaning.



COMMANDS FEATURES

In EFS, you can hover over the icons in the Commands column to see the function of each icon.

The calendar icon is there to allow you to change the date of appointment. If the individual is re-elected/appointed, the calendar will allow you to enter that new date. ***NOTE:*** *If this individual is beginning a consecutive term with no break in service,* ***DO NOT*** *change the original assignment date.*

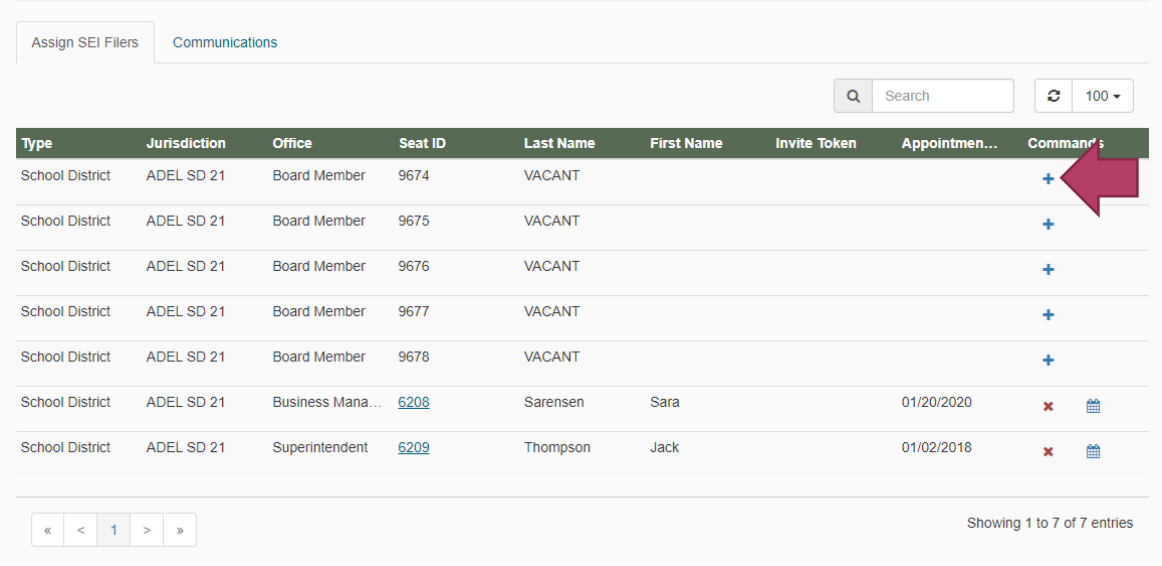
The "Plus" icon allows you to assign an individual to a vacant seat.

The "Cross" icon allows you to vacate a seat.

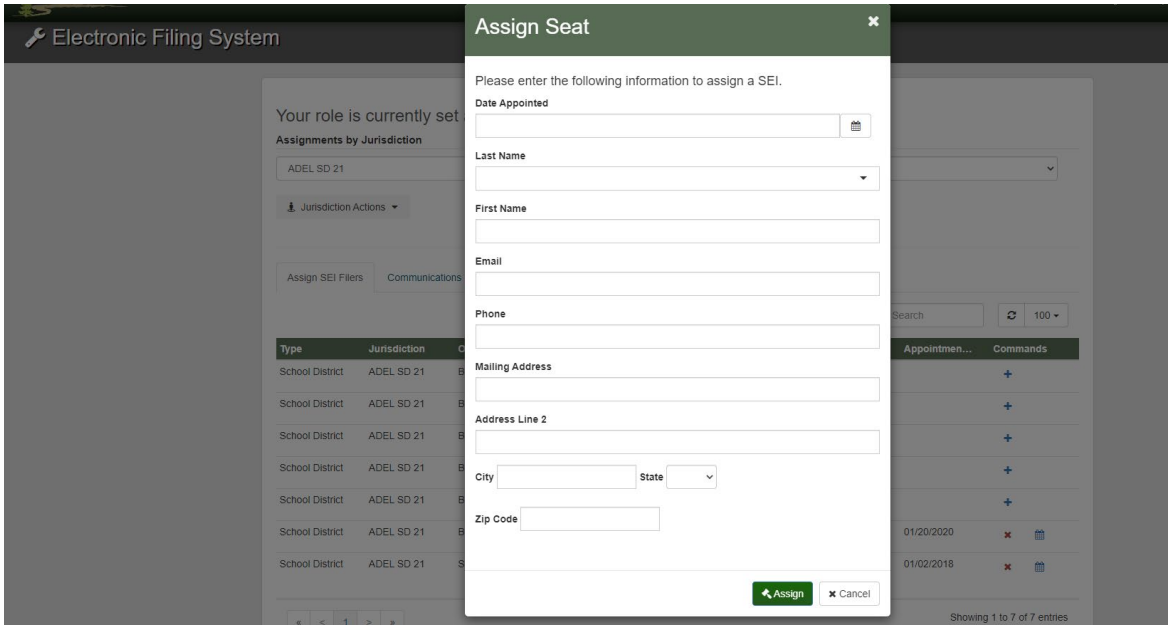
The "No" icon allows you to cancel an invite.

ASSIGN VACANT SEATS

1. You can only assign people to vacant seats. To assign someone to a vacant seat, select the ✚ under the Commands column that corresponds to the row that needs to be assigned.



A new window will pop-up, “Assign Seat”.



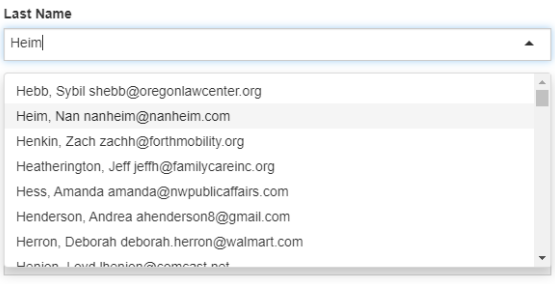
1. Date Appointed: Select the date of appointment using the calendar icon.
   Current school board members’ appointment date: January 1, 2023
   If this is not done correctly, this will cause the system to charge school board members penalties!

   For **newly elected school board members** after 1/01/23, enter the actual date of appointment.

2. Last Name: Key in the last name of the appointed individual.

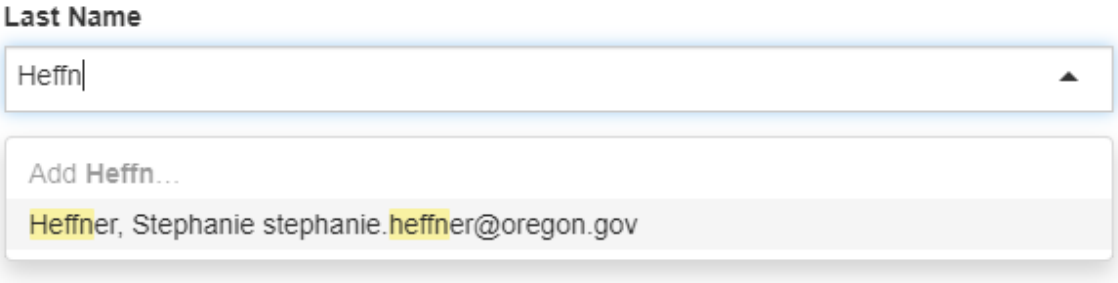
   Note: All registered filers with the same last name will appear in a dropdown list. Scroll through the names to see if the individual already has an account.

   Example:



   - If they DO appear, click on the name, and then confirm that the email address and prefilled information matches your filer before “Assigning” them to the seat.

- If they DO NOT appear in the list, select the “Add” option at the top of the list.



3. First Name: Enter first name of filer.

4. Email Address: It is important to confirm the accuracy of the email address for each filer. Please enter the email address that the filer actually checks. It does not need to be the email associated with their position but can be their personal email. ***NOTE:*** *Do not use upper case letters.*

5. Phone Number: Enter the phone number for the filer.

6. Mailing Address: Enter the Street/PO Box, Ste/Rm/Apt. #, City, ST, Zip Code

   NOTE: *The system has two lines for street address. Only use the first line for street address, PO Box AND the Ste/Rm/Apt #.*

7. Once you have entered the information, click on the green “**Assign**” button at the bottom of the screen.

   A system-generated email will be sent to the individual, advising them to create their personal profile account. The Invitation Token is valid for **90 days**. If they do not create their personal profile account within 90 days, a new Invitation Token will need to be created. See Invitation Token section.

   NOTE: *It is your responsibility to reach out to each filer who has not created their account before March 15. If they have not created their accounts, they will not receive email notifications from OGEC. See Token ID section for information on how to see who in your jurisdiction still needs to create an account.*

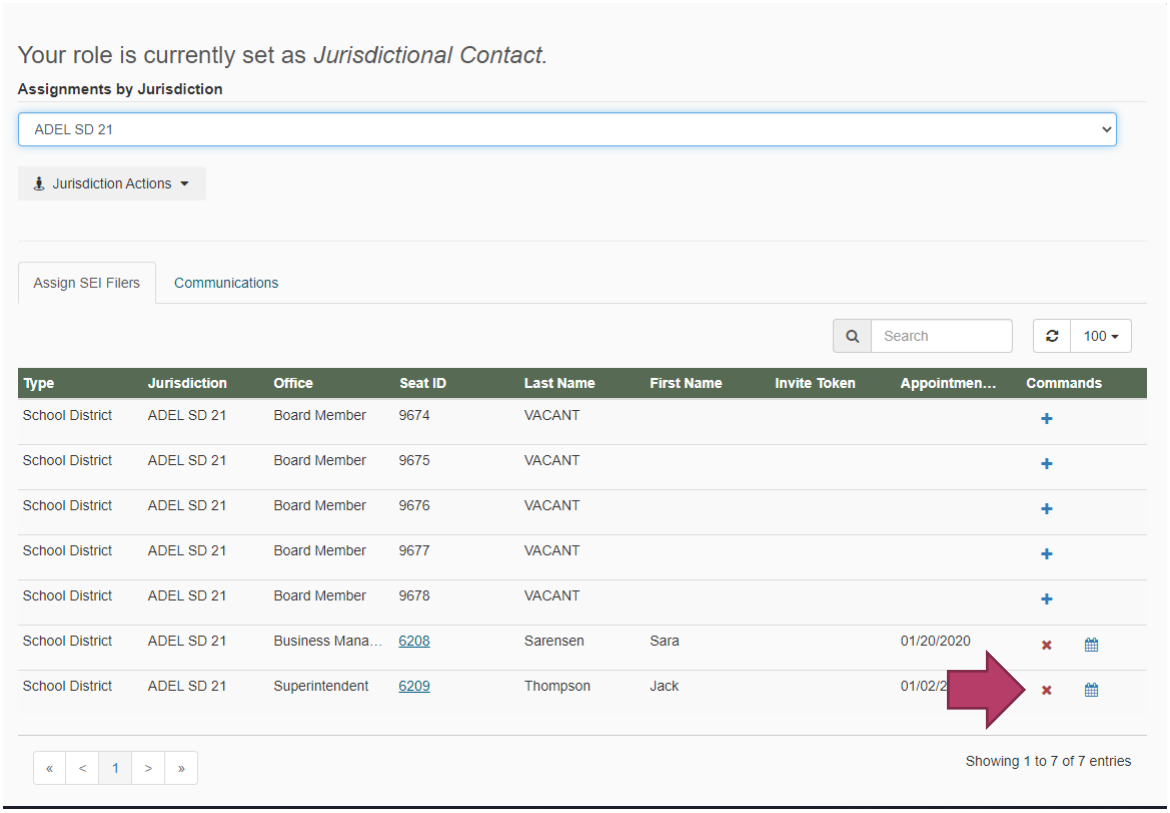
UPDATING SEI FILERS

The JC is responsible for making sure the list of public officials required to file an SEI in their school district is up to date. When someone leaves a position, their role must be

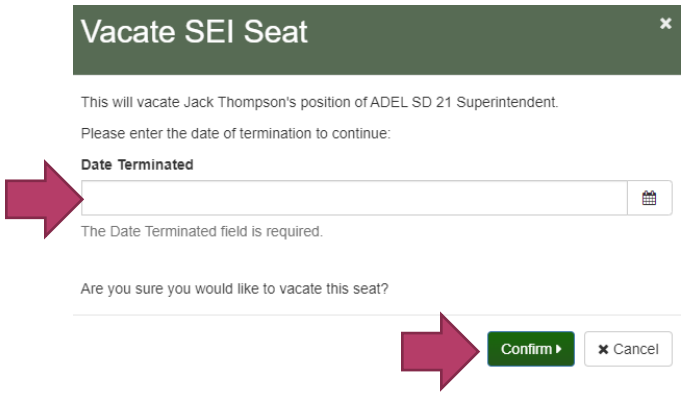
terminated in EFS to vacate the seat. Once the seat has been vacated, you can now seat the new person.

To Vacate Current SEI Filers' Seats

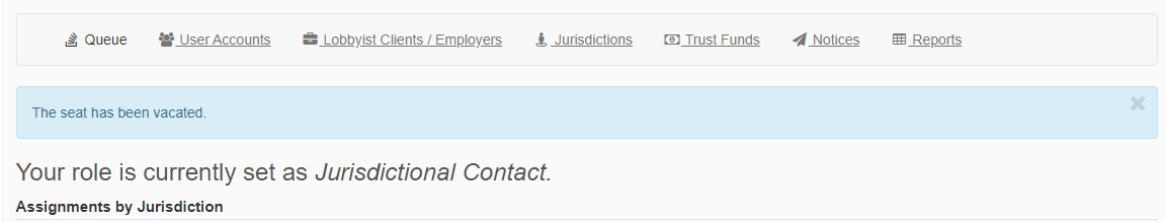
1. Under the Command column, click on the ✖ in the corresponding role for the seat you want to vacate.



2. Date Terminated: Click on the calendar icon to select the date of the person's last day in this role.
3. Click on the green "Confirm" button.



4. You will be taken back to the main screen. The seat will now be vacated.



NOTE: *This will trigger an automatic email to be sent to the SEI filer you have just removed. If the position is vacated prior to April 15, the filer is not required to file an SEI (see example email below). If the seat is vacated after April 15, the filer is required to file a SEI for the previous year.*

Example: If the filer left position on April 16, 2023, they were required to file a SEI for 2022 by April 15, 2023.

From: ogec.notification@egov.com <ogec.notification@egov.com>

Sent: Monday, November 7, 2022 1:29 PM

To: SEI FILER

Cc: Alternate Contact

Subject: Cancelation of SEI Seat Assignment Without Filing

Dear (Name of SEI Filer):

Our records indicate that you held one or more position(s) identified in ORS 244.050 that required the filing of a Statement of Economic Interest (SEI) during 2022.

5. You can now add the new person serving in that role to the seat.

TOKEN ID / REGISTRATION CODE

The Invite Token is a system-generated confirmation code. It is unique to each filer you add to the jurisdiction. The Invite Token will only show in your list for filers who have not yet created their personal accounts.

The “Invite Token” is listed under the Invite Token column in the corresponding row for the person who has not yet created their account.

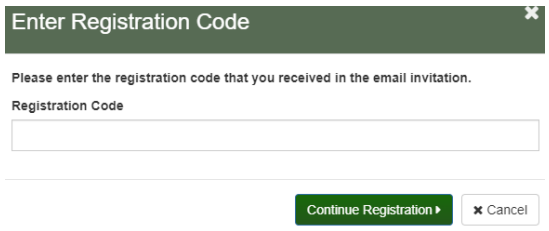
Type	Jurisdiction	Office	Seat ID	Last Name	First Name	Invite Token	Appointment Date	Commands
City	YONCALLA	COUNCIL	5414	Cox	Carl	JC2XHC7	08/10/2021	⊘

The Invite Token is embedded in the link in the email invitation to create a profile that filers receive once you have added them to your jurisdiction. When a filer creates their account using this link, their account will automatically be linked to your jurisdiction and the Invite Token will no longer show in the column.

You will need to make sure there are no outstanding Invite Tokens in your jurisdiction by **March 15.** If filers still have an Invite Token listed, they have not created an account and they are not registered. They **WILL NOT** receive notification emails with instructions on how to file their SEI.

REGISTRATION CODE- INSTRUCTIONS FOR SEI FILERS

If the SEI filer creates an account without using the link they received in the email, they will be prompted to enter a registration code. **The Registration Code and the Invite Token are the same thing.** The filer will need to contact the JC to get the Registration Code/Invite Token.

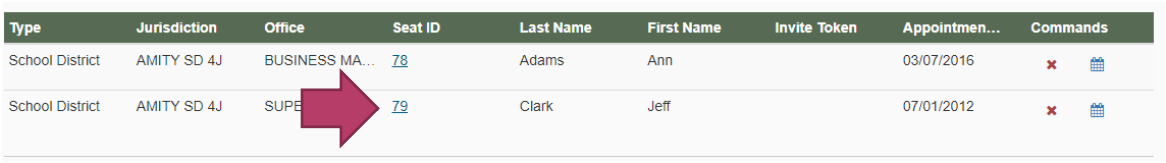


1. Registration Code: Enter the Invite Token.
2. Continue Registration: Click on green Continue Registration button.
3. Filers will now be able to enter their contact information, set-up their password, security questions, and assign an alternate contact.

NOTIFICATIONS & DEADLINES

JCs are responsible for assisting SEI filers in creating their profiles and setting-up their accounts within EFS.

To ensure receipt of important reminders from OGEC, it is recommended that JCs periodically login to EFS to review the contact information listed for SEI filers in their jurisdiction. You can view a filer's information, by clicking on the corresponding Seat ID.



Type	Jurisdiction	Office	Seat ID	Last Name	First Name	Invite Token	Appointmen...	Commands
School District	AMITY SD 4J	BUSINESS MA...	78	Adams	Ann		03/07/2016	
School District	AMITY SD 4J	SUPE	79	Clark	Jeff		07/01/2012	

This will give you the filers assignment information, date appointed, name, email, phone, and mailing address in a pop-up window.

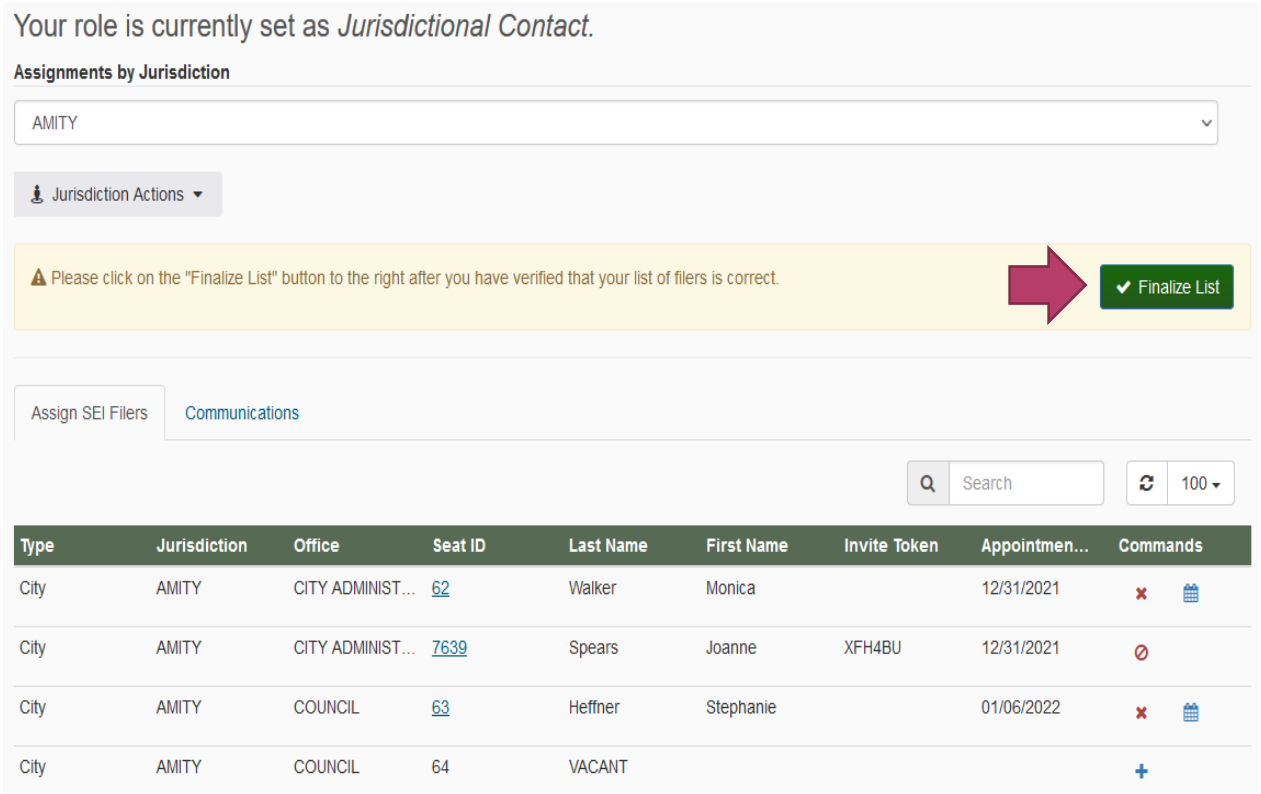
If a filer needs to update their information, the JC will not be able to update it. The JC will need to reach out to the filer to remind and assist the filer in updating their own information in their account.

JCs are encouraged to review and maintain all information listed for their jurisdiction throughout the year so that all EFS records are current and accurate year-round.

Annual Requirements

Annually, on **February 1st**, JCs receive an email notification reminding them to verify that the jurisdiction's listing is accurate in EFS. JCs must verify that they have updated this listing by **February 15th** of each year. Any changes, additions or deletions of information that occur after the February 15th deadline and prior to April 15th must be made in EFS **within three (3) working days**.

1. Review list and make any necessary changes.
2. Finalize List: Click on the "Finalize List" button.

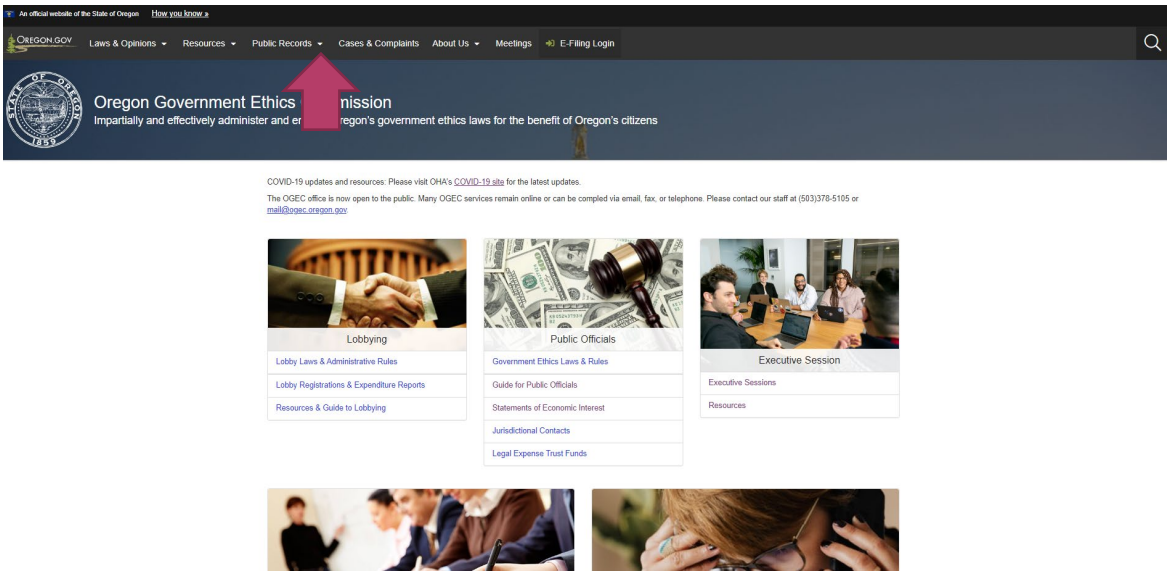


Type	Jurisdiction	Office	Seat ID	Last Name	First Name	Invite Token	Appointmen...	Commands
City	AMITY	CITY ADMINIST...	62	Walker	Monica		12/31/2021	
City	AMITY	CITY ADMINIST...	7639	Spears	Joanne	XFH4BU	12/31/2021	
City	AMITY	COUNCIL	63	Heffner	Stephanie		01/06/2022	
City	AMITY	COUNCIL	64	VACANT				

HOW TO LOOKUP WHO HAS FILED SEI

The JC will want to check to see who has completed the SEI periodically between March 15 – April 15. You need to reach out to SEI filers in your jurisdiction BEFORE April 15th to remind anyone who hasn't filed.

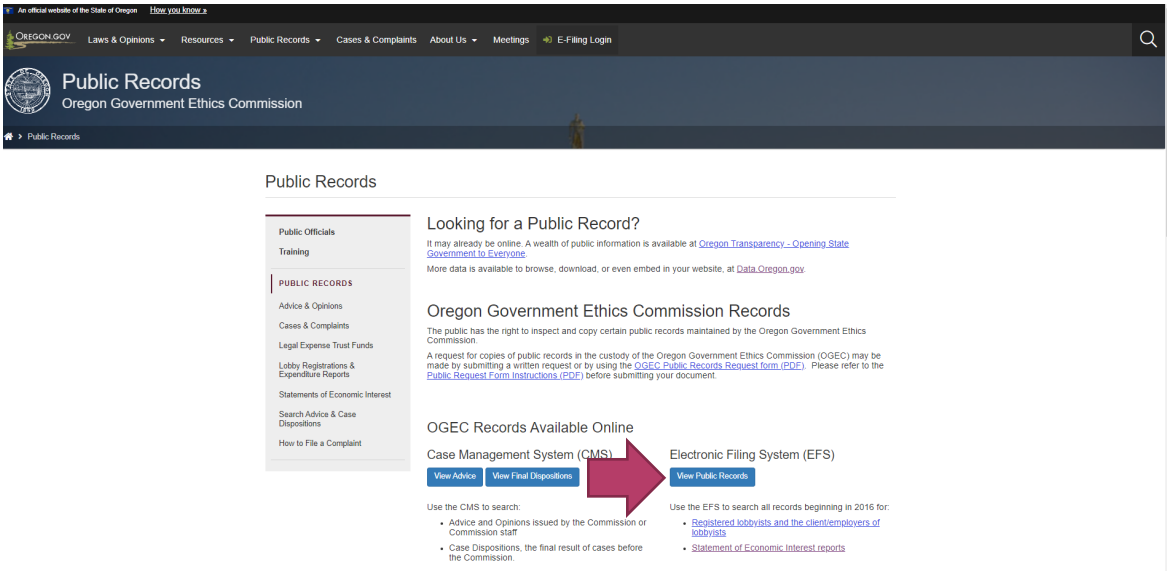
1. Go to www.oregon.gov/ogec
2. Click on Public Records section in the top menu bar



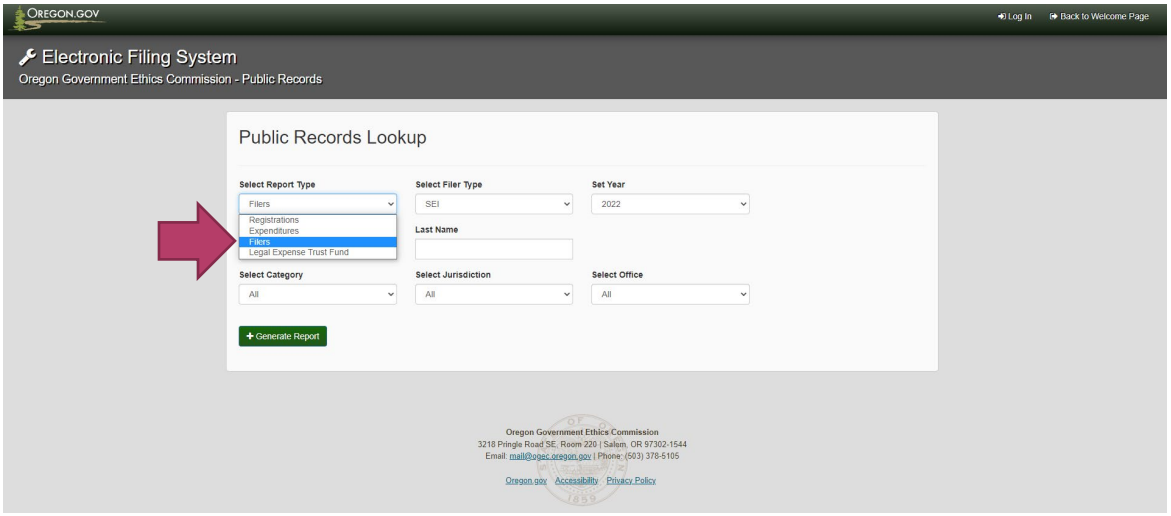
3. A drop down menu will appear. Click on Public Records Home



4. On the Public Records Home page, click on the blue “**View Public Records**” button under the Electronic Filing System (EFS) header.

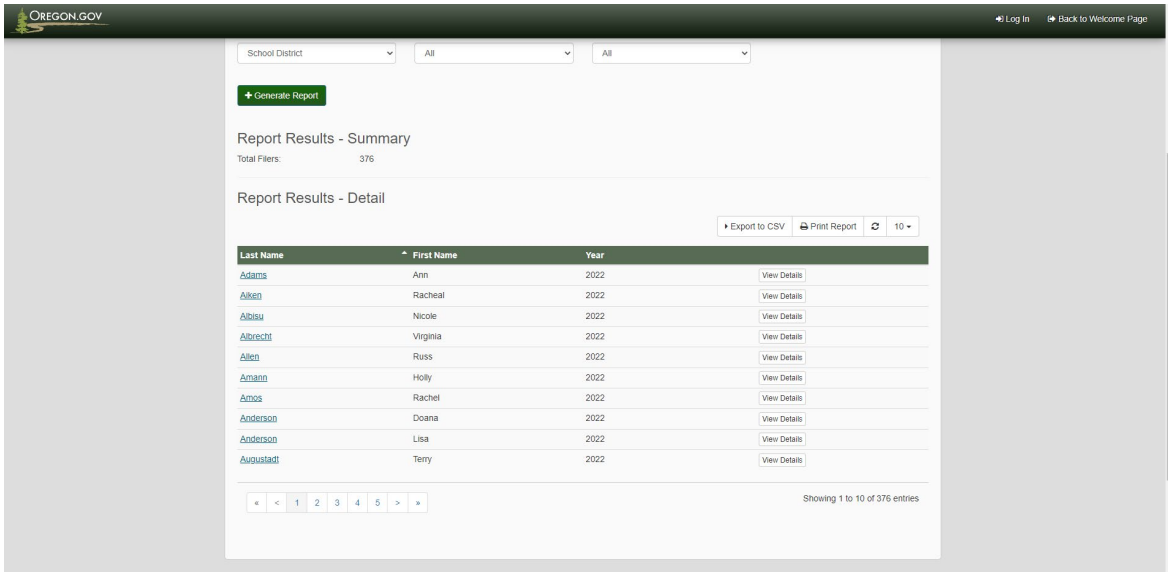


5. You will be redirected to EFS Public Records Lookup. Under Select Report Type, choose “**Filers**”



6. Select Filer Type: Choose “**SEI**”.
7. Set Year: Select year the SEI filers are required to file in (2023)
8. Skip First Name and Last Name fields
9. Select Category: Choose “School Districts”
10. Select Jurisdiction: Choose your jurisdiction.
11. Select Office: “All”
12. Click on green **“+ Generate Report**” button.

13. Scroll down. The report results will appear under the **"+ Generate Report"** button. It will list everyone in your jurisdiction that has filed for the year selected.

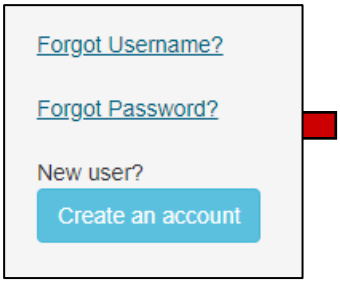


FORGOT PASSWORD

Contact OGEC staff at: 503-378-5105 / mail@ogec.oregon.gov to request a password reset. You will then be able to change your password and update the security questions on your account.

OR

1. From EFS login page, select the "**Forgot Password?**" navigation link.



2. "**Forgot Your Password**" window displays.

3. Enter your username. Select 

4. Answer security questions. Security question answers are case and space sensitive. *Note: If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.*

5. Select a new password. Passwords are case sensitive and must contain at least:
    a. 8 characters
    b. one upper case letter

c. one lower case letter
d. one number
e. one special character

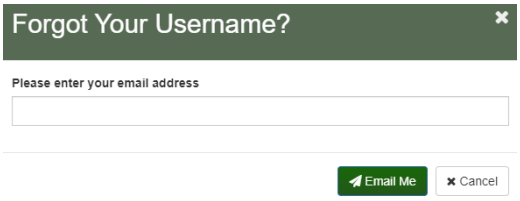
NOTE: *We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.*

FORGOT USERNAME

1. Most school districts usernames are JC(SchoolDistrictName)SD

2. From EFS login page, select the "**Forgot Username?**" navigation link.

3. In the "Forgot Your Username?" pop-up, enter your email address and click on "Email Me".



4. You will be routed back to the login page. A system-generated message will appear in the body of the page. The message should read: "We found an account for, (*your email address*). An email will be sent to that address."

5. The system will generate an email from **ogec.notification@egov.com**. It will list all of the usernames associated with the email address used.

6. Any questions or issues, please contact OGEC staff.

SYSTEM REQUIREMENTS

To ensure the safety & security of your browsing experience, Oregon.gov websites are compatible with most popular browsing software. For more information, please visit Supported Browsers on Oregon.gov.

FAQS

How do I setup my school district's account in EFS?
OGEC staff has setup the jurisdictional accounts for all school districts. If you are unsure your username or password, please contact OGEC staff.

Once logged in to the account, do the sessions time out?
Yes. The session will time out after a 15 minute period of inactivity.

Can I tab between fields when assigning a seat?
Yes.

When do JCs need to have their jurisdictional lists completed and verified?
The annual deadline date is February 15th. However, it is highly recommended that JCs maintain all information listed for their jurisdiction throughout the year so that all EFS records are accurate year-round.

NOTE: *Any changes, additions or deletions of information that occur after the February 15th deadline and prior to the April 15th SEI filing deadline must be made in EFS within three (3) working days.*

Are JCs responsible for filing the SEI for filers in their jurisdiction?
No. JCs are responsible for ensuring that SEI filers create their personal profile accounts in EFS before March 15.

Are all public officials assigned to jurisdictional seats required to file a SEI?
Yes. Public officials listed under ORS 244.050 are required to file an SEI.

What if I do not know the appointment date for an individual?
For all existing school board members, their appointment dates will be January 1, 2023. For other persons, check with the individual or superintendent for assistance.

Can a filer file a paper SEI?
No. Since 2016, all required filers must file electronically.

When does the "window" for filing the SEI open?
You cannot file before March 15 of each year.

NOTE: SEI filers, who have an account profile, will receive an email notification letting them know the filing window is open and reminding them that they are required to file. This notification is sent on March 15.

When is the deadline for filing an Annual Verified SEI?
To avoid penalties, SEIs must be filed by April 15 of each year, even if April 15 falls on a weekend or holiday. EFS is online and open 24/7.
NOTE: If it is after April 15, and you have not filed, you must file as soon as possible.

ANNUAL VERIFIED STATEMENT OF ECONOMIC INTEREST INFORMATION



Oregon Government Ethics Commission

3218 Pringle Rd SE, Ste 220

Salem OR 97302-1680

Phone: 503-378-5105

www.oregon.gov/OGEC

The Oregon Government Ethics Commission (OGEC) has been informed that you are a public official who is required by ORS 244.050 to electronically file a Statement of Economic Interest (SEI). The governing body you serve has provided us with your name, position, and email address. You will have 30 days from the date you receive a system-generated email from the OGEC to create a username, password and confirm your pre-filled personal profile information is correct and electronically submit to OGEC.

During the filing period, failure to complete and electronically file by the final filing date may subject you to an automatic civil penalty of $10.00 for each of the first 14 days the SEI is late and $50.00 for each day thereafter, up to a maximum of $5,000 [ORS 244.350(4)(c)].

SEI FILING INSTRUCTIONS

- ORS 244.050 specifically identifies certain public officials who are required to electronically file the SEI. Your position is one of those listed. **If you do not believe that you are required to file a SEI or if you have other questions, please call OGEC at (503) 378-5105 as soon as possible.**
- If you hold more than one position that is required to file, you will only electronically file one SEI.

MOST COMMON FILING ERRORS

1. Failing to list all sources of household income for question 2. All sources of income exceeding 10% of the total annual **household** income must be listed. *(The question includes the public position you hold.)* Do not overlook the fact that a pension or social security benefit represents part of the household income. Please refer to the definition of income on page 3.

2. Completing items 7 to 10 when not necessary. Please carefully read the instructions in the box. The questions need to be answered only if the conditions described in the instructions apply to your responses.

- **Please do not fail to respond to the email notification!** ORS 244.350(4)(c) prescribes assessment of a penalty of $10 for each of the first 14 days the SEI is late and $50 for each day thereafter that passes after the filing deadline date, up to a maximum of $5000.

- You are required to electronically file **no later than April 15.** Please contact OGEC at 503-378-5105 if you have questions.

STATUTORY REFERENCES

Item 4-A, ORS 244.020(7)(b)(F) – Reasonable expenses paid by any unit of the federal government, a state or local government, a Native American tribe that is recognized by federal law or formally acknowledged by a state, a membership organization to which a public body as defined in ORS 174.109 pays membership dues or a not-for-profit corporation that is tax exempt under section 501(c)(3) of the Internal Revenue Code, for attendance at a convention, fact-finding mission or trip, conference or other meeting if the public official is scheduled to deliver a speech, make a presentation, participate on a panel or represent state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

Item 4-B, ORS 244.020(7)(b)(H) – Reasonable food, travel or lodging expenses provided to a public official, a relative of the public official accompanying the public official, a member of the household of the public official accompanying the public official or a staff member of the public official accompanying the public official, when the public official is representing state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

(i) On an officially sanctioned trade promotion or fact-finding mission; or

(ii) In officially designated negotiations, or economic development activities, where receipt of the expenses is approved in advance.

DEFINITIONS

"Business" means any corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual and any other legal entity operated for economic gain. This does not include income-producing not-for-profit corporations that are tax-exempt under section 501(c) of the Internal Revenue Code with which a public official or relative of a public official is associated in a non-compensated capacity. *[ORS 244.020(2)]*

"Income" means income of any nature derived from any source, including but not limited to any salary, wage, advance, payment, dividend, interest, rent, honorarium, return of capital, forgiveness of indebtedness, retirement income, real estate

transactions, inheritance income, or anything of economic value received as income including income from government sources (i.e., social security, your public salary, etc.). *[ORS 244.020(9)]*

"**Honorarium"** means a payment or something of economic value given to a public official in exchange for services upon which custom or propriety prevents the setting of a price. Services include, but are not limited to, speeches or other services rendered in connection with an event. *[ORS 244.020(8)]*

"Person" means, for purposes of this form, (a) the public official required to file a Statement of Economic Interest and (b) an individual, corporation, partnership, joint venture, and any other similar organization or association.

"Member of Household" means any person who resides with the public official. *[ORS 244.020(11)]*

QUESTIONS REQUIRING DISCLOSURE

1. **BUSINESS OFFICE OR DIRECTORSHIP; BUSINESS NAME**:

A. If you or a member of your household were an officer or director of a business *(see definition of "business")* during **2022**, please indicate that information below. *(These would be personal business ventures, not the public position you hold. Items A and B may be the same and Item B may be subsidiary of parent company listed in Item A for example.)* **[ORS 244.060(1) & (2)]**

You will list the **Business Name**, the **Title of Office**, **Business Address**, **Held by Whom**, and a **Description of the Business**.

B. List the names under which you or members of your household did business *(see definition of "business")* during **2022**:

You will list the **Business Name**, the **Title of Office**, **Business Address**, **Held by Whom**, and a **Description of the Business**.

2. SOURCES OF INCOME

Identify the sources of income *(See definition of "income")* received by you or a member of your household, who is 18 years of age or over, during the **2022** calendar year that produced 10% or more of the total annual household income. *(Your business would be a source, not the individual clients of your business.)* **[ORS 244.060(3)]**

You will list the **Name of the Source**, **Address of the Source**, and a **Description of the Source**. For example: *Salem Hospital, 1234 Oak St., Salem OR; Husband's salary*.

3. REAL PROPERTY

List all real property *(residential, commercial, vacant land, etc.)* in which, during **2022**, you or a member of your household had any ownership interest, any option to purchase or sell, or any other right of any kind in real property, including a land sales contract, **located within the geographical boundaries of the public entity you serve**. (*Boundaries for legislators, or filers from state agencies, boards, commissions or institutions would be the state borders. Boundaries for local filers would be the limits of the city, county or district you serve.)* [ORS 244.060(4)(a)] **Do not list your principal residence**. **[ORS 244.060(4)(b)]**

You will list a **Description of the real property** and **Address**.

4. OFFICE RELATED EVENTS

A. List the amount of any expenses with an aggregate value exceeding $50 provided to you during **2022** when participating in a convention, mission, trip, or other meeting as described in ORS 244.020(7)(b)(F), *(see reference),* which is an exception to gift restrictions. *(Do not list expenses that were paid by the public body you represented.)* **[ORS 244.060(5)]**

You will list the **Date**, **Organization Name**, **Address**, **Nature of Event** and **Amount**.

Any organization, unit of government, tribe or corporation that provides a public official with expenses with an aggregate value exceeding $50 for an event described in ORS 244.020(7)(b)(F) shall notify the public official in writing of the amount of the expense. The organization, unit, tribe or corporation shall provide the notice to the public official within 10 days after the date the expenses are incurred. This notification may be uploaded when filing.

B. List the amount of any expenses with an aggregate value exceeding $50 provided to you during **2022** when participating in a mission, negotiations, or economic development activities described in ORS 244.020(7)(b)(H), *(See reference),* which is an exception to the gift restrictions. *(These events are those that were officially sanctioned or designated by your public body. Do not list expenses that were paid by the public body you represented.)* **[ORS 244.060(6)]**

You will list the **Date**, **Organization Name**, **Address**, **Nature of Event** and **Amount**.

5. HONORARIA

List all honoraria *(see definition)* allowed in ORS 244.042, with a value exceeding $15, received by you or a member of your household during **2022**. **[ORS 244.060(7)]**

You will need the **Date**, **Organization Name**, **Nature of Event** and **Amount**.

Under ORS 244.100(2) any person that provides a public official or candidate, or a member of the household of the public official or candidate, with an honorarium or other item allowed under ORS 244.042 with a value exceeding $15 shall notify the public official or candidate in writing of the value of the honorarium or other item. The person shall provide the notice to the public official or candidate within 10 days after the date of the event for which the honorarium or other item was received.

6. SHARED BUSINESS WITH LOBBYIST

List the name of any compensated lobbyist who was associated with a business with which you or a member of your household was also associated during **2022**. (*Example: The public official or household member is an employee or owner of a private company that also employs a lobbyist. Owning stock in a publicly traded company in which the lobbyist also owns stock is not a relationship that requires disclosure.)* **[ORS 244.090(1)]**

You will need the **Name of the Lobbyist**, the **Name of the Business** and the **Type of the Business**.

PLEASE NOTE – DO NOT answer items 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business or could reasonably be expected to do business with the governmental agency of which you hold an official position or over which you exercise any authority.

"Legislative or administrative interest" means an economic interest, distinct from that of the general public in any matter subject to the decision or vote of the public official acting in the public official's capacity as a public official.

7. INCOME OF $1,000 OR MORE

Respond only if you or a member of your household received a source of income exceeding an aggregate amount of $1,000 during **2022**, and that income was derived from an individual or business that has been doing business, does business, or could reasonably be expected to do business with, or has a legislative or administrative interest in the governmental body you serve. **[ORS 244.060(8)]**

You will need to report the **Income Source**, **Address** and **Description**.

8. DEBT OF $1,000 OR MORE

Respond only if you or a member of your household owed a debt of $1,000 or more to a person *(see definition of "person")* during **2022**, and that debt involved an individual or business that did business with, or reasonably could be expected to do business with, or had a legislative or administrative interest in the public body you serve. ***(****Note: Do not list loans from state or federally regulated financial institutions (banks, etc.) or retail credit accounts and do not list the amounts owed.****)*** **[ORS 244.070(1)]**

You will need to list the **Name of Creditor**, **Date of Loan**, and **Interest Rate of Loan**.

9. BUSINESS INVESTMENT OF MORE THAN $1,000

Respond only if you or a member of your household had a personal, beneficial interest or investment in a business *(see definition of "business")* of more than $1,000 during **2022**, if the investment involved an individual or business that did business with or reasonably could be expected to do business with or had a legislative or administrative interest in the public body you serve. *(Note: Do not list the amount of the investment. Do not list individual items in a mutual fund or blind trust, or a time or demand deposit in a financial institution, shares in a credit union, or the cash surrender value of life insurance.)* **[ORS 244.070(2)]**

You will list the **Business Name**, **Address**, and a **Description of the Business**.

10. SERVICE FEE OF MORE THAN $1,000

Respond only if **you** *(not your business)* received a fee of more than $1,000 in **2022** from a person *(see definition of "person")* for whom you performed a service, if the service involved an individual or business that did business with, or reasonably could be expected to do business with, or had a legislative or administrative interest in the

public body you serve. *(Do not list fees if you are prohibited from doing so by law or a professional code of ethics.)* **[ORS 244.070(3)]**

11. **VERIFICATION**:
    Under penalties for false swearing/false affirmation, I declare that the information submitted in this electronic filing is, to the best of my knowledge and belief, true, accurate, and complete.

As with other provisions in Oregon Government Ethics law, it is each public official's personal responsibility to ensure they comply with the requirements to complete and electronically submit the SEI by April 15.

If you have any questions regarding the Annual Verified Statement of Economic Interest or the Oregon Government Ethics Commission, please call or email the OGEC staff.

Oregon Government Ethics Commission
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