# QUICK USER GUIDE FOR SFI FILING APPLICATION

The Statement of Financial Interests ("SFI") Filing Application (the "SFI system"), allows you to complete, certify, and submit your SFI online. Below are the steps you need to take to file your SFI using the SFI system.

1. When the system opens for filing each year, you will receive an email with your User ID, a link to obtain your Password if you have forgotten it, along with the direct link to the SFI system: https://www.sfi.eth.mass.gov/security/Login.aspx. If if is your first time filing an SFI, the email will include your temporary Password to access the SFI system. Your temporary Password is case-sensitive so you must match the characters exactly to login. Once you login, you will be asked to create and confirm a new Password.

2. After you login to the SFI system, the Filer Dashboard will appear. If you are logging in to the system for the first time, you should click SFI Filings, and then click Pending Filings to open your SFI for the year you are filing.
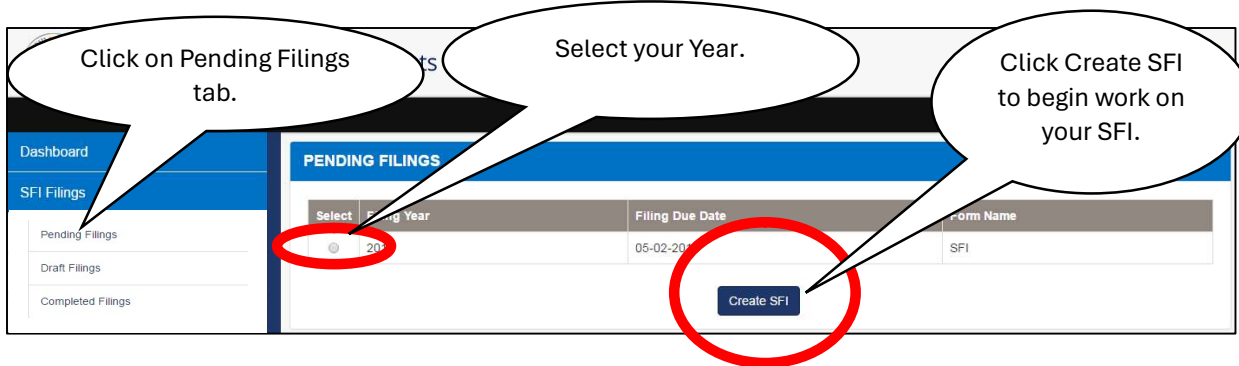
3. Once you have opened your SFI, you will see the Overview, which contains the section headings of the SFI form. Based on the answers you provide; the Overview questions work as a filter to help the SFI system identify which questions you are required to answer.
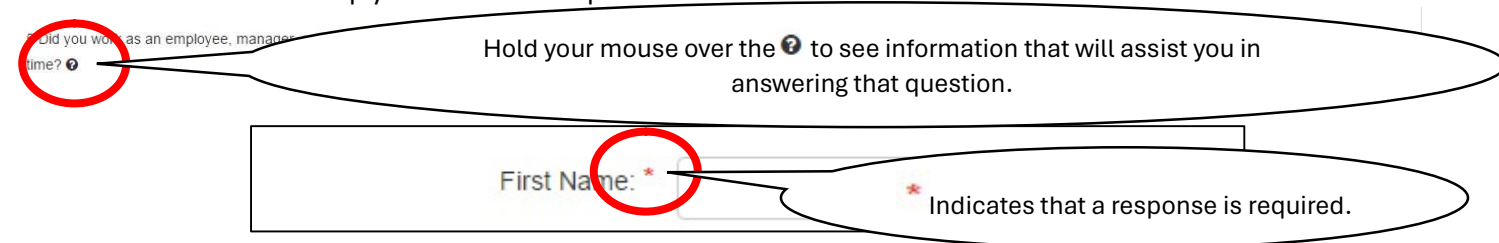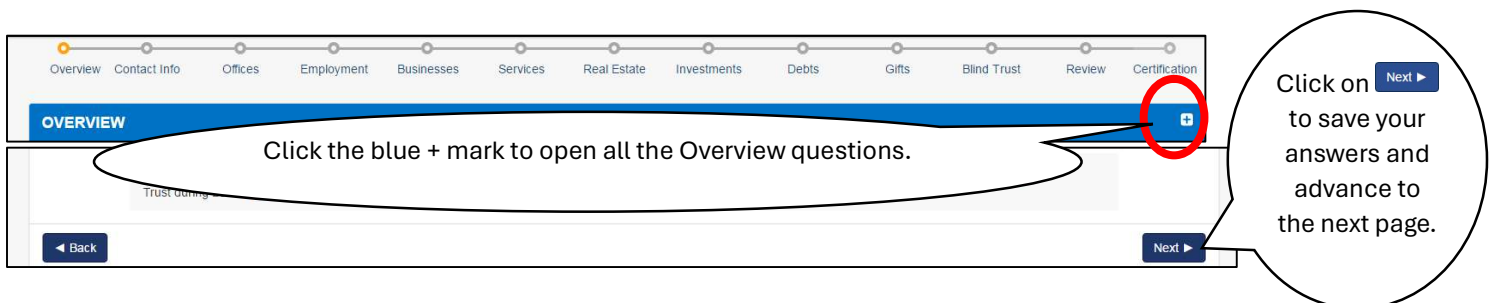

After you have answered all the Overview questions, click **Next ▶** at the bottom of the page to save your responses and proceed to the next section of the SFI. If you click **◀ Back** on the Overview Page to return the Filer Dashboard, your answers will <u>not</u> be saved.

4. The sections of the SFI form are displayed on the navigation bar located at the top of the screen. **<u>Please note that you will not be able to advance to the next section until the prior section has been completed.</u>**

Once a section has been completed, it will be available for further review and editing at any time before you certify and submit your SFI. If you wish to continue working on your SFI at a later time, Click **Save Draft** to save your draft SFI and return to the Filer Dashboard.

5. The electronic SFI form has a number of help bubbles which are indicated by ❓. The help bubbles contain definitions and other information to help you answer each question.

Did you work as an employee, manager... time? ❓

Hold your mouse over the ❓ to see information that will assist you in answering that question.

First Name: *

* Indicates that a response is required.

After you enter information on the form, you will need to click **Add** to ensure it is entered into the system. Certain questions may require you to enter multiple responses. For example, you may be reporting ownership of multiple pieces of property. After entering the information relating to each piece of property, click **Add** each time.
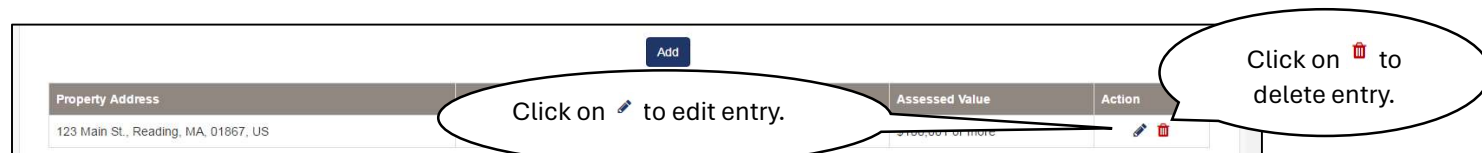
13.b Was this Real Estate transferred to you or your Business during 2015?   ○ Yes ● No

Add

Property Address	Transferor Name	Transferor Address	Assessed Value
		No records found.	

Click on **Add** to save entry.

To edit your answers, click the ✏️ icon in the Action column to view the data you entered. After completing your changes, click **Update** to save your changes. You can delete an entire entry by clicking the 🗑️ icon.

Add

Click on 🗑️ to delete entry.

Property Address			Assessed Value	Action
123 Main St., Reading, MA, 01867, US			$100,001 or more	✏️ 🗑️

Click on ✏️ to edit entry.

When navigating through the screens, please use the following navigation tools at the bottom of filer screen.

◄ Back   Save Draft   Next ►

Click ◄ Back to return to the prior page without saving your most recently made

Click Save Draft to save your draft SFI and return to the SFI Filer Dashboard.

Click Next ► to **save and advance** to the next page.

6. After you have completed all of the sections, a draft of your completed SFI will be available in the Review section. You should review your responses to ensure that they are accurate and complete prior to submitting your SFI. You may review your responses online or print a PDF copy of your draft for reviewing off-line.

City:	State:	Zip:
Boston	Massachusetts	02133

◄ Back   Save Draft   Print Report   Next ►

Print PDF Report.

Click Next ► to the Certification and Submission page.

7. After you have completed your review of your draft SFI and no further changes are necessary, click the **Submit Filing** button on the final page. After you submit your SFI, you can print or save a PDF of your filing. After submitting your SFI, you will receive an email from the Commission acknowledging your submission with an attached Filing Receipt.

If you need assistance, please contact any of the following Commission staff: Lauren Duca (Deputy Chief/SFI) at (617) 371-9503; Tony Webb (IT Specialist) at (617) 371-9526; or Rose Costa (Special Assistant to Administration & SFI) at (617) 371-9522.