

## Revising Schedule B

To ensure that your Schedule B properly accounts for the disclosure of the specific types of financial interests that may be affected by your department's designated filers, you will need to review and possibly revise your Schedule B. To revise your Schedule B, please follow these steps:

### Step 1: Make a Copy of Your Current Schedule B

\_\_\_\_\_ This should be used as the official draft for documenting any proposed changes to your current Schedule B. Please be sure to write legibly on this copy and keep it clean, as it will become part of your department's file with the Ethics Commission and may be included in your transmission packet to City Council.

### Step 2: Cross-Check Your Revised Schedule A Against Your Current Schedule B

\_\_\_\_\_ Compare the designated positions on your revised Schedule A to the disclosure categories on the official draft of your current Schedule B. Make sure that there is a disclosure category that can be assigned to each designated position based on its decision-making responsibility.

**If you need to update any of your disclosure categories to include or exclude the reporting of certain financial interests due to an increase, decrease or substantive change in decision-making responsibility, please move on to Step 3.**

**If you do not need to update any of your existing disclosure categories, but do need to create new disclosure categories to solicit the disclosure of specific financial interests not already accounted for in your current Schedule B, please skip Step 3 and move on to Step 4.**

### Step 3: Update Existing Disclosure Categories

- \_\_\_\_\_ On your official draft of Schedule B, add any other financial interests that should be required to be reported under existing disclosure categories due to increased responsibilities.
- \_\_\_\_\_ Cross out financial interests that do not need to be reported under existing disclosure categories due to decreased responsibilities.
- \_\_\_\_\_ On your "Revised Disclosure Category Form" (found in the Forms/Templates tab of your COI Code Review Resource Manual), list the revisions (inclusions and exclusions) you have made to any of your disclosure categories and include a brief explanation for each revision.

### Step 4: Create New Disclosure Categories

- \_\_\_\_\_ Consider the types of personal financial interests that may be affected when an employee is making or participating in making governmental decisions.
- \_\_\_\_\_ To assist you in creating a new disclosure category, please refer to the "Sample Disclosure Categories" table in the Forms/Templates tab of your COI Code Review Resource Manual.
- \_\_\_\_\_ On your "New Disclosure Categories Form" (found in the Forms/Templates tab of your COI Code Review Resource Manual), list any new Disclosure Categories and briefly explain why each new category should be added to your Schedule B.

### Step 5: Prepare Revised Schedule B

\_\_\_\_\_ Follow the format of the "Schedule B Template" (found in the Forms/Templates tab of your COI Code Review Resource Manual) and draft a revised Schedule B that reflects all of the changes made on your official draft, on your "Revised Disclosure Category Form (s)" and on your "New Disclosure Categories Form(s)".

**Step 6: Assign Disclosure Categories to Designated Positions on Your Revised Schedule A**

- \_\_\_\_\_ Go back to your official copy of Schedule A and assign to each Designated Position a disclosure category from your Revised Schedule B. To determine a disclosure category for a designated position, you should consider the types of personal financial interests that may be affected when an employee is making or participating in making governmental decisions. Once these financial interests have been identified, the designated position should be assigned a disclosure category that requires the disclosure of those particular interests.
- \_\_\_\_\_ On the Disclosure Category column of your Revised Schedule A, identify the category that has been assigned to each position.