

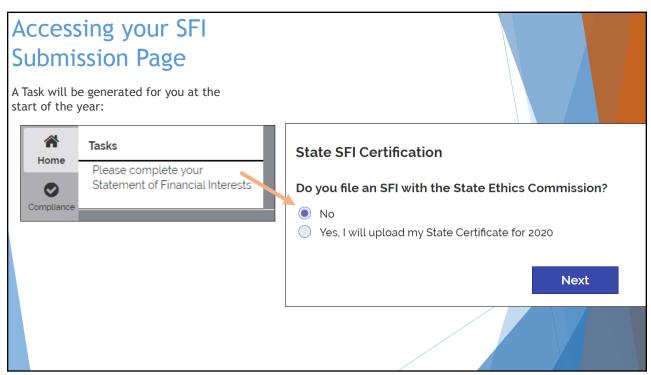
**PROSPER SFI Submission Overview** 

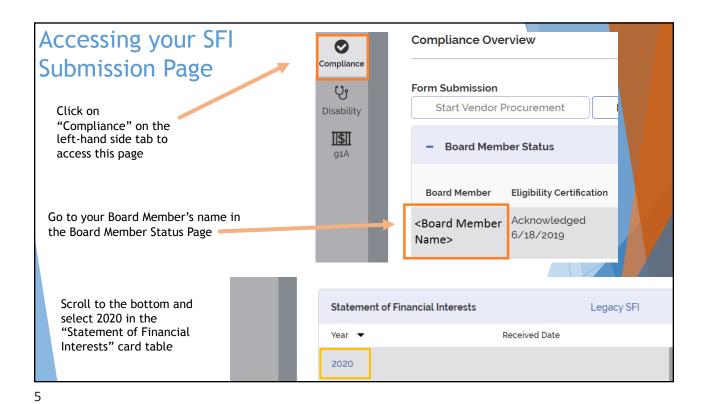
- New functionality to submit Statement of Financial Interests (SFI) filings through PROSPER has been released
- Submitting your SFI online will result in improved time to completion, greater record traceability, and automatic digital document record keeping
- ▶ New module will remember and carry over the previous years' entered SFI information
  - Meaning after the first year, Board Members will only need to provide updates to their information that has changed in the prior year
  - ▶ No more having to duplicate the same answers year after year if no updates have taken place
  - Will allow PERAC to track and acknowledge these submissions and produce a quicker turnaround time

### **PROSPER SFI Submission Overview**

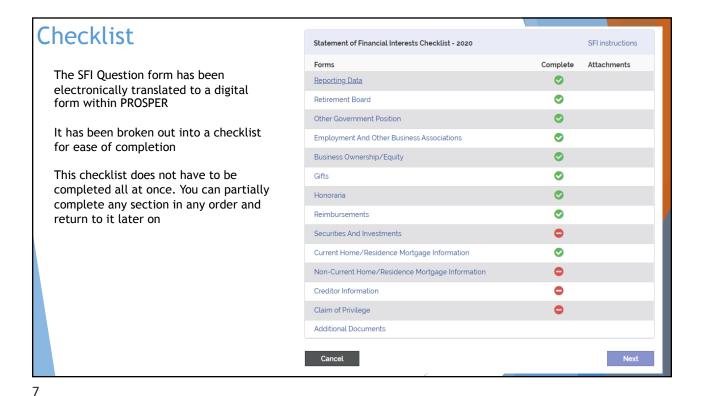
- ▶ All Board Members will automatically have an SFI generated for them at the start of every year (Including for this year, 2020)
  - New Board users will have an SFI generated for them for the prior year upon their PROSPER account creation (Future Functionality)
  - ▶ Members who are on multiple boards will only need to complete one SFI
- System Requirements: Google Chrome Browser (Apple's Safari Browser is not supported)
- ▶ SFI Applications are due on May 1 for standard filers and June 1st for 268B filers
- ▶ If you or a member of your team needs new access to PROSPER, please contact our Help Desk and complete the PROSPER Individual Account Approval Application Form

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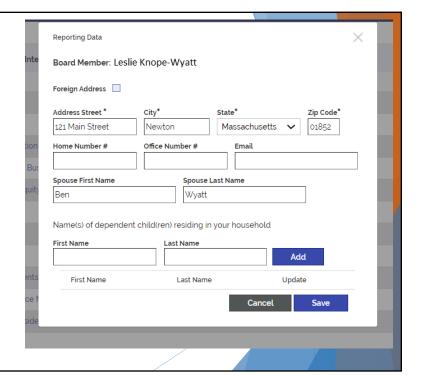


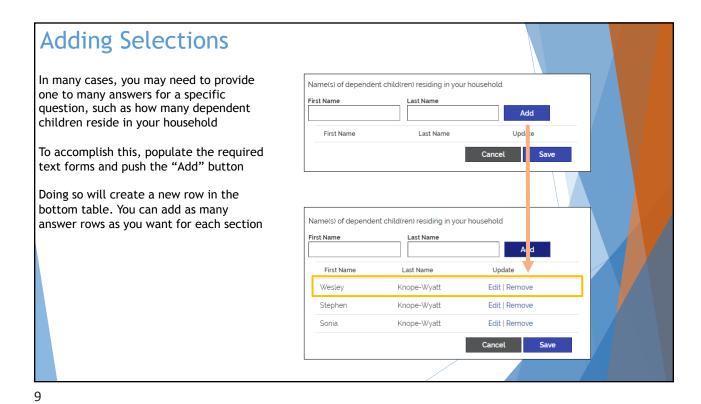
**Checklist Form** 

Selecting the blue text of a checklist row will have a popup window appear on screen with questions pertaining to that specific SFI form

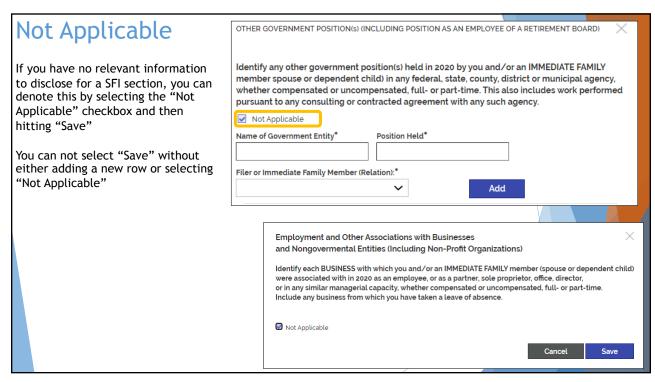
For some forms, if information exists for you on file, such as your name and address, PROSPER will automatically import it. However, if need be, it can be manually updated if changes have taken place

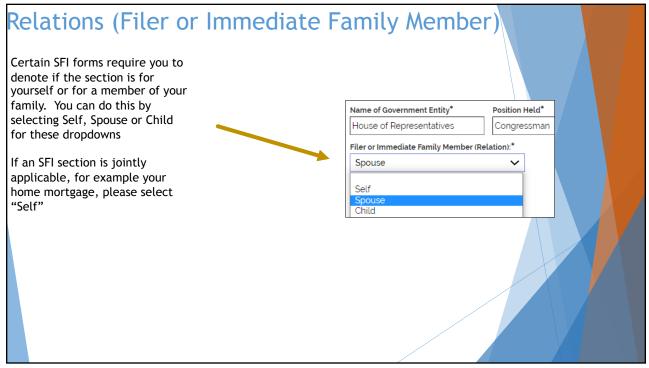
In future years, PROSPER will carry over your past answers to help reduce duplication





Edit and Remove -Update Entry Creditor Name\* Bank of America After a row has been added, you can Foreign Address edit or remove it Creditor Address\* 1234 Office Building 67 Union Street, Ste 406 "Edit" will re-populate the existing City\* forms to allow the Board Member to Natick make changes Interest Rate "Remove" will prompt a confirmation Cancel for the Board Member to remove the Interest Rate row Bank of America Edit | Remove Creditor Name Interest Rate Relation Up date Bank of America 3.01% Self Edit Remove Remove Securities Investments Entry Are you sure you want to remove this Securities Investments entry?

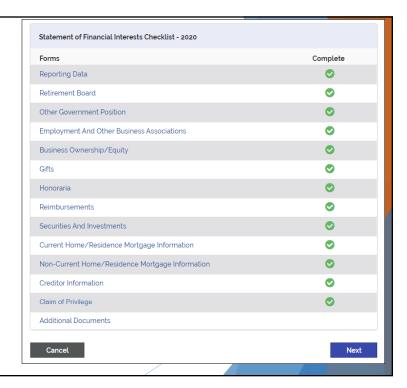




# Checklist Completion

After each SFI section has had information added to it or has been denoted as "Not Applicable", the "Next" button will unlock

Until all pages have been completed, you can not progress

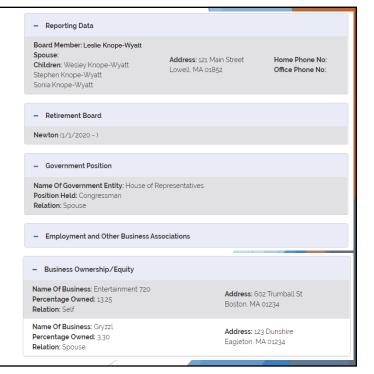


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## Summary Review

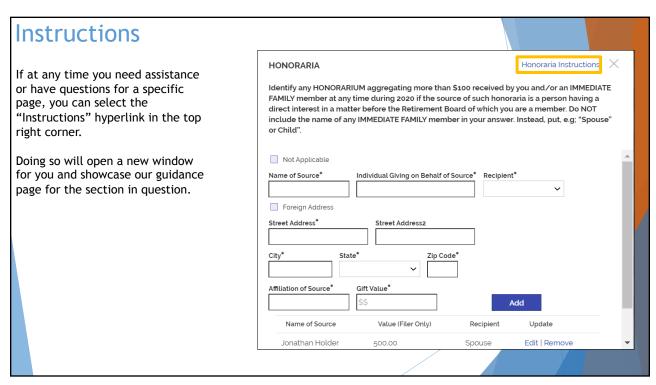
After completing the checklist and progressing via the "Next" button, PROSPER will present to you a Summary Review page detailing everything you have entered in previously on one single page

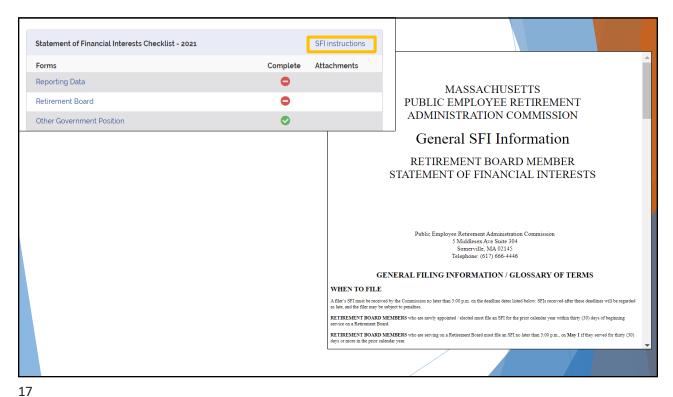
If multiple entries were added to a single section, all of them will appear in full here



#### Certification Certification I certify under the pains and penalties of perjury that: I made a reasonably diligent effort to obtain the required information concerning myself and IMMEDIATE FAMILY MEMBER(s) residing in my household, After reviewing the Summary Review if any, and the information provided on this form and any attachments is true and complete, to the best of my knowledge. page and selecting the "Next" button, a Certification sign-off section will appear at the bottom of By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of the page perjury that the information provided herein is true and complete to the best of my knowledge. Last Name\* This Certification acts as your digital signature sign-off and upon hitting The electronic signature must match the name Robert W Healy "Sign Document", will submit your ☐ I acknowledge that I am electronically signing this form\* SFI to PERAC Sign Document COMPLETE: The SFI is now submitted to PERAC

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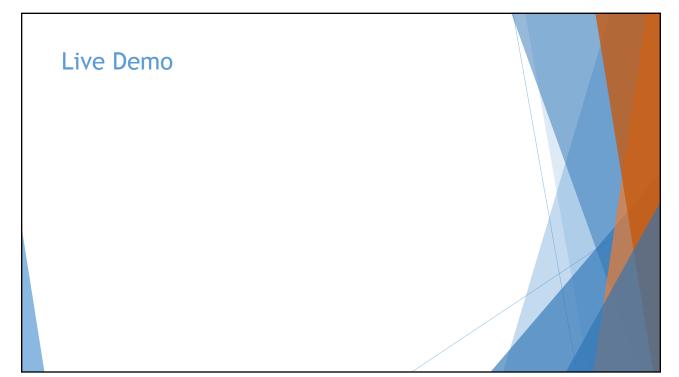
# **Updating your SFI** If you need to update your SFI after submitting it, you may do so by contacting PERAC and requesting your application be put "Under Review" until May 1st If you need to make an update after your SFI has been approved, please contact PERAC support



For questions related to filling out your SFI online please contact: Email: <a href="mailto:per-dl-compliance@massmail.state.ma.us">per-dl-compliance@massmail.state.ma.us</a> Phone: (617) 666-4446 ex. 922

For Technical Assistance please contact: Email: <u>per-prosperhelp@per.state.ma.us</u> Phone: (617) 591-8983

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Appendix - 268B Checklist

268B Statement of Financial Interests Checklist - 2021

Forms Complete

Reporting Data

Retirement Board

Gifts

Honoraria

Reimbursements

Chapter 268B

Claim of Privilege

Additional Documents

Cancel

Submit

