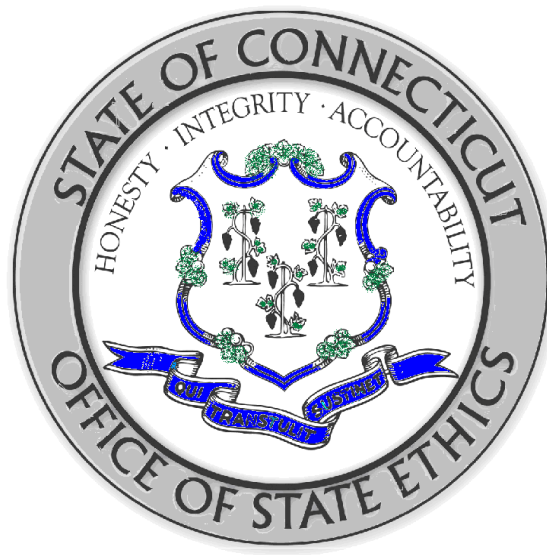


Agency Ethics Liaison Guide

Guide to the Statements of Financial Interests Filing System for Agency Ethics Liaisons



STATE OF CONNECTICUT
OFFICE OF STATE ETHICS

July 2022

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Log In

Those who are required filers can login by using their current username and password.

Those who are new users should have received an e-mail containing a username, password, and link to website.

The SFI Website can be found at this link:

<https://www.oseapps.ct.gov/sfi/Security/LoginHome.aspx>

Once logged in, those with 2 roles, “required filer” and “liaison,” will need to set their role by checking the box in front of “liaison”. See Figure 1.0



The screenshot displays the login interface for the Office of State Ethics. At the top, it reads "Office of State Ethics - Statement of Financial Interests" on the left and "Page 1 of 1" on the right. The main header features the "CT.gov" logo on the left, the text "Office of State Ethics" in the center, and a "Guide" button and "OSE Home" button on the right. Below the header, the section is titled "Select Role for Login". Underneath this title, the "Roles:" section contains four radio button options: "OSE User", "Liaison" (which is selected), "Volunteer Filer", and "SFI Administrator". Below the radio buttons are two buttons: "Continue" and "Cancel". At the bottom of the page, there is a navigation bar with links for "Home", "CT.gov Home", and "Send Feedback". Below the navigation bar, a small line of text reads "State of Connecticut Disclaimer and Privacy Policy Copyright © 2002 - 2008 State of Connecticut". The URL "https://oseapps.stag.ct.gov/sfi/User/RoleBasedLogin.aspx" is visible in the bottom left corner, and the date "7/7/2009" is in the bottom right corner.

Figure 1.0

Dashboard

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Office of State Ethics

Dashboard Maintain Filers Notify Filers Personal Profile

Statement of Financial Interests
Welcome **Ann Morgan**
[Logout](#)

Dashboard

My Message

Test SFI Message Board

2008 Filing Statistics

Agency	Total Required Filers	Filed Filers	Not Filed Filers
Agriculture	2	0	2
Department of Agriculture	8	0	8
Total	10	0	10

Liaison Overview

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https://oseapps.stag.ct.gov/sfi/Liaison/Dashboard.aspx 7/7/2009

Figure 2.0

The dashboard will display the agency for which you are the liaison. In figure 2.0 you will see the Statistics for the agency, total required filers, how many have filed or have not filed.

There is a **total** number in bold, if you click on this number you will get an excel report, listing the names, title, email address, date filed and filing type (electronic or on paper).

Last Name	First Name	Middle Initial	Agency Name	Title	Email Address	Filed Date	Filing Type
Carey	David	H	Department of Agriculture	Bureau Director, Aquaculture	davcarey@snet.net		
Kasacek	Wayne	L	Department of Agriculture	Assistant Director	wayne.kasacek@ct.gov		
Lis	Mary	J	Department of Agriculture	State Veterinarian	mary.lis@ct.gov		
morgan	Ann		Agriculture	IT Analyst	annsonny@excite.com		
Morgan	Robert		Agriculture	Financial Reporting Officer	bob.morgan@po.state.ct.us		
Pellegrino	Robert		Department of Agriculture		jessey@ina-lee@ct.gov		

Maintain Filers

Click on the “Maintain Filers” link. This is the dashboard to add new filers, edit filers, or search for filers.

To search: You can search by last name and/or first name and/or filing status and/or filter type and/or agency.

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Maintain Filers

Last Name: First Name:

Filing Status: Filer Type:

Agency:

Search Cancel Clear Add New User

Last Name	First Name	Agency	Filing Status	Filer Type	Filed Date and Time	Action
Morgan	Robert	Agriculture	Not Filed	Required Filer	-	Edit
morgan	Ann	Agriculture	Not Filed	Required Filer	-	Edit

Displaying 2 of 2 records

<https://oscapps.stag.ct.gov/sf/Liaison/MaintainFilers.aspx> 7/7/2009

Figure 3.0

To edit: After you have searched for and found the filer. Click on “Edit” over to the right under “Action”. This will display the user’s information. You can change First Name, Last Name, E-mail Address, Title/Position, and Phone Number.

Please note: If an e-mail address change has occurred, the user will receive an e-mail stating the change.

Filer Type: Two types: Required Filer or Non Required Filer.

User Status: Three types: Active, Leaving State Service, Agency Transfer.

For agency transfer, be sure select the new agency in Agency field.

Please note: If Leaving State Service, a departure date must be entered. Remember to inform the filer that a departing filing is required within 60 days after departure date. The filer is still considered a Required Filer.

Add New User

Enter First and Last Name, E-mail Address, Phone number, Agency Name (from drop down box) and Title/Position. Then click “Add”. Please note: User will receive an e-mail with a username and password. See Figure 4.0

Office of State Ethics - Statement of Financial Interests Page 1 of 1

Office of State Ethics Statement of Financial Interests
Welcome Ann Morgan [Logout](#)

[Dashboard](#) [Maintain Filers](#) [Notify Filers](#) [Personal Profile](#)

Maintain Filers

First Name: *	<input type="text" value="Ann"/>	Last Name: *	<input type="text" value="morgan"/>
Middle Initial:	<input type="text" value="M"/>	Username (Email Address): *	<input type="text" value="ann.morgan@ct.gov"/>
Phone Number: *	<input type="text" value="(860) 263 - 2393"/> ext: <input type="text"/>	Agency:*	<input type="text" value="Agriculture"/>
Filer Type:*	<input type="text" value="Required Filer"/>	User Status: *	<input type="text" value="Active"/>
Title/Position: *	<input type="text" value="IT Analyst"/> <small>Type at least 3 characters of the Title/Position</small>		

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<https://oseapps.stag.ct.gov/sfi/Liaison/MaintainFilers.aspx> 7/7/2009

Figure 4.0

Notify Filers

All emails are set in a template and approved by OSE.

Email to filed users or unfiled users or all users by Agency, Mandatory Filer or Non-Required Filers or by name.

To email all displayed, click on the box next to last name or you can pick only those you wish to e-mail. See Figure 5.0

Office of State Ethics - Statement of Financial Interests Page 1 of 1

Office of State Ethics Statement of Financial Interests
Welcome Ann Morgan
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Notify Filers

Last Name: First Name:
Filing Status: Filer Type:
Agency:

Template: *

<input type="checkbox"/>	Last Name	First Name	Agency	Filing Status	Filer Type	Filed Date and Time	Last Notified Date and Time
<input type="checkbox"/>	Carey	David	Department of Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	Kasacek	Wayne	Department of Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	Lis	Mary	Department of Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	Morgan	Robert	Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	morgan	Ann	Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	Pellegrino	Robert	Department of Agriculture	Not Filed	Required Filer	-	-
<input type="checkbox"/>	Pellegrino	Robert	Department of Agriculture	Not Filed	Required Filer	-	-

Displaying 10 of 10 records

[Notify](#)

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<https://oseapps.stag.ct.gov/sfi/Liaison/NotifyFilers.aspx> 7/7/2009

Figure 5.0

Personal Profile

Figure 6.0 is your personal information. You can edit your personal information, change your password or change your e-mail address all under this tab.

Office of State Ethics - Statement of Financial Interests Page 1 of 1

Statement of Financial Interests
Welcome Ann Morgan
[Logout](#)

Dashboard Maintain Filers Notify Filers **Personal Profile**

Personal Information

[Edit Personal Information](#) | [Change Password](#) | [Change Email Address](#)

First Name: *	<input type="text" value="Ann"/>
Middle Initial:	<input type="text"/>
Last Name: *	<input type="text" value="Morgan"/>
Phone Number: *	(<input type="text" value="860"/>) <input type="text" value="263"/> - <input type="text" value="6398"/> ext: <input type="text" value="2393"/>
Email Address: *	<input type="text" value="ann.morgan@ct.gov"/>
Title/Position: *	<input type="text" value="Information Technology Analyst III"/> <small>Type at least 3 characters of the Title/Position</small>
Agency: *	<input type="text" value="Office of State Ethics"/> <small>Type at least 3 characters of the Agency</small>

[Save](#) [Cancel](#)

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<https://oseapps.stag.ct.gov/sfi/User/PersonalProfile.aspx> 7/7/2009

Figure 6.0

Contact Us

Carol Carson, *Executive Director*

Agency Address:

Office of State Ethics
18-20 Trinity Street, Suite 205
Hartford, CT 06106-1660
Main Phone Number: 860-263-2400
Fax Number: 860-263-2402

Statement of Financial Interest Filing System Support

Ann Morgan, IT Technical Analyst II
(860) 263-2393
ann.morgan@ct.gov

Advice Regarding

Code of Ethics:	ethics.code@ct.gov
Lobbyist Filing/Reporting Questions:	lobbyist.ose@ct.gov
Public Official Filing/Reporting Questions:	sfi.ose@ct.gov
Enforcement:	ethics.enforcement@ct.gov
All Other Inquiries:	ose@ct.gov