Part 4
Entering Information into your POFD filing

This part of the presentation covers entering the required information for pages 4 through 19.
Now we start entering income information.

Here is information that will answer most questions. If you received four checks from the same employer for $400 each, then you received $1,200 in wages and must report it. But if you received four checks at $400 each from four different employers you are not required to report them since each is under $1,000.
Here is what adding a source of income looks like

Remember you have to list income for you, your spouse (if you have one) and your children (if they live with you). AS 39.50.030

You don’t need your tax information to fill this out. The income is listed in a range, not a precise number.

You must “Add Income” before moving on.

<table>
<thead>
<tr>
<th>Earned By</th>
<th>Earned By</th>
<th>Employer</th>
<th>Time</th>
<th>Description</th>
<th>Total Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filer</td>
<td>Spouse</td>
<td>Domestic Partner</td>
<td>Child</td>
<td>Total Income</td>
<td>More than $20,000 and no more than $50,000</td>
</tr>
</tbody>
</table>

You must finish adding or cancel this action before navigating away from this step.
And after pressing the blue Add Income button

You can keep adding salaried employment as needed just click here. When done click on next.
Income from Self-Employment

If you, your spouse, or any children DID NOT receive any income from self-employment, please click here and press next.

Physicians, attorneys, and others are not automatically exempt from reporting clients. Please see the exemption information on this page. See also 2 AAC 50.690 for a good faith effort to get the information.
More self employment:
You can add clients one at a time as below
Or you can keep your clients on a spreadsheet and import the information.

APOC has a template available that you can download. See the template on the next slide.
<table>
<thead>
<tr>
<th></th>
<th>Full Address Range</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>123 Address R2</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>123 Address R4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>123 Address St, Anch</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>123 Address St, Anch</td>
<td>$812.33</td>
</tr>
<tr>
<td>7</td>
<td>123 Address St, Anch</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>123 Addre R10</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>123 Address St, Sool</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>123 Addre</td>
<td>505</td>
</tr>
<tr>
<td>11</td>
<td>123 Addre</td>
<td>507</td>
</tr>
<tr>
<td>12</td>
<td>123 Address St, Anch</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>123 Address St, Anch</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>123 Addre</td>
<td>508</td>
</tr>
<tr>
<td>15</td>
<td>123 Addre</td>
<td>503</td>
</tr>
<tr>
<td>16</td>
<td>123 Address St, Anch</td>
<td></td>
</tr>
</tbody>
</table>

--- How to --- How to enter Amounts ---

**Column**
- Option 1: Enter a decimal amount that lies in the Area in one of the ranges below and Ignored range below leave the Range column blank,
- the system will translate the amount

**Option 2:**
- Enter the Range's numeric value, found below

**Option 3:**
- Enter the Range's abbreviation, found below

**Abbreviated Range Name**
- R1 - or - $0-$250  (for gift income only)
- R2 - or - $250-$1,000
- R3 - or - $1,000-$2,000
- R4 - or - $2,000-$5,000
- R5 - or - $5,000-$10,000
- R6 - or - $10,000-$20,000
Uploading will give you something like this.

When finished uploading and updating income you get this.
Rental Income
If you own property that you rent to others you will need to fill this out.

This box is available on most of the following pages. If the type of income does not apply to you click here and move on.
Rental 2
If you have a renter this is what it looks like

After entering the renter, click “Add Income”. Once you have entered all your renters you’ll click next on the rental page.
This works just like the rental income page. See slides 43 and 44.
If you have no gifts to report click here.

If you have gifts to report click here to report them.
Adding a Gift

To Whom
From Whom
What is it

Value of gift
When done click here to add the gift.
Sell your house, car, cash out your retirement account? That information goes on this page.
Disclosing Business Interests

As in other areas, you can import the information via a spreadsheet. Even if you didn’t receive income you need to list your business interests here.
Adding a business interest

To add business interests one at a time fill in the blank areas.
After you enter an interest the page will look like this

### Financial Disclosure Statement

Office Holder - Executive - Commissioner - Department of Corrections - Report Form: 1/1/2014 To: 12/31/2014

#### Schedule B: Business Interests

**Business Interests**

- Report business interests even if they were NOT a source of income, including businesses in which the filer or family member (spouse, domestic partner, dependent children and, for legislative branch filers only, nondependent children living with the filer):
  1. Served as a stockholder, owner, officer, director, partner, proprietor or held an interest.
  2. Had ownership interests of more than $1,000 in a publicly traded corporation.
  3. Had any other ownership interest in a business, including shares in non-publicly traded corporations, sole proprietorships, limited liability companies, include options to buy.
  4. Include non-profit organizations, corporations, businesses, associations, trade groups.

If the business was a source of income over $1,000, it must also be reported in Schedule A.

<table>
<thead>
<tr>
<th>Edit/Delete</th>
<th>Interested Party</th>
<th>Business</th>
<th>Position / Interest Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>3M Park</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minneapolis, Minnesota 32325</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click here to add new source of interest

10 / 19
What are Real Property Interests?
Primary residence and recreational property identification

Your primary residence and one recreational property need only be identified by zip code. All others need a more precise description.
This point can make your filing much easier. If an account is managed by a company you can simplify your report.

Here you don’t need to have received income, report if the value is over $1,000.
Beneficial interests

This account is managed by another so it does not require detail. But the filer manages this one so it needs to be detailed.
Loans and Debts

Who do you owe money to

What to report on this page

This page works like earlier pages
For most filers loans and debts will look like this

This will make your reporting easier!

Legislative filers please take note.
Government Contracts and Leases

What to report
A contract would look like this

Not many people have this to report. Notice this contract is with a county and not the state. Even contracts with municipalities need to be reported.
Natural Resource Leases

What to report

FINANCIAL DISCLOSURE STATEMENT
Office Holder - Executive - Commissioner - Department of Corrections - Report From: 1/1/2014 To: 12/31/2014

SCHEDULE F: LEASES
NONE / Not Applicable

- List natural resource leases - including mineral, timber, oil and gas leases - held, bid or offered during the reporting period.
- Report lease interests as individual, sole proprietor, family member, partnership, professional corporation, limited liability company, or corporation in which you or family (individually or together) held controlling interest.

<table>
<thead>
<tr>
<th>Lease Holder(s)</th>
<th>Lease ID</th>
<th>Status</th>
<th>Type of Interest</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Leases Found</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click here to add new source of Lease

15 / 19
Many filers won’t have to report anything here. But, make sure you are reporting if you are required to do so.
Who has to report anything on this page.

Municipal Officials and members of Boards and Commissions need not report here.
Almost There!

This is the review point and what your filing will look like after you check it and then submit it.

“Incomplete” does not mean you’ve missed a step. It means you need to review and certify before you have completed the process.
Review and make sure you’re satisfied with the information.

Anything missing? How about the PFD for the filer and spouse?

Typos show...
Don’t worry about how the words break in the fields. It is a function of the program.

More typos

If there are errors you want to fix you can save and resume later, or go to previous pages and fix it now. If it is as you want it click next.
Okay, now you’re ready to certify.
Certify here—and You’re Done!

Here is where you certify your report. By typing in your password and hitting the “Sign and Submit” button you certify that the report is complete and correct.

You are now done!