

Financial Disclosure Report Instructions

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* FDR System Web Link *

To access your FDR use the following link: <https://webapp1.sanantonio.gov/fdr/>

The website page will open to:



* Logging on to the FDR System *

1.

A screenshot of the login form. It has a section "LOGON USING:" with three radio buttons: "COSA network logon credentials.", "SAP employee number.", and "Assigned logon id. (non city employees)". The third option is selected. Below this are two input fields: "Logon ID:" containing "888888" and "Password:" containing "pass1". A "Login" button is at the bottom. Red arrows point to the selected radio button, the Logon ID field, the Password field, and the Login button.

Board Members:

- Select “**Assigned Logon Id**”
 - Contact your board liaison to obtain your logon ID
- **Logon ID:** enter Assigned Logon ID
- **Password:** pass1
- **Select:** “Login”
- **Error Message:** “**Invalid LogonId or Password**” contact your board liaison or the Office of the City Clerk

2.

A screenshot of the "Change Password" form. It has three input fields: "Current Password:" containing "pass1", "New Password:" containing "*****", and "Retype New Password:" containing "*****". A "Change Password" button is at the bottom. Red arrows point to the Current Password field, the New Password field, the Retype New Password field, and the Change Password button. Text next to the Current Password field says "Enter Old Password" and "(First time users: use password sent in email)". Text next to the New Password field says "Enter New Password". Text next to the Retype New Password field says "Re-Enter New Password".

Change Password

- **Current Password:** pass1
- **New Password:** enter five characters or more (No special characters)
- **Retype New Password:** (re-enter new password)
- **Select:** “Change Password”

3.



- Select: "Continue"

4.

- Select
- Select current Report "Official20__"

FDR OPTIONS:

[Home](#)
[Logoff](#)

Welcome Holly Hock

If you are not Holly Hock click [here](#)

Your current due date is: 10/31/20XX

View Report	Finalized Date	Type	Attach	Amend
Official20XX		Official		
Official2012	2/14/2013	Official		
Amendment2011	2/11/2011	Amendment		
Official2011	2/11/2011	Official		

Select most current Report from List "Official20__"

5.

Period of Report: Previous Year

Type of Report

Initial Annual

Period of Report: From January 1, 20XX To December 31, 20XX

Note:

The reporting period is for the **previous year:**

Example: Official2013 form will read as follows:

From January 1, 2012 To December 31, 2012

* Invalid Logon Id or Password Message *

Invalid LogonId or Password.
LOGON USING:

- COSA network logon credentials.
- SAP employee number.
- Assigned logon id. (non city employees)

Logon ID:

Password:

Login

[Forgot Password](#)

- Error Message received:
 - “Invalid LogonId or Password
- Solution:
 - Contact the Office of the City Clerk or your Board Liaison (your information will have to be reset in the FDR System)

* Forgot Password *

1. Select “Forgot Password”

The City of San Antonio’s Financial Disclosure Reporting (FDR) web based application contains information required to be disclosed by the City’s Ethics Code.

The following help options are available.

Email
ethics@sanantonio.gov

Business Support - Office of the City Clerk
Monday thru Friday 7:45AM - 4:30PM
(General office number) 210-207-7253
Rosalinda Diaz 210-207-7021
Brandon Smith 210-207-3397

Invalid LogonId or Password.
LOGON USING:

- COSA network logon credentials.
- SAP employee number.
- Assigned logon id. (non city employees)

Logon ID:

Password:

Login

[Forgot Password](#)

Please enter your UserID and click "Submit".

SAP System

UserID:

Submit

2. UserID: enter your Logon ID
 3. Select
 4. An email with your new password will be sent from “FDR@sanantonio.gov” to the email address on file
- Note:** An email will also be sent to your Board Liaison notifying them you requested a new password

* Pop-Up Blockers *

Before you logon to the FDR System check to see if your computer has the “Pop-up Blocker” turned on:

If your “Pop-up Blockers” are on you may have problems logging on to the FDR System or opening your Report. See Option 5 for Mac Computers and Chrome Browser users.

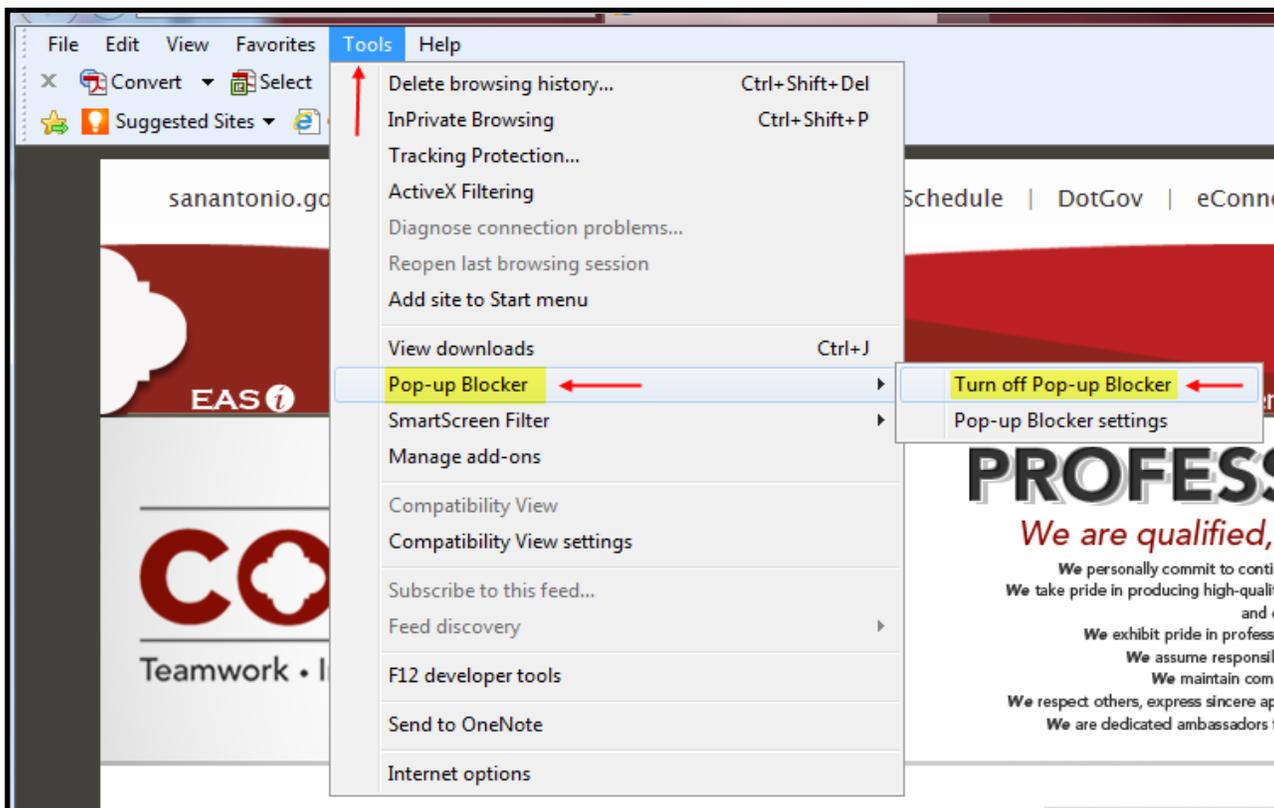
Option 1:

- Click on the bar with the message and select Always Allow Pop-ups from the drop down menu



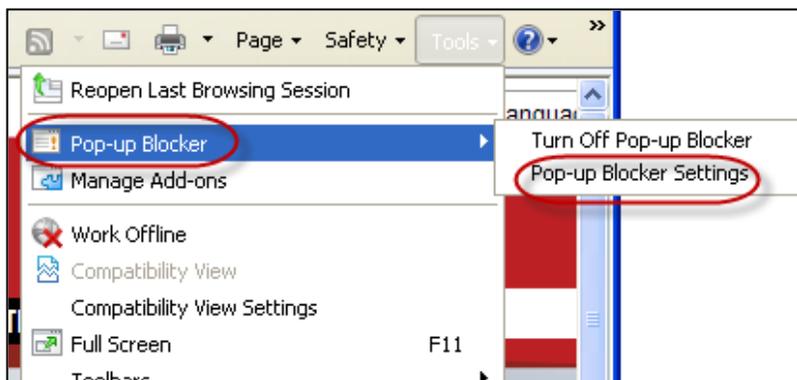
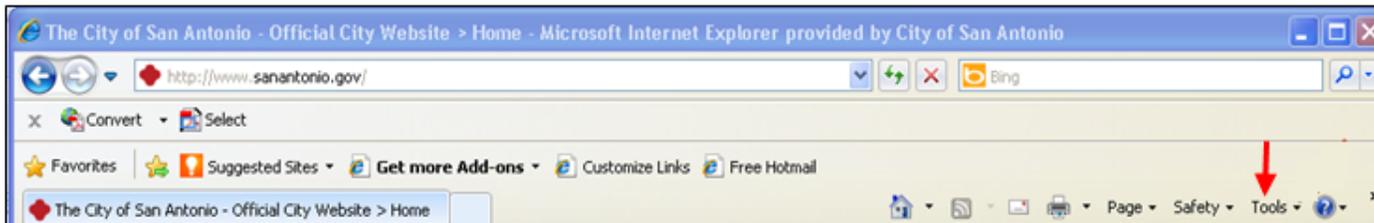
Option 2:

- Open Internet Explorer 
- Select Tools on the Menu Bar
- Select Pop-up Blocker from the drop down list
- Select Turn Off Pop-up Blocker from the side list

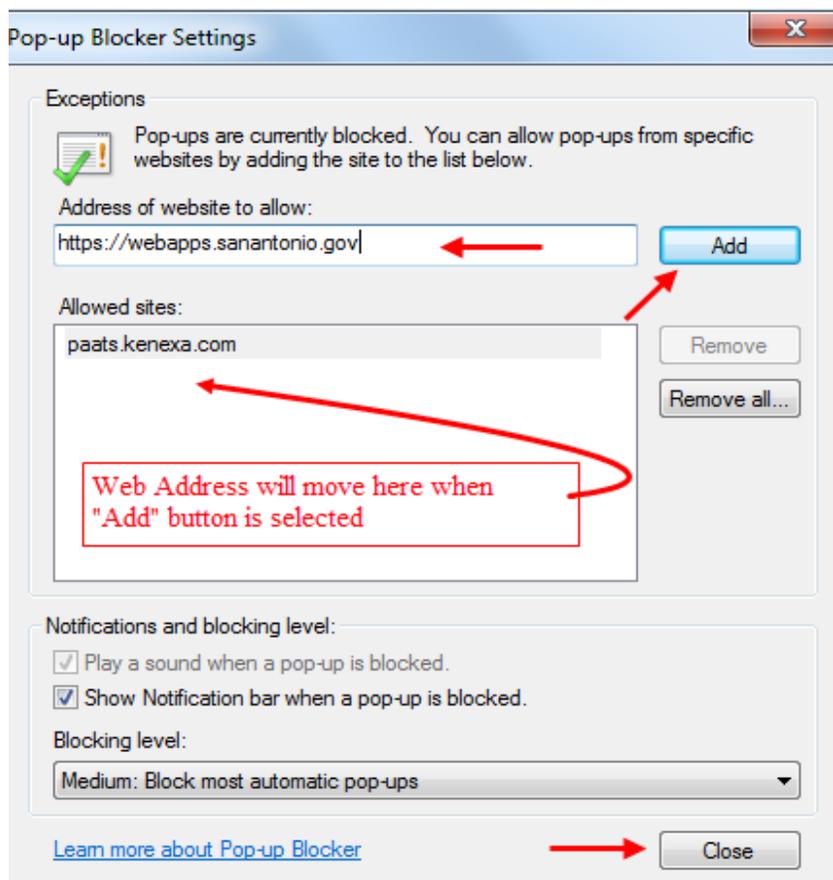


Option 3:

- Open Internet Explorer 
- Select Tools on the Menu Bar



- Select Pop-up Blocker from the drop down list
- Select Pop-up Blocker Settings from the side list



- Enter <https://webapps.sanantonio.gov/fdr/> in Address of website to allow
- Select the “Add” button
- Web Address will move to the box below titled “Allow Sites”
- Check off both boxes under “Show Notifications and blocking level:”
- Select the Close button

Option 4:



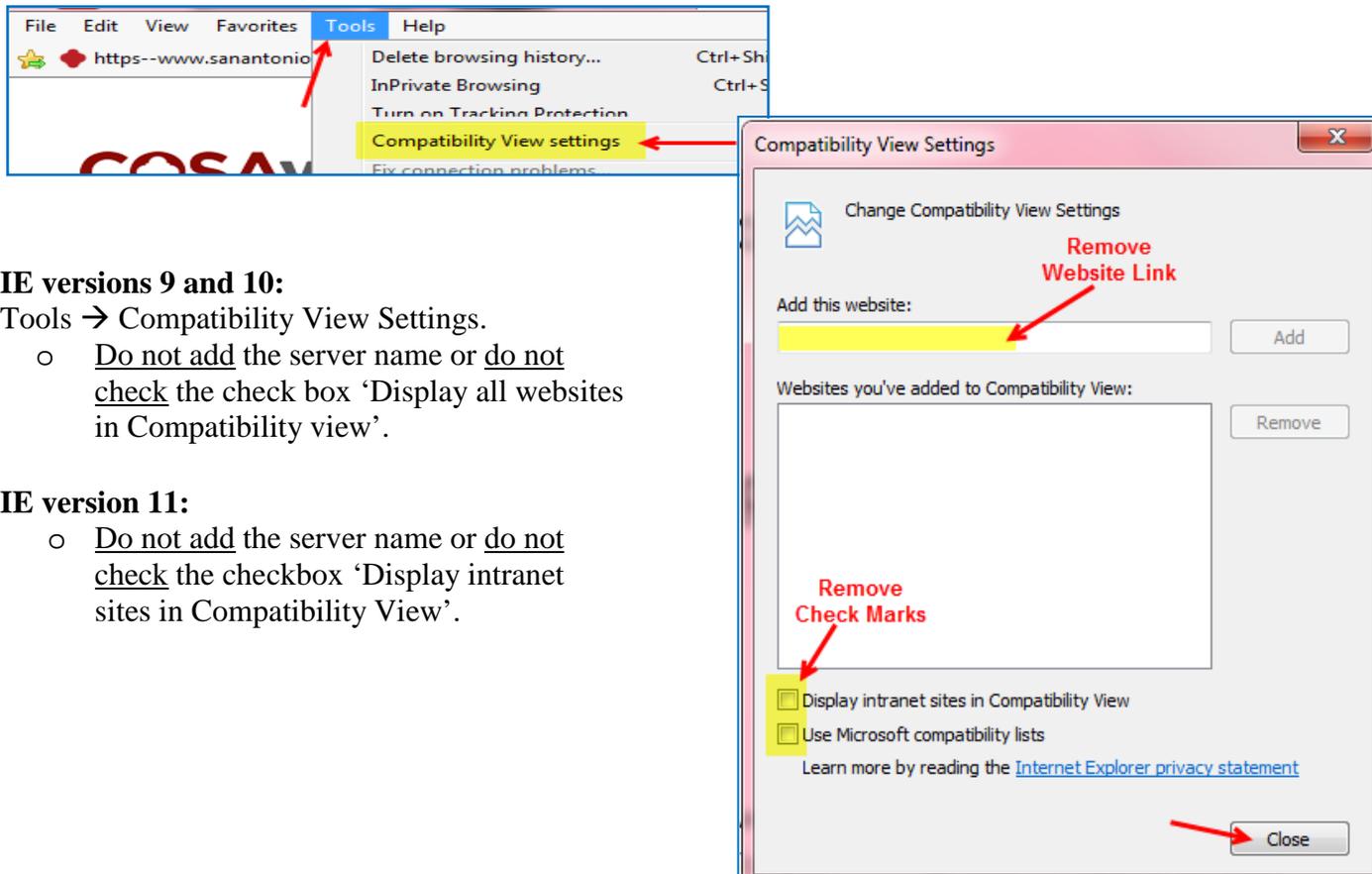
If you receive FDR Access issues using IE browsers, please try the following, which resolve most of the access issues.

1. Allow pop-ups from the FDR website by adding the website to the browser.

IE versions 9 and 10: Tools → Pop-up Blocker → Pop-up Blocker Settings. Type the url <https://webapp1.sanantonio.gov/fdr/> or <https://cosaweb1/fdr/> (depending on which url the user uses to access the FDR system) and click 'Add' button.

IE version 11: Tools → Pop-up Blocker → Turn off Pop-up Blocker

2. Try single click or double click depending on how their mouse was setup.
3. Make sure compatibility view was **turned off**. Turning it on will cause popup messages since the servers have security certificate.



- **IE versions 9 and 10:**

- Tools → Compatibility View Settings.

- Do not add the server name or do not check the check box 'Display all websites in Compatibility view'.

- **IE version 11:**

- Do not add the server name or do not check the checkbox 'Display intranet sites in Compatibility View'.

4. **IE versions 9 and 10:** Tools → Internet options → Advanced → Browsing → Check the checkbox – Automatically recover page layout errors with compatibility view.

IE version 11: Doesn't have this setting.

Option 5:

For MAC users:

Pop-up Blockers should be disabled in any browser for FDR system.

Safari:



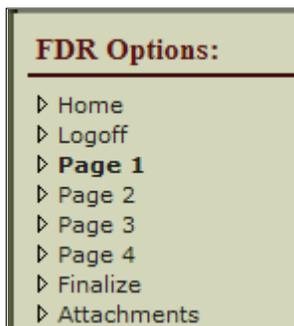
- Choose Safari → Preferences → then click Security
- In the “Web content” and “Internet plug-ins” sections, select “Un-Block pop-up windows,” then select Enable
- JavaScript, Allow plug-ins, or both

Chrome:



- Choose Chrome → Preference, then click Advanced Settings
- Under Privacy, select Content Settings, then select Pop-ups, Manage Exceptions
- Enter <https://webapp1.sanantonio.gov/fdr/> or <https://cpsaweb1fdr/> and Allow

* How to Navigate through the FDR System *



FDR Options:

- Select **Home**:
 - This option will take you to the Welcome Page
- Select **Logoff**:
 - This option will exit you from the FDR System
- Select **Page** number from the list
 - This option will take you to the page number you select
- Select **Finalize**:
 - This option will take you to the last page where you will:
 - Complete the Public Disclosure Information Statement
 - Consent for Public Information Statement
 - Complete the Oath
 - Enter your Electronic Signature
 - Submit your finalized report
- Select **Attachments**:
 - To add, remove, or view an attachment

OR

Select **Next** or **Previous** at bottom of each page to move forward or return to prior page



* Entering Information in Cells *

Status of Reporting Party	
<input type="checkbox"/> City Official	Official Title:
<input checked="" type="checkbox"/> Board/Commission	Board/Commission Name: Empowerment Zone Governance Board
<input checked="" type="checkbox"/> City Employee	Job Class/Department:

- Pre-Populated with:
 - Official Title:
 - Job Class/Department:
 - Board/Commission:

(A) The reporting party's name:			
Last Name	First Name	Middle Name	Suffix
Hock	Holly		

- Pre -Populated with:
 - Last Name
 - First Name
 - Middle Name
 - Suffix

First Question on the report you will answer is Letter B:

- Enter answer in cell (ex. "HEB")
- Select

Proceed to the next question unless you have another entry for this question

(B) Reporting party's employer(s):				
<table style="width: 100%;"> <tr> <td style="width: 80%;">* Reporting party's employer</td> <td style="width: 20%;"><input type="button" value="ADD/SAVE"/></td> </tr> <tr> <td>HEB</td> <td></td> </tr> </table>	* Reporting party's employer	<input type="button" value="ADD/SAVE"/>	HEB	
* Reporting party's employer	<input type="button" value="ADD/SAVE"/>			
HEB				
No Records Found				

- Answer will appear below the question (see below)

(B) Reporting party's employer(s):						
<table style="width: 100%;"> <tr> <td style="width: 80%;">* Reporting party's employer</td> <td style="width: 20%;"><input type="button" value="ADD/SAVE"/></td> </tr> <tr> <td style="height: 20px;"></td> <td></td> </tr> </table>	* Reporting party's employer	<input type="button" value="ADD/SAVE"/>				
* Reporting party's employer	<input type="button" value="ADD/SAVE"/>					
No Records Found						
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4b4b4b; color: white;"> <th style="width: 70%;">* Reporting party's employer(s)</th> <th style="width: 10%;">Edit</th> <th style="width: 20%;">Delete</th> </tr> </thead> <tbody> <tr> <td>HEB</td> <td style="text-align: center;"><input type="button" value="EDIT"/></td> <td style="text-align: center;"><input type="button" value="DELETE"/></td> </tr> </tbody> </table>	* Reporting party's employer(s)	Edit	Delete	HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
* Reporting party's employer(s)	Edit	Delete				
HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>				

Entering more than one answer for the same question:

5. Enter information in cell if need and select
6. Your answer will appear above the first entry (see below)

Follow the same process if needed to enter more entries for the same question

(B) Reporting party's employer(s):

* Reporting party's employer

* Reporting party's employer(s)	Edit	Delete
Walmart	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

*** **Complete all fields:** Enter "N/A" in each cell if you have no information to disclose (some questions require multiple answers)

(H) The name of any Business Entity of which the reporting party or the reporting party's parent, child or spouse, or entity disclosed under (G) is known to be (1) a subcontractor on a city contract; (2) A partner; or (3) A parent or subsidiary Business Entity:

* Name of Business Entity * Subcontractor/Partner/Parent * Owner

No Records Found

*** Editing Information in Cells ***

To EDIT an answer:

1. Select by the answer you wish to make changes to

(B) Reporting party's employer(s):

* Reporting party's employer

* Reporting party's employer(s)	Edit	Delete
Walart	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

Business name misspelled →

2. Your answer will appear in the cell
 - Item in blue is the answer you are editing

(B) Reporting party's employer(s):

* Reporting party's employer
 Walart ←

UPDATE/SAVE
CANCEL

* Reporting party's employer(s)	Edit
Walart	EDIT
HEB	EDIT

3. Edit your answer in the cell

4. Select

(B) Reporting party's employer(s):

* Reporting party's employer
 Walmart

UPDATE/SAVE
CANCEL

* Reporting party's employer(s)	Edit
Walmart	EDIT
HEB	EDIT

5. The following will appear as your answer:

- Review information entered, if correct move on to the next question
- If new entry is wrong, repeat the EDIT steps above

(B) Reporting party's employer(s):

* Reporting party's employer

ADD/SAVE

* Reporting party's employer(s)	Edit	Delete
Walmart	EDIT	DELETE
HEB	EDIT	DELETE

* Deleting an Answer *

To DELETE an answer:

1. Select by the answer you want to remove

(B) Reporting party's employer(s):

* Reporting party's employer

* Reporting party's employer(s)	Edit	Delete
Walmart	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

ADD/SAVE

2. Select in the Message window

(B) Reporting party's employer(s):

* Reporting party's employer

Message from webpage

Are you sure you want to delete the row?

* Reporting party's employer(s)	Edit	Delete
Walmart	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
HEB	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

ADD/SAVE

3. The following will appear as your answer:

(B) Reporting party's employer(s):

* Reporting party's employer

* Reporting party's employer(s)	Edit	Delete
Walmart	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

ADD/SAVE

* How to add an Attachment *

1. Select “Attachments” from the FDR Options

OFFICE OF THE CITY CLERK
FINANCIAL DISCLOSURE REPORTING SYSTEM

FDR Options:

- Home
- Logoff
- Page 1
- Page 2
- Page 3
- Page 4
- Finalize
- Attachments ←
- ▼ Admin
 - Reports

*=Required fields

City of San Antonio

Financial Disclosure Report

For use of this Form, see Section 2-74 of the City Code of Ethics Code. Please fill this Form out online and submit it for processing. **Do not leave any block blank.** If nothing to disclose, enter **NA** or **N/A**. Click on **ADD/SAVE** button to save data. Use the **Attachments** link in the left window to attach additional documentation if needed.

2. Select to select the file you want to attach
3. File Description: type a description of file you are attaching
4. Select

OFFICE OF THE CITY CLERK
FINANCIAL DISCLOSURE REPORTING SYSTEM

FDR Options:

- Home
- Logoff
- Page 1
- Page 2
- Page 3
- Page 4
- Finalize
- Attachments
- ▼ Admin
 - Reports

Attach Supporting Materials

Select a data file to upload:

File Description:

Attached Files

Description	Delete	Edit
-------------	--------	------

5. Following message will appear: “**Attachment Uploaded Successfully**”
 - a. To delete the attachment select “Delete”
 - b. To edit the attachment select “Edit”
6. Select to return to form



* Finalizing your FDR *

1. Indicate by selecting the appropriate circle, if you would like for the public to have access to your personal information.
 - o Your personal information will be redacted if an Open Records Request is received requesting your FDR

Public Disclosure of Information

The Texas Public Information Act provides that each government official may choose whether to allow the public access to the information in the custody of the City that contains your home address, home telephone number, or reveals whether you have family members. Please note that this does not apply to business addresses, which are subject to public disclosure. If an open records request is filed requesting to view or obtain records that contain your personal information, the City will take steps to protect your personal information as authorized by the Texas Public Information Act, but only if you have elected to protect personal information.

*** I want the public to have access to my:** (Please indicate)

Home Address	<input type="radio"/> Yes <input checked="" type="radio"/> No
Home Telephone Number	<input type="radio"/> Yes <input checked="" type="radio"/> No
Family Information	<input type="radio"/> Yes <input checked="" type="radio"/> No

2. Consent to Release of Public Information

- Select box indicating you have read the Consent for Release of Public Information statement

***Consent for Release of Public Information**

I understand that if any member of the public makes a request for information included in this Financial Disclosure Report, most of the information must be disclosed under the Public Information Act. I understand that the City of San Antonio will attempt to maintain the confidentiality of highly private matters in accordance with the Texas Public Information Act. I understand that it may not be legally possible to maintain the confidentiality of such information, and I hereby release the City of San Antonio, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act or any other law requiring its release.

3. Oath

- Select box indicating you have read the statement
 - Type in name
 - Date will pre-populate

***Oath**

By clicking this box, I swear or affirm that the statements contained in this Financial Disclosure Report (Including any accompanying supplements) to the best of my knowledge and belief are true, correct, and complete.

*Enter your Name: _____ Date: prefilled

4. Last step: Click on Finalize Report

- If report was completed correctly, you will receive the following message:

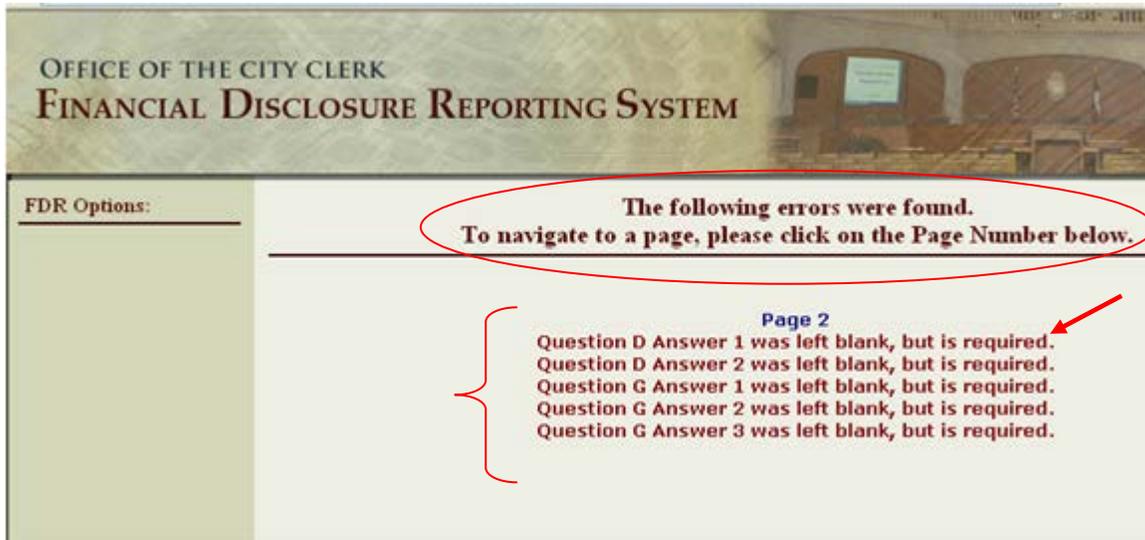
“Report Submitted Successfully”

- If you receive an Error Message in red follow instructions titled “Error when Finalizing your FDR”

*** Error when Finalizing your FDR ***

- Error Message:

1. An error message will appear in red indicating which Question(s) in the report have an error.



2. Select a Question to correct the error.
3. Use the “Previous” and “Next” buttons at the bottom of the page to navigate to the next page.



4. Once all corrections are completed you will have to finalize your Report again. Follow steps titled “Finalizing your Report.”
5. Repeat process if another error message appears.