

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

Introduction

This tutorial will cover instructions on how.

- How to create a new EDS document in the Online EDS system.
- How to save data entry work into an EDS document to prevent data loss.
- How to access various help resources.
- How to provide ownership information.
- How to review errors and warnings.
- Sign an EDS document for submission with your electronic signature.
- Print the Certificate of Filing to submit your bid or proposal package to the City.

Below is high-level diagram of the EDS document creation process:

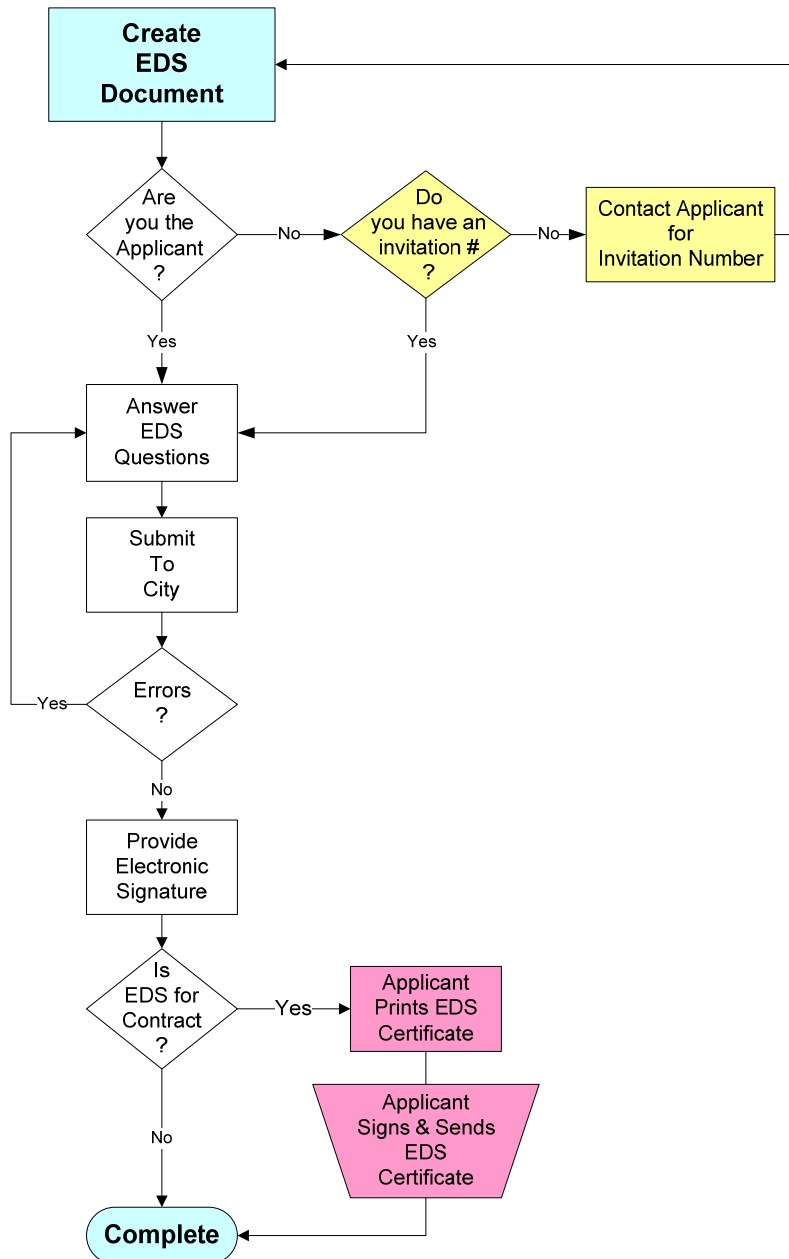


Figure 1 - Create New EDS Process Flow

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Create New EDS Document

Section 1. How to create a new EDS document.

- 1a. To create a new EDS document, click on the “Create New” link from the Left Menu.

City of Chicago
Electronic Knowledge Interchange Three III
Henry EKI
My Profile | Logout

My EDS ♦ Create New

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Create New EDS ?

Fill out the initial information to create an EDS document, then click the "Fill out EDS" button.

If you are the applicant (prime contractor) you SHOULD NOT use an invitation number. If you are not the applicant (you represent an owner), you MUST use an invitation number. You may find the EDS invitation in the Drafts section of My EDS.

Do you have an EDS invitation number? Yes No

Enter the EDS invitation number

Is this an EDS for a contract or an annual EDS information update? Contract Annual EDS Information Update

Please select the business address for this EDS. If the address is not listed, please contact your EDS Captain who will make changes through the Site Administration link.

33 W Monroe

Please select the contact person for this EDS.

Henry EKI

Fill out EDS Cancel

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Figure 2 - Create New EDS Screen

- 1b. On the Create New EDS screen, provide the following information:

- **Contract Related EDS or Annual EDS Information Update**
 - Select “Contract”, if you are submitting an EDS document in connection with a bid, RFP, RFQ response, task order, sole source agreement, or an amendment, extension, or modification of an existing City contract; otherwise
 - Select “Annual EDS Information Update”, if you are submitting an EDS document to provide updates to your company’s EDS information for reasons which may include:
 - ❖ You were notified by the City that your company needs to submit an EDS information update; or
 - ❖ Your company information has changed.
- **EDS Invitation number**
 - Applicable only to owners who received an invitation via email to submit an EDS document.

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NOTE:

- The Invitation number can be found in an email sent to your company as a request to submit an EDS document.
- If you are submitting an EDS document as an owner, make sure you have an invitation number. **DO NOT file an EDS document as an owner without an invitation number!**

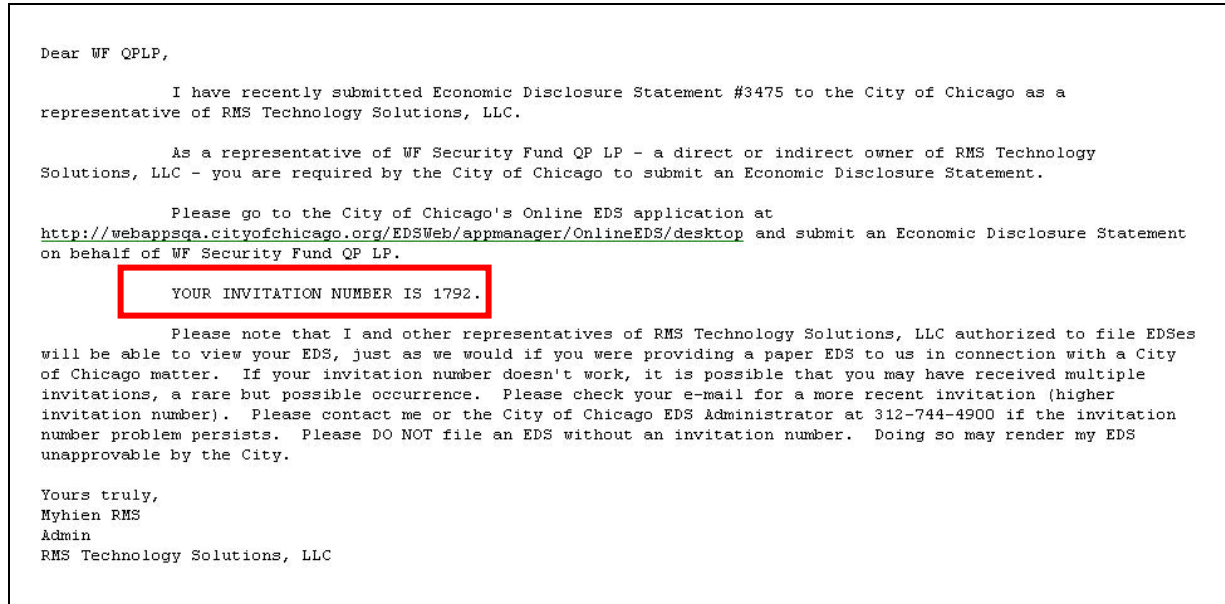


Figure 3 - Invitation Email

- **Site** – Select a site that is specific to the EDS document that you are creating.

NOTE: You may ask the EDS Captain(s) within your company to add, delete, or change site information.

- **Contact** – Select a person within your company to be contacted via email, phone, etc. related to this EDS document.

NOTE: If contact person is not in the selection list, then that person needs to be registered and be approved for an Online EDS user account.

1c. Click “Fill Out EDS” button after you have completed data entry on the Create New EDS screen.

- Based on the answers you provided, questions on your EDS document will change either on the same screen or subsequent screen(s).

NOTE: Each EDS document will contain a set of EDS questions. You will only be asked questions pertinent to the type of EDS you are creating.



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Create New EDS Document

Section 2. Logistics

2a. Navigation within an EDS document – Keep the following concepts in mind as you are creating a new EDS document or revising an existing EDS document.

- You may navigate within an EDS document as follows:
 - By clicking on any of the **tabs** to jump to a specific section within an EDS document.
 - By clicking on “Previous” or “Next” **buttons** to go to previous or next screen within an EDS document.

DO NOT USE the BACK  button or the FORWARD  button on your Internet browser at any time while you are using the Online EDS system.

NOTE: Questions will be asked based on answers to previous questions. Therefore, as you navigate through an EDS document, the questions and tabs may differ depending on previous answers.



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Captain EKI
My Profile | Logout

My EDS ♦ EDS In Process #5257

Fill out the EDS questions for this page.

General Information | Ownership Interests | Business Relation... | Certifications | Acknowledgements

City Comments

SECTION II -- DISCLOSURE OF OWNERSHIP INTERESTS

A. NATURE OF DISCLOSING PARTY

1. Indicate the nature of the Disclosing Party:

- Person or sole proprietor
- Publicly registered business corporation
- Privately held business corporation
- General partnership or joint venture
- Limited partnership
- Trust
- Limited liability company
- Limited liability partnership
- Not-for-profit corporation
- ESOP (Employee Stock Ownership Plan)
- Estate
- Other

Previous | Next | Ready to Submit | Save | Cancel

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Figure 4 – Tab and Button Samples

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Create New EDS Document

2b. Incremental Saves

- Click “Save” at anytime to save your work. Your EDS document will be saved in “Draft” status and can be found in the “Drafts” link. Once you exit the EDS document, it may be retrieved for further revision either by you or another EDS user within your company.
- Verify that the message “EDS was saved successfully” is displayed before continuing.
- Click “Cancel” to abandon your changes.

TIP: Save and save often!!!

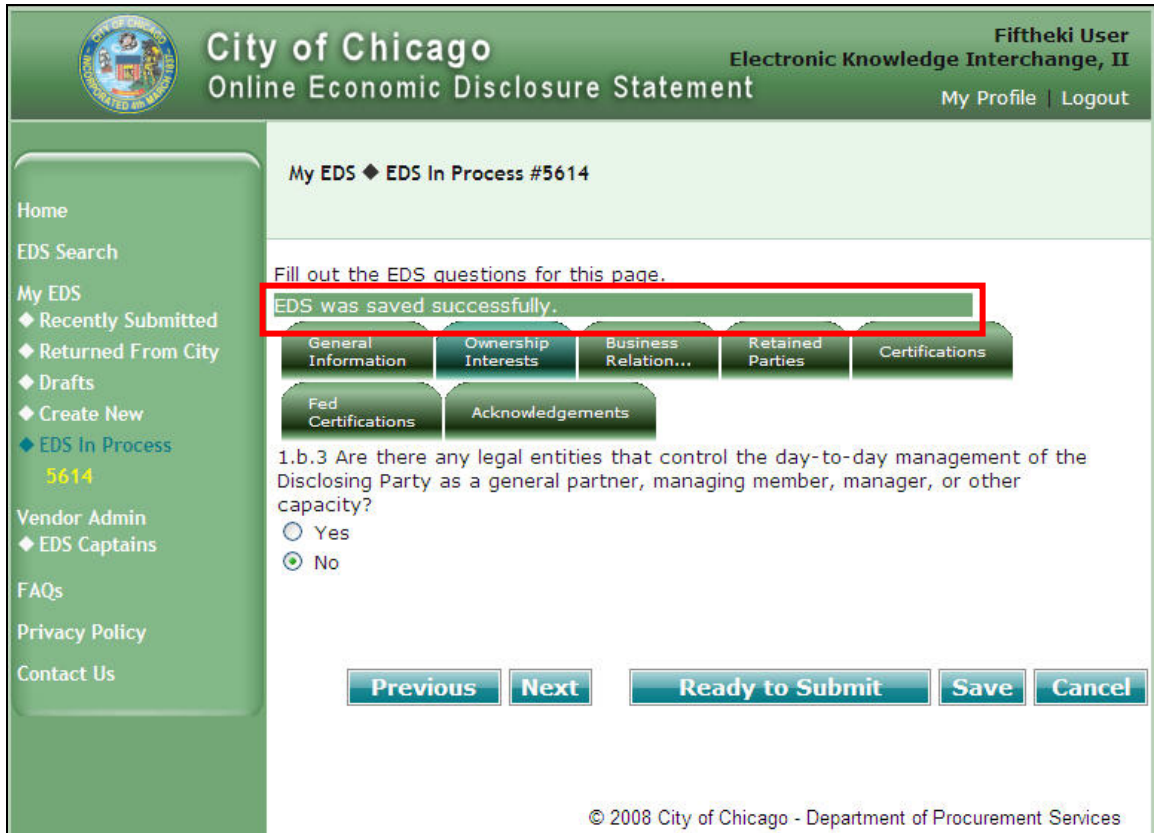


Figure 5 - Saved Successfully Message

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2c. How to answer each type of questions

2.c.1. **Textbox** – Type your answer to the question into the textbox.

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My EDS ♦ EDS In Process #5492

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Fill out the EDS questions for this page.

General Information Ownership Interests Business Relation... Retained Parties Certifications
Fed Certifications Acknowledgements

F. Brief description of contract, transaction or other undertaking (referred to below as the "Matter") to which this EDS pertains: ?

G. Is the Matter is a contract being handled by the City's Department of Procurement Services? ?
 Yes
 No

Specification Number ?
Contract Number ?
Revision Number (leave blank if unsure) ?
Release Number (only for task orders) ?
User Department Project Number (leave blank if unsure) ?

Previous Next Ready to Submit Save Cancel

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Figure 6 - Textbox Sample

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2.c.2. Radio Buttons

- For each question with a set of radio button answers, you may select only ONE answer per question. To select an answer, click on the button next to the most appropriate answer. The selected button is filled in.
- Initially, upon entry to a screen, an answer may have been pre-selected. You may change the answer at any time.

The screenshot displays the City of Chicago Online Economic Disclosure Statement (EDS) interface. The header includes the City of Chicago logo, the text "City of Chicago Online Economic Disclosure Statement", and user information: "Fifteki User Electronic Knowledge Interchange, II" with links for "My Profile" and "Logout". The main content area shows "My EDS" with a diamond icon and "EDS In Process #5492". Below this, there are navigation tabs for "General Information", "Ownership Interests", "Business Relation...", "Retained Parties", and "Certifications". The "Ownership Interests" tab is active, showing "SECTION II -- DISCLOSURE OF OWNERSHIP INTERESTS". Under "A. NATURE OF DISCLOSING PARTY", question 1 asks to "Indicate the nature of the Disclosing Party:". The radio button options are: "Person or sole proprietor", "Publicly registered business corporation", "Privately held business corporation", "General partnership or joint venture", "Limited partnership" (which is selected and highlighted with a red box), "Trust", "Limited liability company", "Limited liability partnership", "Not-for-profit corporation", "ESOP (Employee Stock Ownership Plan)", "Estate", and "Other". Below the radio buttons, there is a question: "Is the Disclosing Party incorporated or organized in the State of Illinois?" with radio button options "Yes" and "No". At the bottom of the form, there are buttons for "Previous", "Next", "Ready to Submit", "Save", and "Cancel". The footer contains the copyright notice: "© 2008 City of Chicago - Department of Procurement Services".

Figure 7 - Radio Button Sample

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2.c.3. Dropdown

- Click on the arrow in the dropdown box for the dropdown list, and then click on the value that is the most appropriate.
- Sometimes, upon entry to a screen, an answer may have been pre-selected; you may change the answer at any time. Other times, the answer is blank. In that case, you must select an answer from the dropdown list.

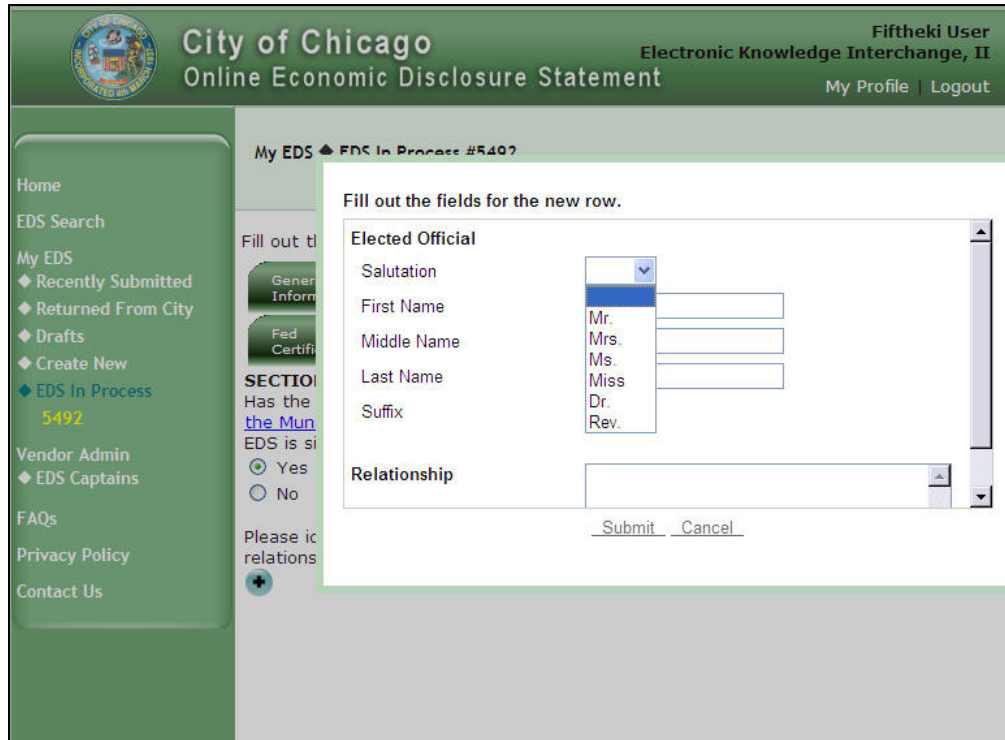


Figure 8 - Dropdown Sample

2.c.4. Checkbox

- For each question with a set of checkbox answers, you may select more than one answer. To select answers, click on the checkboxes next to all answers that apply.

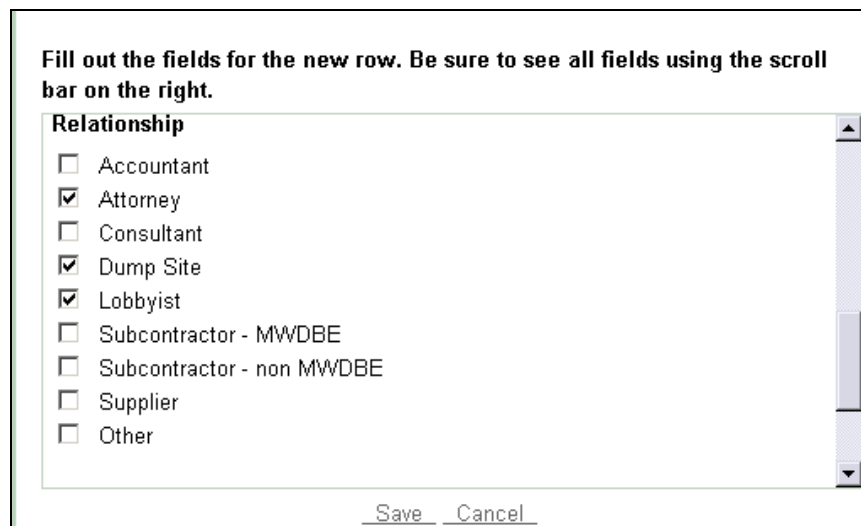


Figure 9 - Checkbox Sample

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2.c.5. Grayed Out Fields

- Grayed out fields contain data that may not be changed during data entry.

NOTE: Generally, grayed out fields are populated based on prior answers or on your company's information, which may be corrected as follows:

- If you selected the incorrect site or contact, then you will need to click "Cancel" to end this EDS document and click "Create New" to start a new EDS document.
- If your company name, site information, or contact name is incorrect, then contact your EDS Captain to correct.

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My EDS ♦ EDS In Process #5497

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Fill out the EDS questions for this page.

General Information Ownership Interests Business Relation... Certifications Acknowledgements

SECTION I -- GENERAL INFORMATION

A. Legal name of Disclosing Party submitting the EDS: Changes to the legal name must be made by the EDS Captain in **Site Administration** and will affect all EDSes filed by the Disclosing Party.

Electronic Knowledge Interchange, II

Enter d/b/a if applicable:

The Disclosing Party submitting this EDS is:

the Applicant
 a legal entity holding a direct or indirect interest in the Applicant
 a specified legal entity with a right of control in the Applicant

B. Business address of Disclosing Party:

Address Line 1: 33 W Monroe St
Address Line 2:
Address Line 3:
City: Chicago
Country: United States
State: IL
Zip Code: 60603

C. Telephone:
312-888-9999

Fax:

Email:
edsmail99@yahoo.com

D. Name of contact person:
Captain EKI

E. Federal Employer Identification No. (if you have one):

Previous Next Ready to Submit Save Cancel

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Figure 10 - Samples of Grayed Out Fields

2.c.6. Data Entry Window

▪ Add information via Data Entry Window

- For an answer that may require multiple pieces of information, a data entry window will pop up to allow you to enter multiple pieces of information.

Example: On the Retained Parties information screen, for each retained party you are adding, a pop up window is displayed for you to enter answers pertaining to each retained party.

- Click  button to pop up the data entry window.

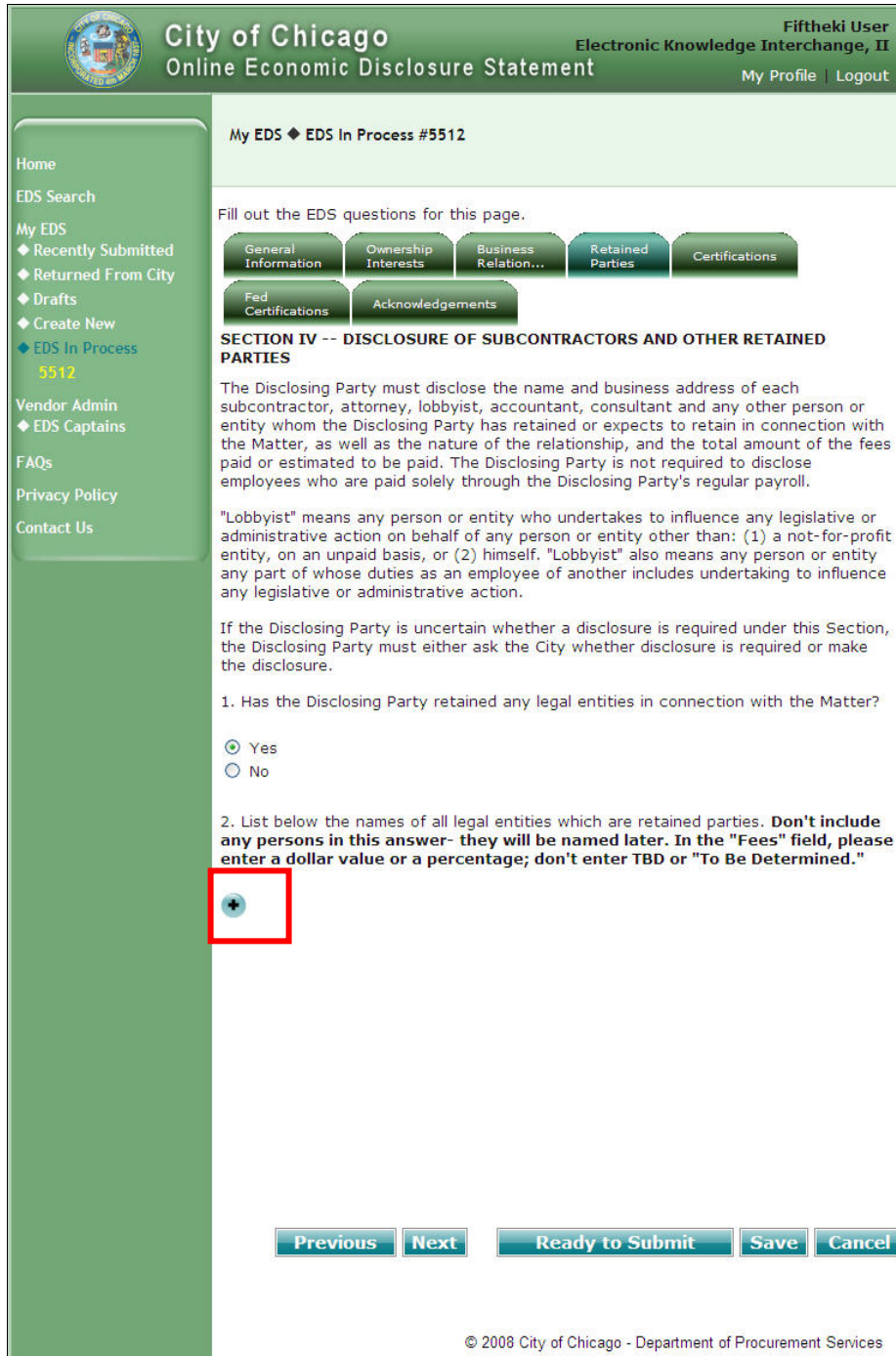


Figure 11 - Data Entry Window Sample - Screen 1

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- o In the Data Entry window, enter information in the fields, then click "Save" to save the information, or click "Cancel" to cancel changes.

SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES

The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist, accountant, consultant and any other person or entity whom the Disclosing Party has retained or expects to retain in connection with the Matter, as well as the nature of the relationship, and the total amount of the fees paid or expected to be paid.

Fill out the fields for the new row.

Name

Anticipated/Retained

Anticipated
 Retained

Business Address

Address Line 1
Address Line 2
Address Line 3


1. Has the Disclosing Party retained or expects to retain any person or entity, other than an employee, in connection with the Matter? If the Disclosing Party has retained or expects to retain any person or entity, list the name of the person or entity, the nature of the relationship, and the total amount of the fees paid or expected to be paid.

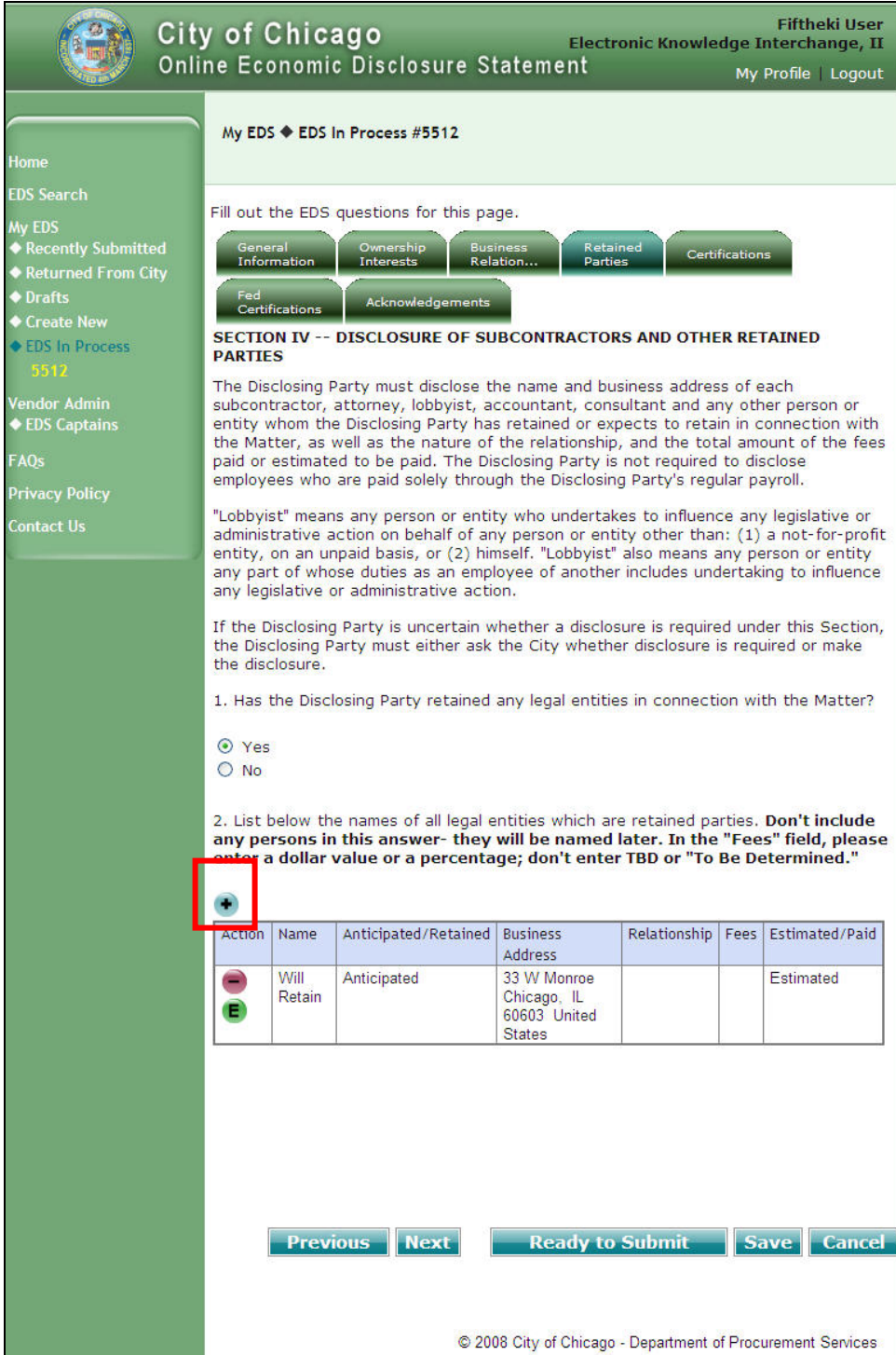
Yes
 No

2. List below any persons in this answer- they will be named later. In the "Fees" field, please enter a dollar value or a percentage; don't enter TBD or "To Be Determined."

Figure 12 - Data Entry Window Sample – Screen 2

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- o After you click “Save”, the new set of answers will be displayed.
- o To add additional information, click the  button to pop up another Data Entry window.



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My EDS ♦ EDS In Process #5512

Fill out the EDS questions for this page.

General Information Ownership Interests Business Relation... Retained Parties Certifications
 Fed Certifications Acknowledgements

SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES

The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist, accountant, consultant and any other person or entity whom the Disclosing Party has retained or expects to retain in connection with the Matter, as well as the nature of the relationship, and the total amount of the fees paid or estimated to be paid. The Disclosing Party is not required to disclose employees who are paid solely through the Disclosing Party's regular payroll.


"Lobbyist" means any person or entity who undertakes to influence any legislative or administrative action on behalf of any person or entity other than: (1) a not-for-profit entity, on an unpaid basis, or (2) himself. "Lobbyist" also means any person or entity any part of whose duties as an employee of another includes undertaking to influence any legislative or administrative action.



If the Disclosing Party is uncertain whether a disclosure is required under this Section, the Disclosing Party must either ask the City whether disclosure is required or make the disclosure.

1. Has the Disclosing Party retained any legal entities in connection with the Matter?

Yes
 No

2. List below the names of all legal entities which are retained parties. **Don't include any persons in this answer- they will be named later. In the "Fees" field, please enter a dollar value or a percentage; don't enter TBD or "To Be Determined."**



| Action | Name | Anticipated/Retained | Business Address | Relationship | Fees | Estimated/Paid |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|----------------------|---------------------------------------------------|--------------|------|----------------|
|   | Will Retain | Anticipated | 33 W Monroe Chicago, IL 60603 United States | | | Estimated |

Previous Next Ready to Submit Save Cancel

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Figure 13 - Data Entry Window Sample – Screen 3

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- To edit information that you entered using the Data Entry window:
 - Click the **E** button next to the answer you wish to change.

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My EDS ♦ EDS In Process #5614

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Fill out the EDS questions for this page.

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1.b.3 Are there any legal entities that control the day-to-day management of the Disclosing Party as a general partner, managing member, manager, or other capacity?
 Yes
 No

1.b.4 List all legal entities that function as general partners, managing members, managers, and any others who control the day-to-day management of the Disclosing Party. Each legal entity listed below must submit an EDS on its own behalf.

| Action | Name | Title | Business Address |
|-----------------------------------------------------------------------------------|-------------------|-------|---------------------------------------------|
|  | EKI Onwer Company | | 33 W Monroe Chicago, 60603 United States |

Previous Next Ready to Submit Save Cancel

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Figure 14 - Edit Information Screen 1

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Create New EDS Document

- Change information as needed in the Data Entry popup window then click “Save”.

The screenshot shows the 'City of Chicago Online Economic Disclosure Statement' interface. The user is logged in as 'Captain EKI'. The main page displays 'My EDS' with a dropdown arrow and 'EDS In Process #6336'. A popup window titled 'Fill out the fields to change this row.' is open, showing the following information:

- Name:** EKI Onwer Company
- Title:** (Empty field)
- Business Address:**
 - Address Line 1: 33 W Monroe
 - Address Line 2: Modified Example
 - Address Line 3: (Empty field)
 - City: Chicago
 - Country: United States

At the bottom of the popup, there are 'Save' and 'Cancel' buttons. The background interface includes a navigation menu on the left with options like 'Home', 'EDS Search', 'My EDS', 'Vendor Admin', 'Support', etc.

Figure 15 - Edit Information Screen 2

- Verify that information displayed has been changed.

The screenshot shows the 'City of Chicago Online Economic Disclosure Statement' interface. The user is logged in as 'Fiftheiki User'. The main page displays 'My EDS' with a dropdown arrow and 'EDS In Process #5614'. The interface shows various tabs for editing information: 'General Information', 'Ownership Interests', 'Business Relation...', 'Retained Parties', 'Certifications', 'Fed Certifications', and 'Acknowledgements'. Below the tabs, there are two questions:

1.b.3 Are there any legal entities that control the day-to-day management of the Disclosing Party as a general partner, managing member, manager, or other capacity?
 Yes
 No


1.b.4 List all legal entities that function as general partners, managing members, managers, and any others who control the day-to-day management of the Disclosing Party. Each legal entity listed below must submit an EDS on its own behalf.

| Action | Name | Title | Business Address |
|--------|-----------------------------|-------|-----------------------------------------------------------------|
| | EKI Onwer Company (Changed) | | 33 W Monroe Modified Example Chicago, 60603 United States |

At the bottom of the screen, there are buttons for 'Previous', 'Next', 'Ready to Submit', 'Save', and 'Cancel'. The footer text reads '© 2008 City of Chicago - Department of Procurement Services'.

Figure 16 - Edit Information Screen 3

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- Remove information that you entered via the Data Entry window:
 - Click the  button next to the answer you wish to remove.



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Online Economic Disclosure Statement

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My Profile | Logout

My EDS ♦ EDS In Process #5614

Fill out the EDS questions for this page.

General Information Ownership Interests Business Relation... Retained Parties Certifications
Fed Certifications Acknowledgements

1.b.3 Are there any legal entities that control the day-to-day management of the Disclosing Party as a general partner, managing member, manager, or other capacity?
 Yes
 No

1.b.4 List all legal entities that function as general partners, managing members, managers, and any others who control the day-to-day management of the Disclosing Party. Each legal entity listed below must submit an EDS on its own behalf.

| Action | Name | Title | Business Address |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-------|-----------------------------------------------------------------|
|   | EKI Onwer Company (Changed) | | 33 W Monroe Modified Example Chicago, 60603 United States |

Previous Next Ready to Submit Save Cancel

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Figure 17 - Remove Information Screen 1

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- o Verify that information was removed.

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My EDS ♦ EDS In Process #5614

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Fill out the EDS questions for this page.

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1.b.3 Are there any legal entities that control the day-to-day management of the Disclosing Party as a general partner, managing member, manager, or other capacity?
 Yes
 No

1.b.4 List all legal entities that function as general partners, managing members, managers, and any others who control the day-to-day management of the Disclosing Party. Each legal entity listed below must submit an EDS on its own behalf.
+

Previous Next Ready to Submit Save Cancel

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Figure 18 - Remove Information Screen 2


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Section 3. Help and Additional Information

There are several types of help available to you. We recommend that you use help in the order suggested below:

3.a.1. **Context Sensitive Help and Additional Information** – As you are creating or revising an EDS document, help may be available as follows:

- Underlined text – Click on the underlined text such as [Affiliated Entity](#) to view additional information in a pop up window.
- “Question Mark” button – Click on the  to view additional information in a pop up window.



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2. Neither the Disclosing Party, nor any [Applicable Party](#), nor any [Affiliated Entity](#) of either the Disclosing Party or any [Applicable Party](#) nor any Agents have, during the five years before the date this EDS is signed, or, with respect to an [Applicable Party](#), an [Affiliated Entity](#), or an [Affiliated Entity](#) of an [Applicable Party](#) during the five years before the date of such [Applicable Party's](#) or [Affiliated Entity's](#) contract or engagement in connection with the Matter:

- bribed or attempted to bribe, or been convicted or adjudged guilty of bribery or attempting to bribe, a public officer or employee of the City, the State of Illinois, or any agency of the federal government or of any state or local government in the United States of America, in that officer's or employee's official capacity;
- agreed or colluded with other bidders or prospective bidders, or been a party to any such agreement, or been convicted or adjudged guilty of agreement or collusion among bidders or prospective bidders, in restraint of freedom of competition by agreement to bid a fixed price or otherwise; or
- made an admission of such conduct described in a. or b. above that is a matter of record, but have not been prosecuted for such conduct; or
- violated the provisions of [Municipal Code Section 2-92-610 \(Living Wage Ordinance\)](#).

I certify the above to be true
 I am unable to certify the above to be true

Previous Next Ready to Submit Save Cancel

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Figure 19 - Context Sensitive Help/Information Sample

3.a.2. **Online EDS training manuals and videos** are available in the left menu to provide instructions on how to use the Online EDS system.

3.a.3. **You may call your City Contact person.**

Section 4. Ownership Interests

Introduction

In the Ownership Interests section of the EDS document, you will provide answers pertaining to the control and ownership of your company.

You must indicate the type of legal entity (such as publicly held, or privately held, etc.), and specific the following information:

- Officers and Directors
- Controlling Interests
- Titleholders
- Ownership Information

When entering your ownership information, a key difference from the current process is the applicant must define the entire ownership structure which includes direct owner(s) as well as subsequent levels of ownership.

Some concepts related to ownership information are:

- Applicant refers to prime vendor seeking a contract with the City.
- Parent refers to legal entity that is a direct owner of the applicant.
- Owners of parents are referred to as grandparents, etc.
- Invitation refers to the process of requesting parents and grandparents, etc. to fill out EDS documents related to the matter.
- Recertify means that the applicant has knowledge that the owner's previous EDS document has not changed, and is attesting this information is still true and correct.


NOTE: Re-certifications are normally done by vendors who frequently bid on matters with the City. This reduces the burden on owners and expedites the contracting process.

- Only substantial owners are required to fill out an EDS document. Substantial owners are currently defined as owners owning in excess of 7.5% interest in the applicant.


Online Economic Disclosure Statement - Instruction Manual

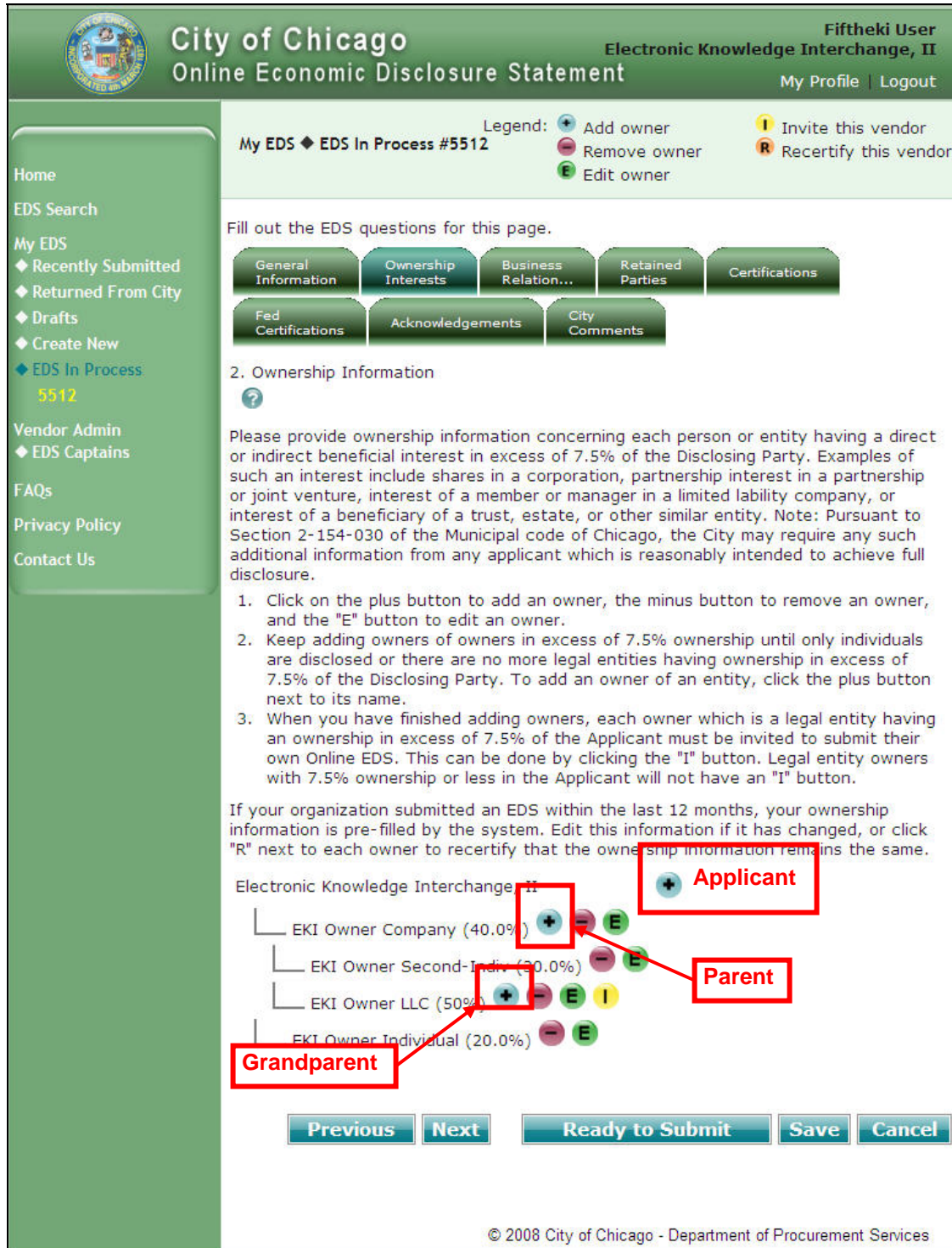
Create New EDS Document

- How to Add an Owner

- On the Ownership Information screen, click on the  button to add an owner.


NOTE: Click on the  button next to the **applicant** to add a **parent**. A parent is the first level of indentation under the applicant.






Click on the  button next to the **parent** to add a **grandparent**. A grandparent is the first level of indentation under a parent, or the second level of indentation under the applicant.



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My EDS  EDS In Process #5512

Legend:  Add owner  Remove owner  Edit owner  Invite this vendor  Recertify this vendor

Fill out the EDS questions for this page.

General Information Ownership Interests Business Relation... Retained Parties Certifications
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




2. Ownership Information

Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.

- Click on the plus button to add an owner, the minus button to remove an owner, and the "E" button to edit an owner.
- Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the plus button next to its name.
- When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the "I" button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an "I" button.

If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.

Electronic Knowledge Interchange, II

| | | | | | |
|--------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| EKI Owner Company (40.0%) |  |  |  |  |  |
| EKI Owner Second-Indiv (20.0%) |  |  |  |  |  |
| EKI Owner LLC (50%) |  |  |  |  |  |
| EKI Owner Individual (20.0%) |  |  |  |  |  |

Applicant **Parent** **Grandparent**

Previous Next Ready to Submit Save Cancel

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Figure 20 - Sample Ownership Screen

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- On the next Add Owner screen, specify if the owner is an individual or a legal entity.

City of Chicago
Online Economic Disclosure Statement

Fiftheke User
Electronic Knowledge Interchange, II
My Profile | Logout

Add Owner

Is the owner you wish to add an individual or a legal entity?

Individual
 Legal Entity

Next **Cancel**

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Figure 21 - Add Owner Screen 1

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

- If you specify a legal entity as an owner, then on the next Add Owner screen, perform ONE of the following steps then click “Next”:
 - If you know the owner’s city-assigned vendor number then select “Yes” and enter the vendor number; or
 - If you know the owner’s FEIN or SSN then select “Yes” and enter the FEIN or SSN; or
 - Otherwise, enter the most unique part of owner’s vendor name.

Enter a key word or partial word that is unique to your owner’s vendor name. The system will try to find the owner in our records.

TIPS to find the most complete list of likely matches:

- One word or partial word provides the best search results.
- Enter a fragment or a key word that is unique to your company name.
- Do not enter company suffixes such as “inc”, “co”, etc.
- **Example:** If the name of the company is “Fred Jones & Sons Co.”, for best results, enter “Fred Jones” only. DO NOT use special characters such as “&”, and “co”.

The screenshot shows the 'Add Vendor Owner' screen in the City of Chicago's Online Economic Disclosure Statement system. The page features a green header with the City of Chicago logo and the text 'City of Chicago Online Economic Disclosure Statement'. In the top right corner, it displays the user 'Fiftheiki User' and 'Electronic Knowledge Interchange, II', along with links for 'My Profile' and 'Logout'. A left sidebar contains navigation options: Home, EDS Search, My EDS (with sub-items: Recently Submitted, Returned From City, Drafts, Create New, EDS In Process with a count of 5512), Vendor Admin (with sub-item: EDS Captains), FAQs, Privacy Policy, and Contact Us. The main content area is titled 'Add Vendor Owner' and includes the following text: 'The add vendor owner process will use the following information to find a match to an existing vendor record in our database.' Below this are three questions with radio buttons for 'Yes' and 'No': 'Do you know your vendor owner's city-assigned vendor number?' (No selected), 'Do you know your vendor owner's tax id number (FEIN or SSN)?' (No selected), and 'FEIN / SSN'. There are input fields for 'Vendor Number', 'FEIN / SSN', and 'Vendor Name'. At the bottom right are three buttons: 'Previous', 'Next', and 'Cancel'. The footer contains the copyright notice: '© 2008 City of Chicago - Department of Procurement Services'.

Figure 22 - Add Owner Screen 2

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- Based on the owner's information you entered on the previous screen, one of the following scenarios is possible:
 - Scenario 1 – A match is found where the last 4 digits of the FEIN/SSN or Vendor Number matches that of your company.
 - ❖ Click on the button next to the owner's name.
 - Scenario 2 – One or more matches are found, but the owner is not listed.
 - ❖ Click on the button next to the "Add my information as a new vendor".
 - ❖ Enter owner's information in the appropriate fields.
 - Scenario 3 – NO match is found.
 - ❖ The button next to the "Add my information as a new vendor" is already selected.
 - ❖ Enter owner's information in the appropriate fields.

Click on "Next" to proceed to next page, or "Previous" to return to previous page, or "Cancel" to end the registration process.

City of Chicago
Online Economic Disclosure Statement

Fiftheiki User
Electronic Knowledge Interchange, II
My Profile | Logout

Add Owner

Add Vendor Owner

Vendor you entered : EKI LLC

| Vendor Name | Vendor #/ FEIN or SSN | Address |
|---------------------------------------------------|--------------------------|------------------------------------------------------------------------------------|
| <input checked="" type="radio"/> EKI LLC Tertiary | UNKNOWN/ UNKNOWN | <input checked="" type="radio"/> 33 W Monroe St Chicago, IL 60603 United States |

OR

Add my information as a new vendor.

FEIN / SSN

Vendor Name *

Address Line 1 *

Address Line 2

Address Line 3

City *

Country *

State *

Zip Code *

* - Required Field

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Figure 23 - Add Owner Screen 3

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- Enter the owner's percentage of ownership stake including direct and indirect beneficial interests, then click "Next".

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Electronic Knowledge Interchange, II
Online Economic Disclosure Statement My Profile | Logout

Add Owner

Percentage ownership
Finally, for existing or new vendors, enter the amount of the ownership stake.

Percentage of ownership stake %

[Previous](#) [Next](#) [Cancel](#)

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- Review ownership information for accuracy, then click on "Add Owner" to complete the process, or "Previous" to return to the previous page, or "Cancel" to end the process.

City of Chicago Fiftheiki User
Electronic Knowledge Interchange, II
Online Economic Disclosure Statement My Profile | Logout

Add Owner

Review Owner Information
Please review the owner information you have selected. If you are satisfied that the information is accurate, click Add Owner to complete the process. If changes are necessary, click Previous to edit the information.

Vendor Name: EKI LLC Tertiary

Address: 33 W Monroe St
Chicago, IL 60603 United States

Percent owned: 50

[Previous](#) [Add Owner](#) [Cancel](#)

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Figure 24 - Review New Owner Information Screen

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- After you have successfully added an owner, you will return to the Ownership page which displays the new owner in the ownership tree.

City of Chicago
Electronic Knowledge Interchange, II
Online Economic Disclosure Statement

Fiftheke User
My Profile | Logout

My EDS ♦ EDS In Process #5512

Legend: + Add owner, - Remove owner, E Edit owner, I Invite this vendor, R Recertify this vendor

Fill out the EDS questions for this page.

General Information, Ownership Interests, Business Relation..., Retained Parties, Certifications, Fed Certifications, Acknowledgements

2. Ownership Information

Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.

1. Click on the plus button to add an owner, the minus button to remove an owner, and the "E" button to edit an owner.
2. Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the plus button next to its name.
3. When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the "I" button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an "I" button.

If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.

Electronic Knowledge Interchange, II

- EKI Owner Company (40.0%) [-] [E] [I] [R]
- EKI Owner Second-Indiv (50.0%) [-] [E]
- EKI Owner LLC (50.0%) [+ [-] [E]
- EKI LLC Tertiary (50%) [+ [-] [E] [I]**
- EKI Owner Individual (30.0%) [-] [E]
- EKI Owner Removal (30.0%) [-] [E]

Previous Next Ready to Submit Save Cancel


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Figure 25 - Owner Added Screen

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

4a. Remove an owner

- To remove an owner, click on the  button next to the owner you wish to remove. The removed owner will no longer be displayed on the screen.

NOTE: If you remove a vendor that has its own owner(s) then those owners will be removed as well.

Example: If you remove the "EKI Owner LLC" vendor then both the vendor and its owner, "EKI Owner Tertiary" will be removed.



City of Chicago
Online Economic Disclosure Statement

Captain EKI
Electronic Knowledge Interchange, II
My Profile | Logout

My EDS ♦ EDS In Process #5512

Legend: + Add owner, - Remove owner, E Edit owner, I Invite this vendor, R Recertify this vendor

Fill out the EDS questions for this page.

2. Ownership Information

Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal Code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.

1. Click on the plus button to add an owner, the minus button to remove an owner, and the "E" button to edit an owner.
2. Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the plus button next to its name.
3. When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the "I" button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an "I" button.

If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.

Electronic Knowledge Interchange, II


- EKI Owner Company (40%) - E I
- EKI Owner Second Indiv (50%) - E
- EKI Owner LLC (50%) - E I**
- EKI Owner Tertiary (100%) - E
- EKI Owner Individual (30%) - E
- EKI Owner Removal (30%) - E

Previous Next Ready to Submit Save Cancel

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Figure 26 - Remove Owner Sample






Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- After you click on the  button, confirm that the owner and its parents and any grandparents are no longer displayed in the ownership tree.

City of Chicago
Online Economic Disclosure Statement

Fiftheiki User
 Electronic Knowledge Interchange, II
 My Profile | Logout

My EDS ♦ EDS In Process #5512

Legend:  Add owner  Remove owner  Edit owner  Invite this vendor  Recertify this vendor

Fill out the EDS questions for this page.












2. Ownership Information

Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.

- Click on the plus button to add an owner, the minus button to remove an owner, and the "E" button to edit an owner.
- Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the plus button next to its name.
- When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the "I" button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an "I" button.

If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.

Electronic Knowledge Interchange, II

| | | | | | | |
|--------------------------|--------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> | EKI Owner Company (40.0%) |  |  |  |  |  |
| <input type="checkbox"/> | EKI Owner Second-Indiv (50.0%) | |  |  | | |
| <input type="checkbox"/> | EKI Owner Individual (30.0%) | |  |  | | |
| <input type="checkbox"/> | EKI Owner Removal (30.0%) | |  |  | | |

Previous **Next** **Ready to Submit** **Save** **Cancel**

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Figure 27 - Entire Branch of Owner Removed Sample

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Create New EDS Document

4b. Edit owner's percentage of ownership

Click on the **E** button next to the owner's percentage of ownership you wish to change.
Enter the new percentage then click "Update".

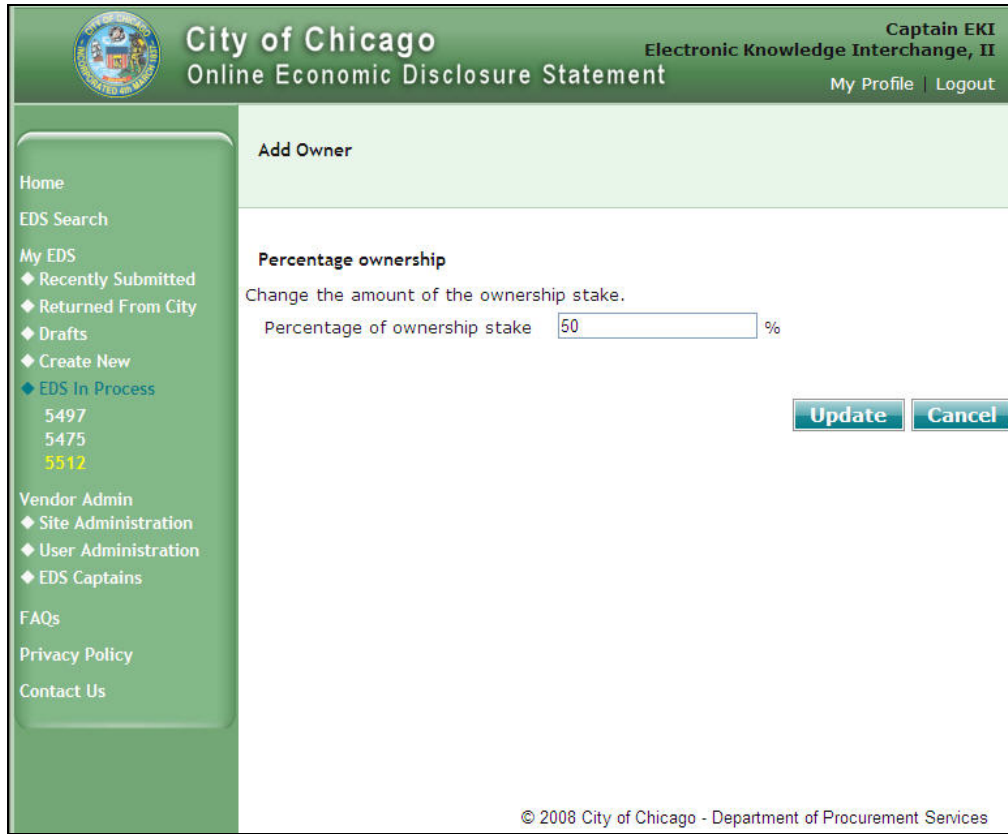


Figure 28 - Edit Ownership Percentage Screen

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

4c. Invite an owner

- Click on the **I** button to invite an owner to submit an EDS document to complete your EDS package.

NOTE: The Invite owner button is only available for owners that are legal entities. EDS documents are not required from individual owners regardless of percentage of ownership.

- Enter contact information for the owner then click "Invite Owner" button to send an invitation email or click "Cancel" to end the invitation process.

The screenshot shows the 'Add Owner' form in the City of Chicago's Online Economic Disclosure Statement system. The form is titled 'Add Owner' and is for 'EKI Owner LLC'. The contact information includes: Salutation (Miss), First Name (Karen), Middle Name, Last Name (EKI), Suffix, Email (edsmail99@yahoo.com), and Confirm Email address (edsmail99@yahoo.com). The message template is as follows:

Dear Miss Karen EKI,

I have recently submitted Economic Disclosure Statement #5512 to the City of Chicago as a representative of Electronic Knowledge Interchange, II.

As a representative of EKI Owner LLC - a direct or indirect owner of Electronic Knowledge Interchange, II - you are required by the City of Chicago to submit an Economic Disclosure Statement.

Please register yourself at the City of Chicago's Online EDS application at <http://webappsqa.cityofchicago.org/EDSWeb> and submit an Economic Disclosure Statement on behalf of EKI Owner LLC.

YOUR INVITATION NUMBER IS 2568.

If your invitation number doesn't work, please call me at 312-888-9999 or your City of Chicago contract administrator at 312-744-4900. You may also e-mail me at edsmail99@yahoo.com. Please DO NOT file an EDS without an invitation number. Doing so may render my EDS unapprovable by the City.

Please note that I and other representatives of Electronic Knowledge Interchange, II authorized to file EDSes will be able to view your EDS, just as we would if you were providing a paper EDS to us in connection with a City of Chicago matter.

Yours truly,
Captain EKI
Captain
Electronic Knowledge Interchange, II
Phone: 312-888-9999
E-mail: edsmail99@yahoo.com

At the bottom of the form, there are two buttons: 'Invite Owner' and 'Cancel'. The 'Invite Owner' button is highlighted in green.

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Figure 29 - Invite Owner Sample

TIP: After you have successfully issued an invitation, notice the **I** and **R** options are no longer available for the invited owner.

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

4d. Recertify an owner

If an owner has a current EDS document on file with the City within the last twelve (12) months, then the recertify option is available. You may recertify an owner rather than invite them to submit a new EDS document. You should only recertify an owner if you are certain that the owner's information is still true and correct.

- Click on **R** button to recertify an owner.

NOTE: If you are NOT certain if the owner's information is still true and correct then you should check with the owner or issue an invitation.

City of Chicago
Online Economic Disclosure Statement

Fiftheiki User
Electronic Knowledge Interchange, II
My Profile | Logout

My EDS ♦ EDS In Process #5512

Legend: + Add owner, - Remove owner, E Edit owner, I Invite this vendor, R Recertify this vendor

Fill out the EDS questions for this page.

General Information, Ownership Interests, Business Relation..., Retained Parties, Certifications, Fed Certifications, Acknowledgements

2. Ownership Information

Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.

1. Click on the plus button to add an owner, the minus button to remove an owner, and the "E" button to edit an owner.
2. Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the plus button next to its name.
3. When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the "I" button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an "I" button.

If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.

Electronic Knowledge Interchange, II

- EKI Owner Company (40.0%) + - E I **R**
- EKI Owner Second-Indiv (50.0%) - E
- EKI Owner Individual (30.0%) - E
- EKI Owner Removal (30.0%) - E

Previous Next Ready to Submit Save Cancel

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Figure 30 - Recertify Option Sample

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

- On the Recertify Owner screen, click on the “View the EDS document you are certifying to” link to view the owner’s EDS information.
- If the owner’s EDS information is true and correct, then click the checkbox to confirm your agreement to recertify the owner and then click the “Recertify” button.
- If the owner’s EDS information is not accurate then click on the “Cancel” button to return to the previous screen to issue an invitation.

The screenshot displays the 'Recertify Owner' interface. At the top, the City of Chicago logo and 'Online Economic Disclosure Statement' are visible, along with the user's name 'Fiftheke User' and 'Electronic Knowledge Interchange, II'. A navigation menu on the left includes links for Home, EDS Search, My EDS (Recently Submitted, Returned From City, Drafts, Create New, EDS In Process 5512), Vendor Admin (EDS Captains), FAQs, Privacy Policy, and Contact Us. The main content area features a table with the following data:

| | |
|----------------------------|-------------------|
| Owner: | EKI Owner Company |
| Last submitted EDS number: | 5572 |
| Last submitted EDS date: | 12/09/2008 |

Below the table, there is a blue link: [View the EDS document you are certifying to](#). A checkbox is present with the text: Under penalty of perjury, I certify that I have read the EDS of EKI Owner Company ("Owner") and certify as follows:

(1) ~~I am authorized to execute this EDS recertification on behalf of the Owner and~~

(2) All certifications and statements contained in the Owner's original EDS are true, accurate and complete as of the date furnished to the City and continue to be true, accurate and complete as of the date of this recertification.

If you are unable to certify for this owner, click "Cancel". Then click "I" to invite the owner to submit a new EDS. If a change to ownership is one of the reasons you are unable to certify, also click "E" next to the owner name to edit the ownership percentage. After entering the correct percentage, click "Update" to confirm the change.

At the bottom right, there are two buttons: 'Recertify' and 'Cancel'. The footer contains the text: © 2008 City of Chicago - Department of Procurement Services

Figure 31 - Recertify Owner Screen

Online Economic Disclosure Statement - Instruction Manual
Create New EDS Document

- After you have recertified an owner, the Invite **I** and Recertify **R** options are no longer available for the recertified owner.

The screenshot displays the City of Chicago Online Economic Disclosure Statement (EDS) interface. At the top, the user is identified as 'Fiftheiki User' with the role 'Electronic Knowledge Interchange, II'. The page title is 'City of Chicago Online Economic Disclosure Statement'. A legend indicates the following actions: '+' for 'Add owner', '-' for 'Remove owner', 'E' for 'Edit owner', 'I' for 'Invite this vendor', and 'R' for 'Recertify this vendor'. The user's current EDS is 'EDS In Process #5512'. The main content area is titled '2. Ownership Information' and includes a help icon. The instructions state: 'Please provide ownership information concerning each person or entity having a direct or indirect beneficial interest in excess of 7.5% of the Disclosing Party. Examples of such an interest include shares in a corporation, partnership interest in a partnership or joint venture, interest of a member or manager in a limited liability company, or interest of a beneficiary of a trust, estate, or other similar entity. Note: Pursuant to Section 2-154-030 of the Municipal code of Chicago, the City may require any such additional information from any applicant which is reasonably intended to achieve full disclosure.' The instructions are numbered 1 through 3. Below the instructions, a note states: 'If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.' The 'Electronic Knowledge Interchange, II' section lists four owners with their respective ownership percentages and actions: 'EKI Owner Company (40.0%)' with '+', '-', and 'E' buttons; 'EKI Owner Second-Indiv (50.0%)' with '-' and 'E' buttons; 'EKI Owner Individual (30.0%)' with '-' and 'E' buttons; and 'EKI Owner Removal (30.0%)' with '-' and 'E' buttons. At the bottom, there are buttons for 'Previous', 'Next', 'Ready to Submit', 'Save', and 'Cancel'. The footer indicates '© 2008 City of Chicago - Department of Procurement Services'.

Figure 32 – Post -Recertified Option Sample

Section 5. Review Errors and Warnings

When you submit your EDS document, the Online EDS system will automatically perform error and consistency checks, and display the errors or warnings on the screen.

- All **errors** must be corrected before you may submit your EDS document.
- It is **STRONGLY** recommended that you review the **warnings** and make any necessary corrections before you submit your EDS document.

The screenshot shows the City of Chicago Online Economic Disclosure Statement (EDS) interface. The header includes the City of Chicago logo, the title "City of Chicago Online Economic Disclosure Statement", and the user's role "Captain EKI Electronic Knowledge Interchange, II" with links for "My Profile" and "Logout".

The main content area is titled "My EDS ♦ Create New". Below this, there is a section "Ready to Submit ?" with a help icon. A message states: "Before you can submit your EDS to DPS, you must correct the following errors:"

| | Error Message | Section |
|--|------------------------------------------------|---------------------|
| | EKI Owner Company is not certified or invited. | Ownership Interests |
| | EKI LLC Tertiary is not certified or invited. | Ownership Interests |
| | "Description of Matter" is required. | General Information |
| | No controlling parties declared. | Ownership Interests |

Below the error table, a message states: "The following warning messages are designed to bring your attention to potential areas of your EDS that may be problematic. Please review the messages."

| | Warning Message | Section |
|--|-------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| | The value of (or a value of) "Nature of Disclosing Party" on record has changed. | Ownership Interests |
| | The ownership structure defined in this EDS differs from the ownership structure on record for Electronic Knowledge Interchange, II | Ownership Interests |

At the bottom right of the main content area, there is a button labeled "Return to EDS".

The footer of the page reads: "© 2008 City of Chicago - Department of Procurement Services".

Figure 33 - Sample Errors and Warning Messages



Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document


5a. Errors

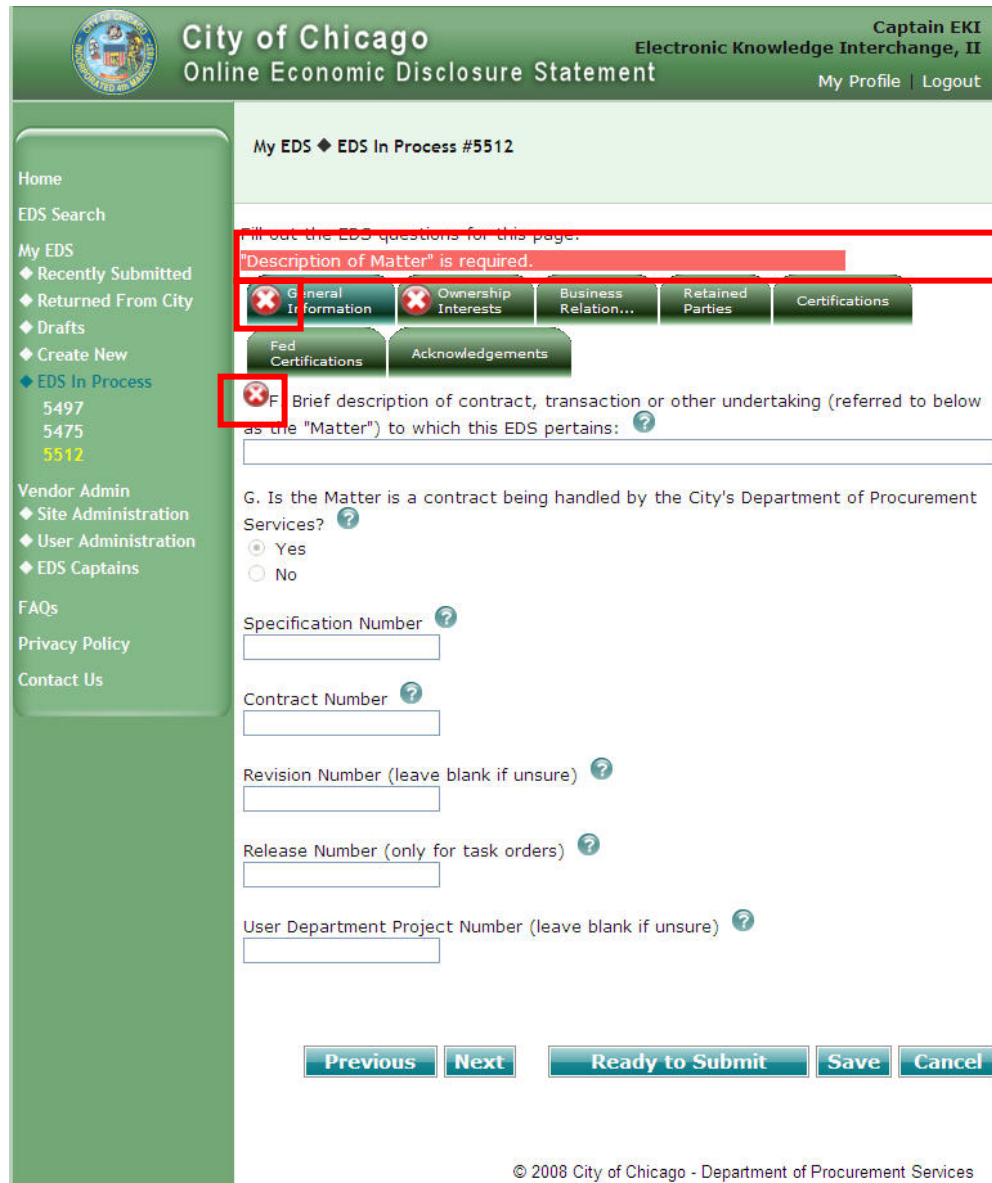
- To correct errors found during EDS submission, click the “Return to EDS” button on the Ready to Submit screen.

NOTE: All **errors** must be corrected before you may submit your EDS document.

- Click on the tab that is marked with . Click on “Next” until you encounter  next to the field that needs to be corrected.

NOTE: The error details are displayed in RED text above the tabs.

- Make the necessary correction and perform one of the following actions:
 - Click on “Next” to verify that you have addressed all errors and warnings in this section; or
NOTE: You may click “Save” at any time to save your changes and return for further revisions later.
 - If there are more errors, click on another tab marked with ; or
 - If there are no more errors or warnings to address, click “Ready to Submit”.



The screenshot displays the City of Chicago Online Economic Disclosure Statement (EDS) submission interface. The user is logged in as Captain EKI. The main heading is "City of Chicago Online Economic Disclosure Statement". The user's profile information is "Captain EKI Electronic Knowledge Interchange, II" with links for "My Profile" and "Logout".

The interface shows a sidebar with navigation options: Home, EDS Search, My EDS (Recently Submitted, Returned From City, Drafts, Create New, EDS In Process), Vendor Admin (Site Administration, User Administration, EDS Captains), FAQs, Privacy Policy, and Contact Us.

The main content area displays "My EDS ♦ EDS In Process #5512". Below this, a red box highlights the error message: "Fill out the EDS questions for this page. 'Description of Matter' is required." The "General Information" tab is marked with a red X icon, indicating an error. Other tabs include Ownership Interests, Business Relation..., Retained Parties, and Certifications. Below the tabs are buttons for "Fed Certifications" and "Acknowledgements".

The "General Information" section contains a red X icon next to the label "Brief description of contract, transaction or other undertaking (referred to below as the 'Matter') to which this EDS pertains:". Below this is a text input field. Further down, there is a question: "G. Is the Matter is a contract being handled by the City's Department of Procurement Services?" with radio buttons for "Yes" and "No". Below this are several text input fields for "Specification Number", "Contract Number", "Revision Number (leave blank if unsure)", "Release Number (only for task orders)", and "User Department Project Number (leave blank if unsure)".

At the bottom of the form are buttons for "Previous", "Next", "Ready to Submit", "Save", and "Cancel". The footer of the page reads "© 2008 City of Chicago - Department of Procurement Services".

Figure 34 – Error Sample



Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document


5b. Warnings

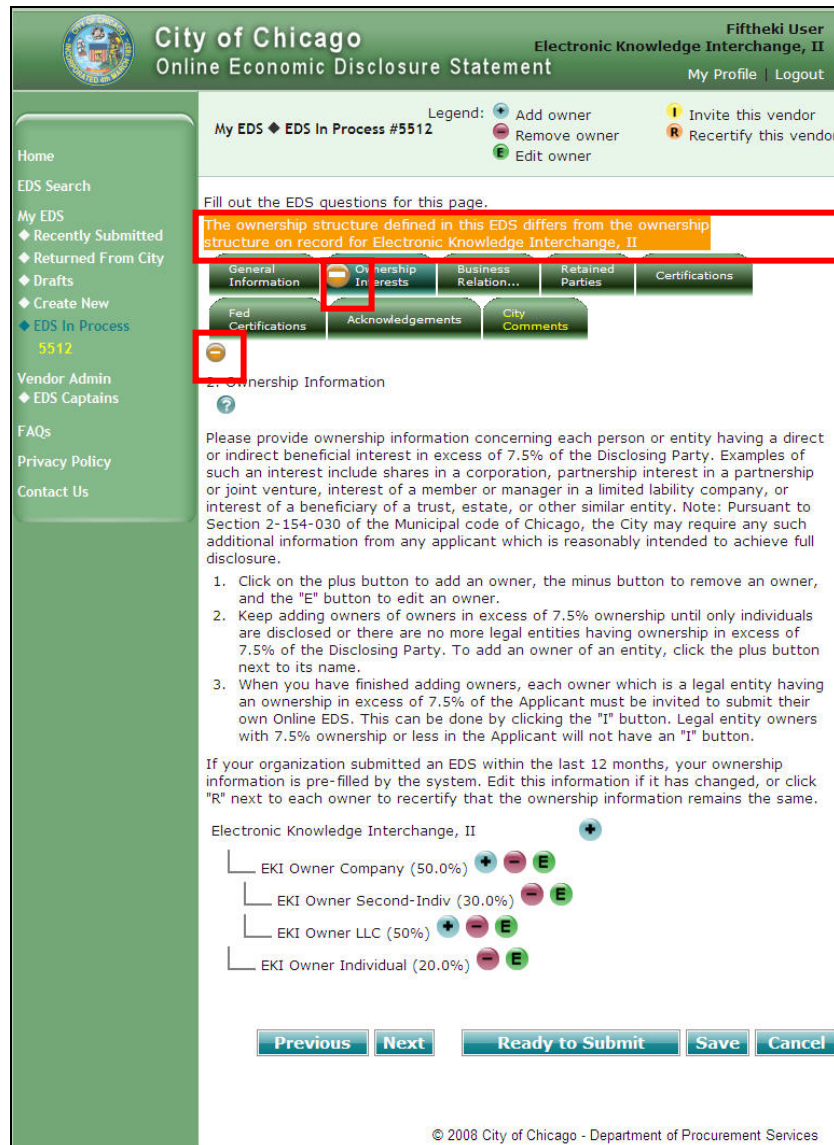
- To address warnings found during EDS submission, click the “Return to EDS” button on the Error and Warning screen.

NOTE: Warnings are informational, but it is **STRONGLY** recommended that you review the warnings and make any necessary corrections before you submit your EDS document.

- Click on the tab that contains warnings which is marked with , click on “Next” until you encounter the  next to the field or section that needs to be addressed.

NOTE: The warning details are displayed in orange text above the tabs.

- Address the warning messages as needed and perform one of the following actions:
 - Click on “Next” to verify that you have addressed all errors and warnings; or
 - **NOTE:** You may click “Save” at any time to save your changes and return for further revisions later.
 - If there are more warnings, click on another tab marked with ; or
 - If there aren’t any more errors or warnings to address, click “Ready to Submit”.



The screenshot displays the City of Chicago Online Economic Disclosure Statement (EDS) interface. The user is logged in as 'Fiftheiki User'. The main content area shows a warning message: "The ownership structure defined in this EDS differs from the ownership structure on record for Electronic Knowledge Interchange, II". This message is highlighted in orange. Below the warning, there are several tabs: "General Information", "Ownership Interests", "Business Relations...", "Retained Parties", and "Certifications". The "Ownership Interests" tab is selected and highlighted with a red box. Below the tabs, there is a section titled "2. Ownership Information" with a question mark icon. The text explains the requirements for ownership disclosure and provides instructions on how to add, remove, or edit owners. At the bottom, there is a list of ownership entries: "EKI Owner Company (50.0%)", "EKI Owner Second-Indiv (30.0%)", "EKI Owner LLC (50%)", and "EKI Owner Individual (20.0%)". Each entry has a plus, minus, and edit icon. At the bottom of the page, there are buttons for "Previous", "Next", "Ready to Submit", "Save", and "Cancel".

Figure 35 - Warning Sample

Section 6. Completion Steps

After all errors and warnings are resolved or addressed as appropriate, it is STRONGLY recommended that you review your EDS document prior to submission.

To view your EDS document prior to submission, perform the following steps:

- Click “Save”, then find your EDS document under “Drafts”.
- Click on the **V** button to view your EDS document in the PDF window.

If your EDS document needs revision, you may click on your EDS number under “EDS in Process”, or click on the **F** button of your EDS document on the “Drafts” screen.

- After you have completed your changes, then click on the “Ready to Submit” button.

If you are confident that your EDS document is in good order and is ready to for submission then:

- Close out of the PDF window, and return to your Online EDS screen.
 - Click on the “Ready to Submit” button.

6a. Electronic Signature

On the Ready to Submit screen, sign your EDS document electronically as follows:

- Enter the EDS password you used to log into the online EDS system.
- Provide the answer to the secret question you provided during registration.
- Click “Submit” to submit EDS document to the City or click “Return to EDS” to continue working on EDS document.

The screenshot shows the 'Ready to Submit' page of the City of Chicago's Online Economic Disclosure Statement system. The header includes the City of Chicago logo, the title 'City of Chicago Online Economic Disclosure Statement', and the user's name 'Fiftheiki User' with options for 'Electronic Knowledge Interchange, II', 'My Profile', and 'Logout'. The left sidebar contains a navigation menu with links to Home, EDS Search, My EDS (Recently Submitted, Returned From City, Drafts, Create New, EDS In Process 5512), Vendor Admin (EDS Captains), FAQs, Privacy Policy, and Contact Us. The main content area shows 'My EDS' with a 'Create New' link and a 'Ready to Submit' section with a green checkmark icon and the message 'Your EDS document appears to be in good order'. Below this is a legal disclaimer: 'Under penalty of perjury, the person signing below: (1) warrants that he/she is authorized to execute this EDS on behalf of the Disclosing Party, and (2) warrants that all certifications and statements contained in this EDS are true, accurate and complete as of the date furnished to the City. Submission of this form constitutes making the oath associated with notarization.' This is followed by instructions: 'If you need to correct any information before submitting, click "Return to EDS". Otherwise, providing the information below constitutes your electronic signature for this EDS. You must re-enter your password and answer the security question you provided during the registration process in order to electronically sign and submit this EDS.' There are two input fields: 'Password' and 'In what city were you born?'. At the bottom right are 'Submit' and 'Return to EDS' buttons. The footer contains the copyright notice: '© 2008 City of Chicago - Department of Procurement Services'.

Figure 36 - Electronic Signature Sample

6b. Print EDS Certificate

NOTE: If you are the applicant and you are submitting a contract EDS document, then you will see this screen.

If you are an owner or if you are submitting an annual EDS information update, then you will not see this screen.

- After you have submitted your EDS document to the City, you will need to click on the “View Certificate” button on the Print EDS Certificate screen.

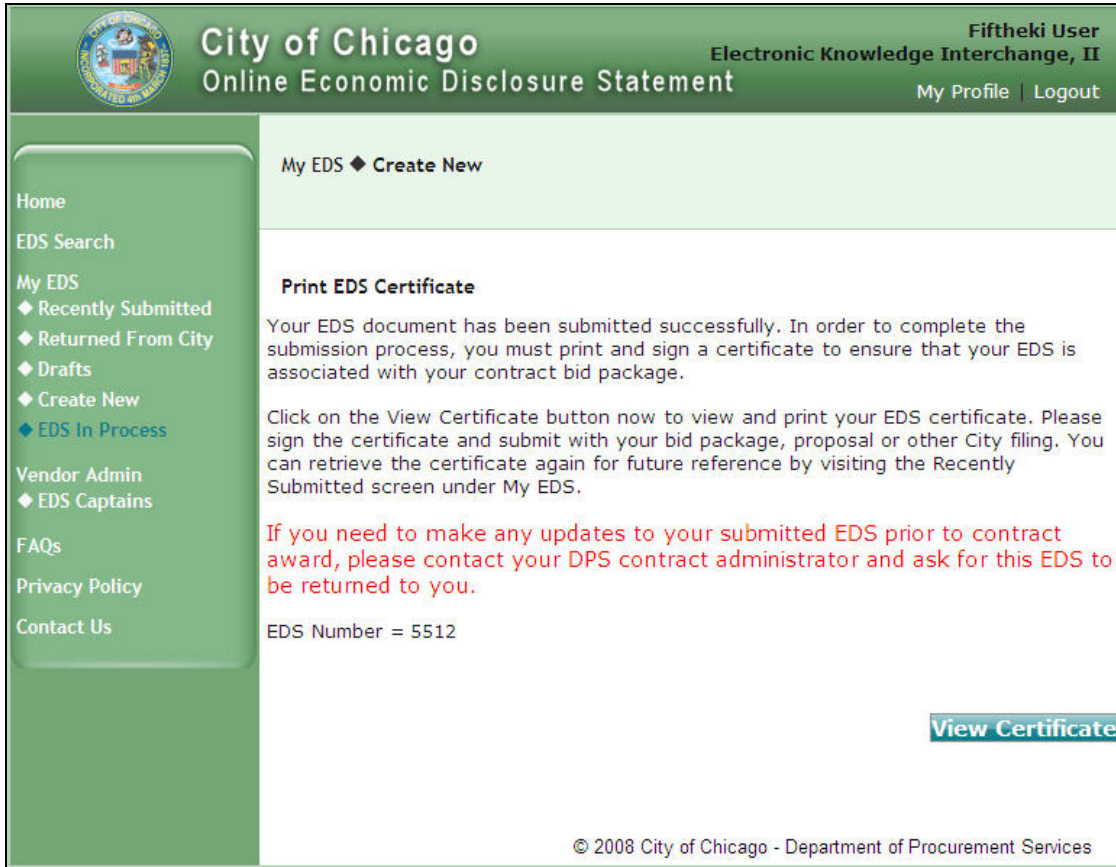


Figure 37 - Print EDS Certificate Screen

Online Economic Disclosure Statement - Instruction Manual

Create New EDS Document

- Print your Certificate of Filing from the PDF window.
- Sign the Certificate of Filing and include it in your bid or proposal package that you are providing to the City concerning the Matter.

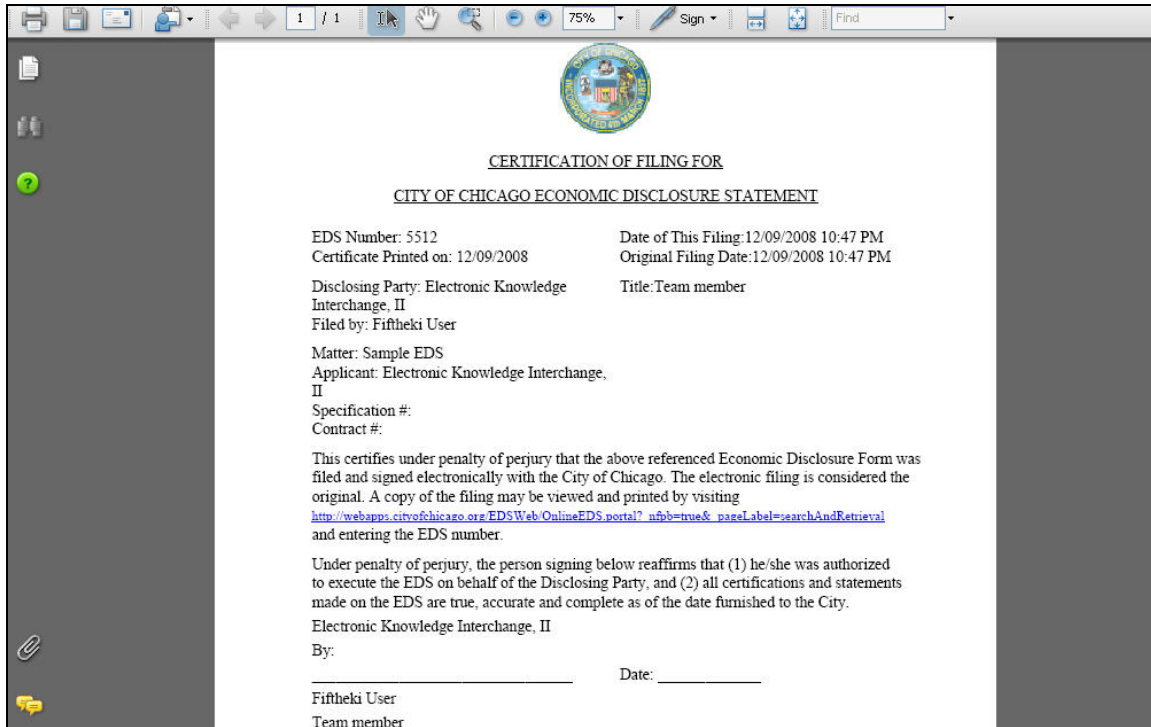


Figure 38 - Certification of Filing EDS Window