

How to Get Started with the PFS Filing Application

Page through this PDF file to see an example of:

- Logging into the PFS filing application**
- Starting a new report**
- Entering family members**
- Part 1A Sources of Occupational Income**



Welcome to the Texas Ethics Commission

ELECTRONIC FILING APPLICATION

Choose Your

FILING AUTHORITY



Who must file with the TEC: Filers who run for and/or hold statewide offices and multi-county offices that may include Governor, Lieutenant Governor, Attorney General, Comptroller, Railroad Commissioner, Land Commissioner, Agriculture Commissioner, State Chair of political party, Texas Senate, Texas House of Representatives, Multi-county District Attorney, State Board of Education, Supreme Court Justice, Court of Appeals Justice, Court of Criminal Appeals Judge, district judges, all Specific-Purpose PACs that support or oppose any of these candidate/officeholders or that support or oppose a measure submitted to the voters of the entire state and Specific-Purpose PACs created to support or oppose a measure on the issuance of bonds by a school district, all General-Purpose PACs, all political party County Executive Committees, all Legislative Caucuses, all candidates for Speaker of the Texas House of Representatives, all political parties that accept and/or maintain corporate contributions, and all persons filing Direct Campaign Expenditure reports, state officers and the state chair of each political party who file Personal Financial Statements, and state lobbyists.

Texas Ethics Commission

ELECTRONIC FILING APPLICATION

Texas Ethics Commission Filer Login

You must log in to proceed. Enter your login information below and press **Login**.

Filer ID: [Contact TEC for a TEC Filer ID](#)

Password: [Forgot Password?](#)

Select Filer Type: *

Select Filer Type

- COH - (COH) - Candidate/Officeholder (Non-judicial)
- SPAC - (SPAC) - Specific-Purpose Committee (Non-judicial)
- JCOH - (JCOH) - Judicial Candidate/Officeholder
- JSPC - (JSPC) - Judicial Specific-Purpose Committee
- GPAC - (GPAC) - General-Purpose Committee (Semiannual Filer)
- MPAC - (MPAC) - General-Purpose Committee (Monthly Filer)
- CEC - (CEC) - County Executive Committee (Semiannual Filer)
- MCEC - (MCEC) - County Executive Committee (Monthly Filer)
- LEG - (LEG) - Legislative Caucus
- PTYC - (PTYCORP) - Political Party Report Regarding Corporate/Labor Funds
- SCC - (SCC) - State/County Chair Candidate
- SCPC - (SCPC) - State/County Chair Specific-Purpose Committee
- DCE - (DCE) - Direct Campaign Expenditures
- ASIFSPAC - (ASIFSPAC) - AS-IF Specific-Purpose Committee (Non-judicial)
- SPK - (SPK) - Speaker of the House
- LOBB - (LOBB) - Lobbyist
- PFS - (PFS) - Personal Financial Statement/State Officer**

Texas Ethics Commission

ELECTRONIC FILING APPLICATION

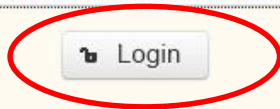
Texas Ethics Commission Filer Login

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Filer ID: [Contact TEC for a TEC Filer ID](#)

Password: [Forgot Password?](#)

Select Filer Type: *



TEXAS ETHICS COMMISSION

Verify the following information. Changes made here will immediately update your profile and will be included in future reports. After accepting this information, other profile updates may be made by selecting "Manage My Profile" on the next screen.

Filer Information

Name: Public, Pat

[Have a name change?](#)

Mailing Address:

Address 1: 123 Main Street

City, State, Zip Code, Country: My City TX 12345 United States

Phone Number: (555) 555-5555

Primary Email: nobody@does-not-exist.com

Accept

Update

Select "Update" if any of your profile data is incorrect.

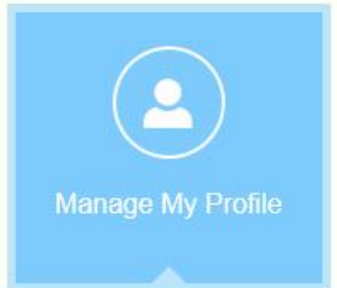
TEXAS ETHICS COMMISSION

What do you want to
DO TODAY?



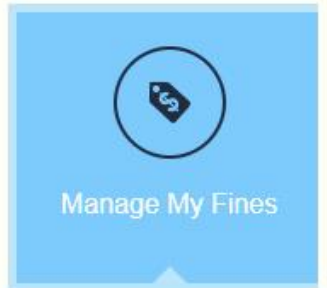
Manage My Reports

A blue square button with a white circular icon containing a document symbol. The text "Manage My Reports" is centered below the icon. The button is circled in red.



Manage My Profile

A blue square button with a white circular icon containing a person silhouette. The text "Manage My Profile" is centered below the icon.



Manage My Fines

A blue square button with a white circular icon containing a tag with a dollar sign. The text "Manage My Fines" is centered below the icon.

Messages [Public Notices](#)

No Messages

[View All...](#)

A white rectangular panel with rounded corners. It has two tabs: "Messages" (selected) and "Public Notices". Below the tabs is a horizontal line, followed by the text "No Messages" in bold. Another horizontal line is below that, and at the bottom is a link "View All..."

TEXAS ETHICS COMMISSION

Start a New Report [What is this?](#)

Filed Reports [What is this?](#)

Report <input type="text"/>	Report Type	Period Covered/Year <input type="text"/>	Filed Date	Action
100609029	• Personal Financial Statement	01/01/2014 - 12/31/2014	02/12/2016	Print Correct/Update

TEXAS ETHICS COMMISSION

Current Report: PFS

- Cover Sheet
- Logout

Cover Sheet


[Page Help](#)

Welcome: PFS Filer Public, Pat

Please select the calendar year (ending on December 31) covered by this PFS report.

NOTE: For most filers, a PFS report must include financial activity for the calendar year preceding the year in which the report is required to be filed. For example, if your PFS report is due in 2015, it will include the financial activity for calendar year 2014.

New Appointees: However, a new appointee's first personal financial statement covers the entire calendar year *preceding the year of appointment* rather than preceding the year the statement is due. See the Page Help for more details about the period covered.

Select Reporting Period 

- Select Reporting Period
- 01/01/2013 - 12/31/2013
- 01/01/2014 - 12/31/2014
- 01/01/2015 - 12/31/2015

City, State, Zip Code, Country: My City TX 12345 USA

This is my home Address * Yes No

Current Report: PFS

Cover Sheet

Logout

Cover Sheet

Welcome: PFS Filer Public, Pat

Please select the calendar year (ending on December 31) covered by this PFS report.

NOTE: For most filers, a PFS report must include financial activity for the calendar year preceding the year in which the report is required to be filed. For example, if your PFS report is due in 2015, it will include the financial activity for calendar year 2014.

New Appointees: However, a new appointee's first personal financial statement covers the entire calendar year preceding the year of appointment rather than preceding the year the statement is due. See the Page Help for more details about the period covered.

Great resource for help on each page!

Page Help

You already selected this



01/01/2015 - 12/31/2015

Please select your reason for filing :

You enter this



Candidate

You enter this



Indicate office *

State Senator

Address Info

Street: 123 Main Street

City, State, Zip Code, Country: My City TX 12345 USA

This is my home Address * Yes No

Select "Yes" or "No"



Start My Report

Cancel

TEXAS ETHICS COMMISSION

Current Report: PFS Covering 01/01/2015 - 12/31/2015

- ✦ Cover Sheet
- ✦ **Family Members**
- ✦ Walk Thru
- ✦ Worksheet Summary

Work With Parts

- Sources Of Occupational Income
- Retainers
- Stock
- Bonds/Notes/Commercial Paper
- Mutual Funds
- Interest/Dividends/Royalties/Rents
- Personal Notes/Lease Agreements
- Interests In Real Property
- Interests In Business Entities
- Gifts
- Trust Income
- Blind Trusts
- Trustee Statement
- Assets Of Business
- Liabilities Of Business
- Boards And Executive Positions

Walk Thru

These questions will help you determine which parts to complete. Most questions are related to you, your spouse, or your dependent children. The following apply only to you: 13, 15, 16, 17, and 18. For each "Yes" answer the applicable parts will be highlighted in green on the Worksheet Summary.

During the period covered was there:

1A Sources of Occupational Income?	<input type="radio"/>	Yes	<input type="radio"/>	No
1B Retainers?	<input type="radio"/>	Yes	<input type="radio"/>	No
2 Stock?	<input type="radio"/>	Yes	<input type="radio"/>	No
3 Bonds, Notes, and Other Commercial Paper?	<input type="radio"/>	Yes	<input type="radio"/>	No
4 Mutual Funds?	<input type="radio"/>	Yes	<input type="radio"/>	No
5 Income From Interest, Dividends, Royalties and Rents That Exceeds \$500?	<input type="radio"/>	Yes	<input type="radio"/>	No
6 Personal Notes and Lease Agreements That Exceed \$1000?	<input type="radio"/>	Yes	<input type="radio"/>	No
7A Interests In Real Property?	<input type="radio"/>	Yes	<input type="radio"/>	No
7B Interests in Business Entities?	<input type="radio"/>	Yes	<input type="radio"/>	No
8 Gifts That Exceed \$250?	<input type="radio"/>	Yes	<input type="radio"/>	No
9 Trust Income?	<input type="radio"/>	Yes	<input type="radio"/>	No

TEXAS ETHICS COMMISSION

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Current Report: PFS Covering 01/01/2015 - 12/31/2015

- Cover Sheet
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Work With Parts

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Family Members

(1 of 1) [Navigation icons] 5 [Dropdown]

Name	Relation	Action
------	----------	--------

No records found.

(1 of 1) [Navigation icons] 5 [Dropdown]

Add Done with Family Members

TEXAS ETHICS COMMISSION

Page Help

Current Report: PFS Covering 01/01/2015 - 12/31/2015

- Cover Sheet
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Work With Parts

- Sources Of Occupational Income
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Family Members

Spouse or Child ? * Dependent Child Spouse

Last Name *

First Name *

Title

Suffix

Nickname

Save and Add Another

- Save
- Save and Duplicate
- Delete

You enter these



TEXAS ETHICS COMMISSION

Home Profile

Family member has been added

Reports Fresh Fees Messages 2

Page Help

Current Report: PFS Covering 01/01/2015 - 12/31/2015

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Work With Parts

- Sources Of Occupational Income
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Family Members

(1 of 1) [Navigation icons] 1 [Page 5]

Name	Relation	Action
Paul Public	SPOUSE	[Edit] [Delete]

(1 of 1) [Navigation icons] 1 [Page 5]

Add **Done with Family Members**

TEXAS ETHICS COMMISSION

Current Report: PFS Covering 01/01/2015 - 12/31/2015

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Work With Parts

- Sources Of Occupational Income
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Worksheet Summary

[Page Help](#)

If you indicated on a previous screen that you have activity to report, those parts are highlighted in green below. Select any of the parts for which you have indicated you have information to report.

Part	Number of Entries	Action
1A Sources of Occupational Income	0	Start
1B Retainers	0	Start
2 Stock	0	Start
3 Bonds, Notes, and Other Commercial Paper	0	Start
4 Mutual Funds	0	Start
5 Income From Interest, Dividends, Royalties and Rents That Exceeds \$500	0	Start
6 Personal Notes and Lease Agreements That Exceed \$1000	0	Start
7A Interests In Real Property	0	Start
7B Interests in Business Entities	0	Start
8 Gifts That Exceed \$250	0	Start
9 Trust Income	0	Start
10A Blind Trusts	0	Start
10B Trustee Statement	0	Start
11A Assets of Business Associations	0	Start
11B Liabilities of Business Associations	0	Start

TEXAS ETHICS COMMISSION

Current Report: PFS Covering 01/01/2015 - 12/31/2015

- ✓ Cover Sheet
- ✓ Family Members
- ✓ Walk Thru
- ✓ Worksheet Summary

Work With Parts

- Sources Of Occupational Income
- Retainers
- Stock
- Bonds/Notes/Commercial Paper
- Mutual Funds
- Interest/Dividends/Royalties/Rents
- Personal Notes/Lease Agreements

Walk Thru

These questions will help you determine which parts to complete. Most questions are related to you, your spouse, or your dependent children. The following apply only to you: 13, 15, 16, 17, and 18. For each "Yes" answer the applicable parts will be highlighted in green on the Worksheet Summary.

During the period covered was there:

1A Sources of Occupational Income?	<input checked="" type="radio"/>	Yes	<input type="radio"/>	No
1B Retainers?	<input type="radio"/>	Yes	<input type="radio"/>	No
2 Stock?	<input type="radio"/>	Yes	<input type="radio"/>	No
3 Bonds, Notes, and Other Commercial Paper?	<input type="radio"/>	Yes	<input type="radio"/>	No
4 Mutual Funds?	<input type="radio"/>	Yes	<input type="radio"/>	No

Select "Yes"

16 Legislator Representing a Person Before a State Agency?	<input type="radio"/>	Yes	<input type="radio"/>	No
17 Benefits Derived From Functions Honoring Public Servant?	<input type="radio"/>	Yes	<input type="radio"/>	No
18 Legislator Who Applied For or Obtained a Legislative Continuance?	<input type="radio"/>	Yes	<input type="radio"/>	No

TEXAS ETHICS COMMISSION

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[Fines/Fees](#)
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**Current Report: PFS Covering
01/01/2015 - 12/31/2015**

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- ✦ [Walk Thru](#)
- ✦ [Worksheet Summary](#)

Work With Parts

- Sources Of Occupational Income
- Retainers
- Stock
- Bonds/Notes/Commercial Paper
- Mutual Funds
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- Personal Notes/Lease Agreements
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Worksheet Summary

[Page Help](#)

If you indicated on a previous screen that you have activity to report, those parts are highlighted in green below. Select any of the parts for which you have indicated you have information to report.

Part	Number of Entries	Action
1A Sources of Occupational Income	0	Start
1B Retainers	0	Start
2 Stock	0	Start
3 Bonds, Notes, and Other Commercial Paper	0	Start
4 Mutual Funds	0	Start
5 Income From Interest, Dividends, Royalties and Rents That Exceeds \$500	0	Start
6 Personal Notes and Lease Agreements That Exceed \$1000	0	Start
7A Interests In Real Property	0	Start
7B Interests in Business Entities	0	Start
8 Gifts That Exceed \$250	0	Start
9 Trust Income	0	Start
10A Blind Trusts	0	Start
10B Trustee Statement	0	Start
11A Assets of Business Associations	0	Start
11B Liabilities of Business Associations	0	Start

1A Sources of Occupational Income

- ↗ Cover Sheet
- ↗ Family Members
- ↗ Walk Thru
- ↗ Worksheet Summary

Work With Parts

- Sources Of Occupational Income
- Retainers
- Stock
- Bonds/Notes/Commercial Paper
- Mutual Funds
- Interest/Dividends/Royalties/Rents
- Personal Notes/Lease Agreements
- Interests In Real Property
- Interests In Business Entities
- Gifts
- Trust Income
- Blind Trusts
- Trustee Statement
- Assets Of Business
- Liabilities Of Business
- Boards And Executive Positions
- Honorarium Accepted
- Business Interest With Lobbyist
- Fees Received From Lobbyist
- Representation Before State Agency

To Whom does the information relate? * Public, Pat (SELF) Public, Paul (SPOUSE)

Note: This part is only applicable to one family member.

Self-employed

Name of employer: *

Position held: *

Address of employer

This is also the filer's home address

Address 1: *

Address 2:

City: *

Country: *

State: *

Zip Code: *

You enter these

You enter these

Save and Add Another

TEXAS ETHICS COMMISSION

Home Profile

Successfully saved
Reports Messages 2

Current Report: PFS Covering
01/01/2015 - 12/31/2015

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1A Sources of Occupational Income

Page Help

Here are your sources of Occupational Income, what would you like to do next?

Family Members	Employer ↕	Action
• Public, Pat(SELF)	Ideal Law Firm, LLC	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

(1 of 1) [Navigation icons] 5 [Dropdown]

- Add
- Memo
- Done with Occupational Income**

Build Number: V1.0.34942 (02/03/2016) Logged in as PFS Filer: Public, Pat (00049127) | [Logout](#)

TEXAS ETHICS COMMISSION

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**Current Report: PFS Covering
01/01/2015 - 12/31/2015**

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Work With Parts

- Sources Of Occupational Income
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- Mutual Funds
- Interest/Dividends/Royalties/Rents

1B Retainers [Page Help](#)

Please provide the following information about fees received as a retainer for a claim on future services.
To Whom does the information relate? * Pat Public (SELF) Paul Public (SPOUSE)

Note: This part is only applicable to one family member.

Retainer Received from Individual or Entity? * Individual Entity

Address of Individual or Entity Providing Retainer:

Address 1: *

Address 2:

City: *

Country: *

The PFS filing application will continue to walk you through all the parts, or you can click on “Walk Thru” to select the items you need to work on for this PFS report.