

1. Overview

In this tutorial, we will provide instructions on:

- How to create a new EDS document in the Online EDS system
- How to save your work on an EDS document to prevent data loss
- How to access various help resources
- How to provide ownership information
- How to review errors
- 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 a high-level process flow showing how an EDS document is created and submitted:

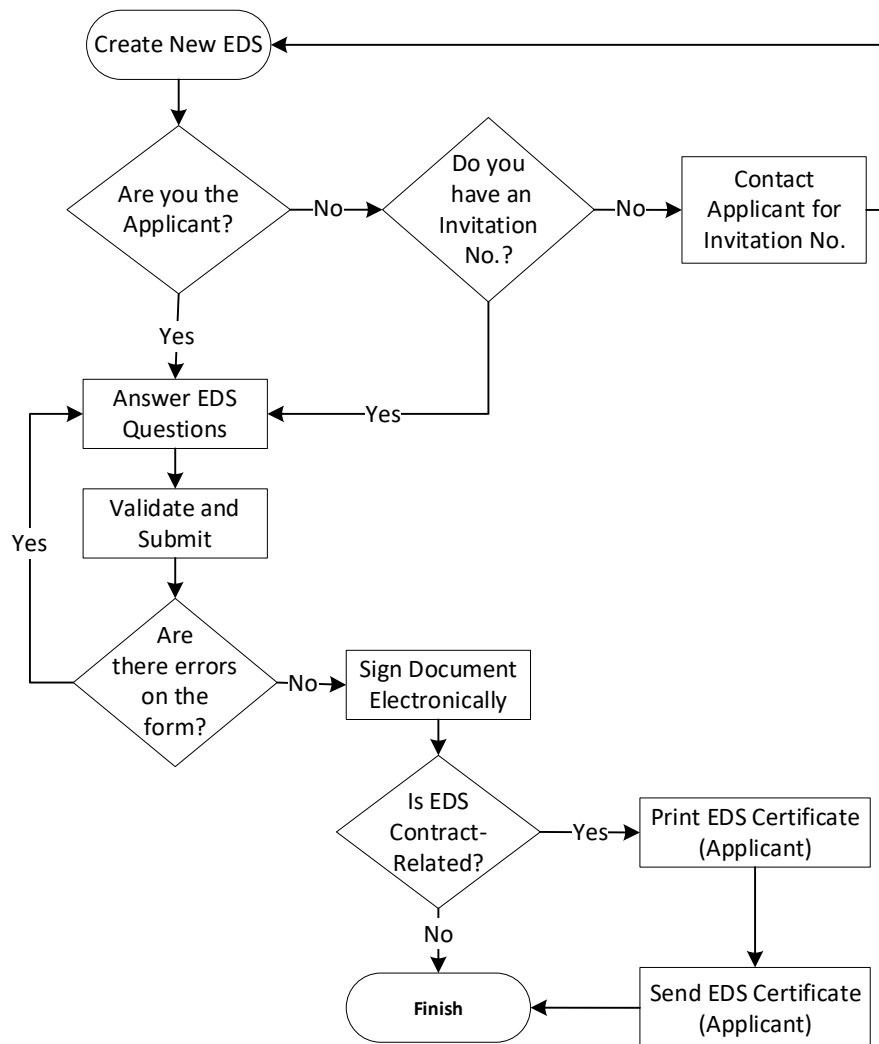


Figure 1: EDS Document Creation and Submission Process

2. Creating a New EDS document

a. To create a new EDS document, click on the "Create New" option from the My EDS menu

The screenshot shows the 'Create New EDS' page. At the top, there is a header with the 'ONLINE ECONOMIC DISCLOSURE STATEMENT' logo and the user's name 'Mr. William Jones' and company 'Best Group Engineering'. Below the header is a navigation bar with links: HOME, EDS SEARCH, MY EDS (with a dropdown arrow), COMPANY ADMIN (with a dropdown arrow), SUPPORT (with a dropdown arrow), MY PROFILE (with a user icon), and LOGOUT. The main content area is titled 'Create New EDS'. It contains instructions: 'Fill out the initial information to create an EDS document, then click the "Fill out EDS" button.' and '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'. The form includes several fields: 'Do you have an EDS invitation number?' with radio buttons for 'Yes' and 'No' (where 'No' is selected); 'Enter the EDS invitation number' with a text input field; 'Is this an EDS for a contract or an EDS information update?' with radio buttons for 'Contract (Select if certificate needed)' and '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.' with a dropdown menu showing '3254 W Maple Drive'; and 'Please select the contact person for this EDS.' with a dropdown menu showing 'Mr. William Jones'. At the bottom right, there are two buttons: 'Cancel' and 'Fill out EDS'.

Figure 2: Create New EDS Screen

b. Indicate whether this is a Contract-related EDS or an Information Update

- i. Select "Contract", if you are submitting an EDS document in connection with a bid, RFP, RFQ response, task order, sole source agreement, grant, or other City action, or an amendment, extension, or modification of an existing City contract
- ii. Select "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 received an email from the Online EDS system asking you to update your EDS information or your company information has changed

c. Enter your EDS Invitation number

- i. Applicable only to owners who received an invitation via email to submit an EDS document
- ii. The Invitation number can be found in an email sent to your company as a request to submit an EDS document
- iii. 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!

Online EDS 2.0 - Instruction Manual - Create New EDS Document

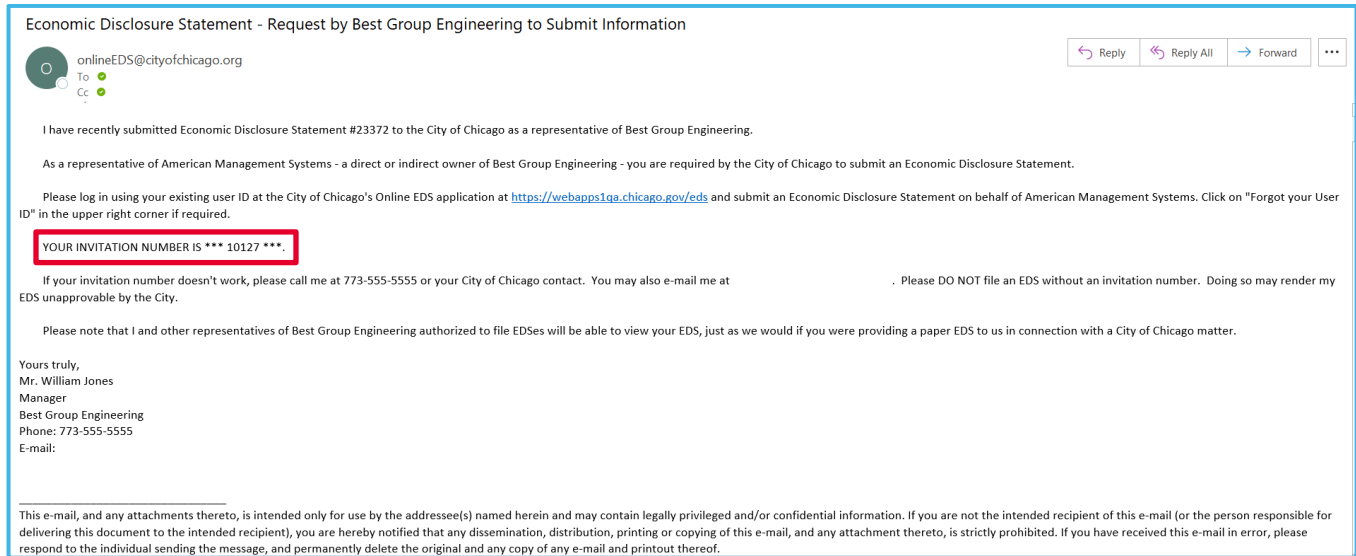


Figure 3: Invitation Email

d. Select a business address (Site) for this EDS

- i. Select a site that is specific to the EDS document that you are creating
- ii. You may ask the EDS Captain(s) within your company to add, delete, or change site information

e. Select a contact for this EDS

- i. Select a person within your company to be contacted via email, phone, etc. related to this EDS document
- ii. If contact person is not in the selection list, then that person needs to register and be approved for an Online EDS user account

f. Click "Fill Out EDS" button after you have completed data entry on the Create New EDS screen

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

3. Logistics

a. 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

- i. Click on the tabs on the left side of the screen to jump to a specific section of the EDS form at any time
- ii. Click on the numbered pages (steps) at the top of the screen to jump forward or backward within a section of the EDS form at any time
- iii. Click the “Previous” or “Next” buttons to navigate through the EDS form pages in sequence
- iv. 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
- v. Do not use the Back or Forward buttons in your web browser when using the Online EDS system

The screenshot displays the Online EDS 2.0 interface. On the left, a vertical sidebar contains a list of tabs: General Information, Ownership Interests (highlighted in blue), Income/Compensation, Retained Parties, Certifications, Fed Certifications, Acknowledgements, Appendix A, Appendix B, Appendix C, and Additional Info. At the top of the main content area, there are three page tabs: Page 1, Page 2, and Page 3, with Page 1 being the active page. The main content area is titled "SECTION II -- DISCLOSURE OF OWNERSHIP INTERESTS" and contains a section "A. NATURE OF THE DISCLOSING PARTY". Below this, there is a question "1. Indicate the nature of the Disclosing Party:" followed by a list of radio button options: Person or sole proprietor, Publicly registered business corporation, Privately held business corporation (selected), General partnership or joint venture, Limited partnership, Trust, Limited liability company, Limited liability partnership, Not-for-profit corporation, ESOP (Employee Stock Ownership Plan), Estate, and Other. Below the options is a question "Is the Disclosing Party incorporated or organized in the State of Illinois?" with radio button options Yes (selected) and No. At the bottom right of the interface, there is a row of buttons: Cancel, Previous, Next, Save, and Validate and Submit.

Figure 4: EDS Form Tabs, Pages (Steps) and Buttons

4. Incremental Saves

- a. Click "Save" at any time to save your work. Your EDS document will be saved in "Draft" status and can be found in the My EDS – Drafts table. Once you exit the EDS document, it may be retrieved for further revision either by you or another EDS user within your company
- b. Verify that the message "Successfully saved EDS document as draft" is displayed before continuing
- c. If you enter information in error and do not wish to save, click "Cancel" and then "Confirm" in the Cancel In Process EDS window, to confirm abandoning changes made since the last save.
- d. Save your work often

✓ Successfully saved EDS document as draft

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SECTION II -- DISCLOSURE OF OWNERSHIP INTERESTS

A. NATURE OF THE 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

Is the Disclosing Party incorporated or organized in the State of Illinois?

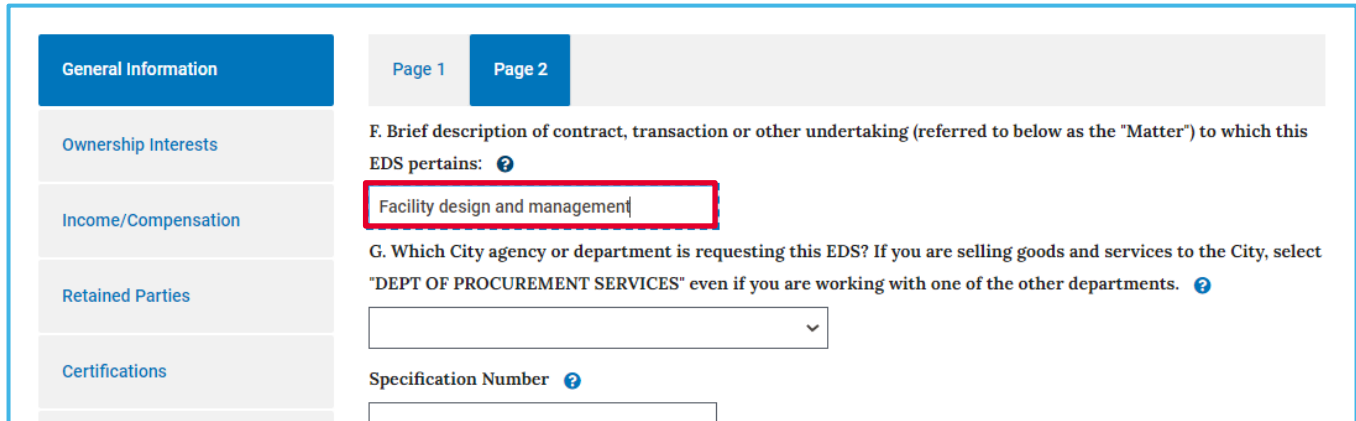
- ☒ Yes
- ☐ No

Figure 5: Successfully Saved as Draft Message

5. Answering Different Types of Questions

a. Standard Text Entry Fields

- i. Type your response to the question into the text entry field

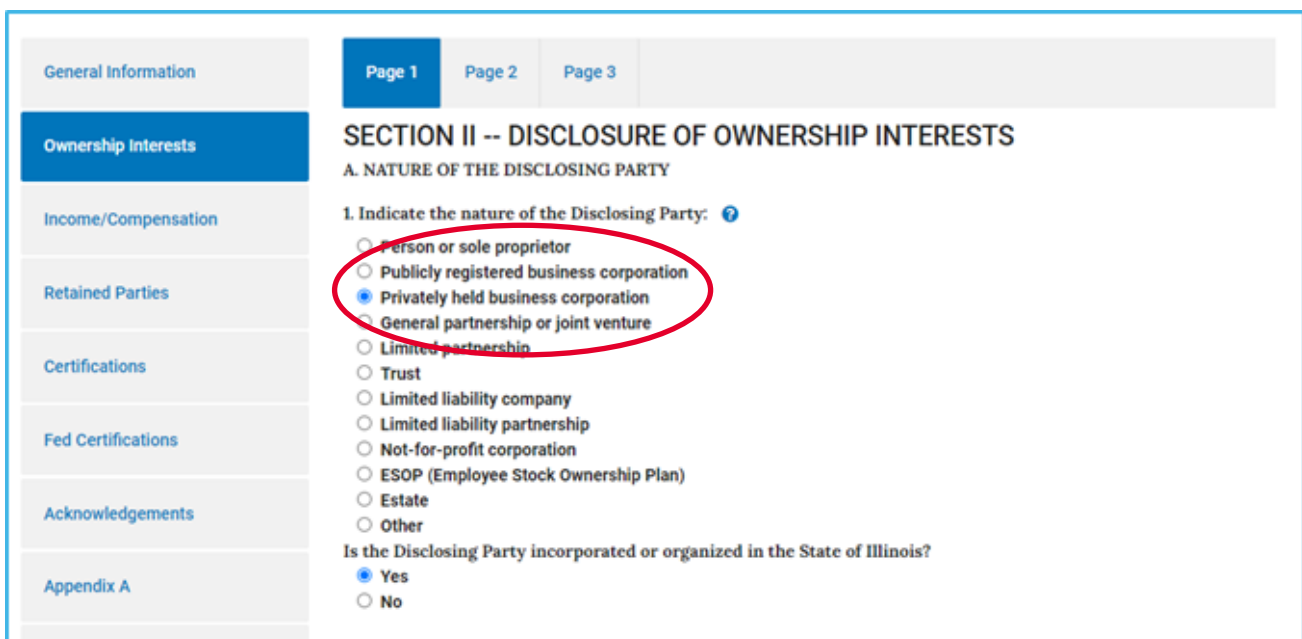


The screenshot shows the EDS 2.0 interface. On the left is a sidebar with 'General Information' selected. The main content area is on 'Page 2'. It contains a question: 'F. Brief description of contract, transaction or other undertaking (referred to below as the "Matter") to which this EDS pertains:'. Below the question is a text entry field containing the text 'Facility design and management'. Below the text field is another question: 'G. Which City agency or department is requesting this EDS? If you are selling goods and services to the City, select "DEPT OF PROCUREMENT SERVICES" even if you are working with one of the other departments.' followed by a dropdown menu. At the bottom, there is a 'Specification Number' field.

Figure 6: Standard Text Entry Field

b. Radio Buttons

- i. 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
- ii. Initially, upon entry to a screen, an answer may have been pre-selected. You may change the answer at any time



The screenshot shows the EDS 2.0 interface. On the left is a sidebar with 'Ownership Interests' selected. The main content area is on 'Page 1'. It has the title 'SECTION II -- DISCLOSURE OF OWNERSHIP INTERESTS' and a sub-section 'A. NATURE OF THE DISCLOSING PARTY'. Below this is a question: '1. Indicate the nature of the Disclosing Party:'. There are several radio button options: 'Person or sole proprietor', 'Publicly registered business corporation', 'Privately held business corporation' (which is selected and circled in red), 'General partnership or joint venture', 'Limited partnership', 'Trust', 'Limited liability company', 'Limited liability partnership', 'Not-for-profit corporation', 'ESOP (Employee Stock Ownership Plan)', 'Estate', and 'Other'. Below the radio buttons is another question: 'Is the Disclosing Party incorporated or organized in the State of Illinois?' with 'Yes' (selected) and 'No' options.

Figure 7: Radio Buttons

c. Dropdowns

- iii. Click on the arrow in the dropdown box for the dropdown list, and then click on the value that is the most appropriate
- iv. 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

The screenshot shows the 'General Information' tab on 'Page 2' of the EDS document. The left sidebar contains links for 'Ownership Interests', 'Income/Compensation', 'Retained Parties', 'Certifications', 'Fed Certifications', 'Acknowledgements', 'Appendix A', and 'Appendix B'. The main content area has two sections: 'F. Brief description of contract, transaction or other undertaking (referred to below as the "Matter") to which this EDS pertains:' with a text input field, and 'G. Which City agency or department is requesting this EDS? If you are selling goods and services to the City, select "DEPT OF PROCUREMENT SERVICES" even if you are working with one of the other departments.' with a dropdown menu. The dropdown menu is open, showing a list of city departments: BUSINESS AFFAIRS AND CONSUMER PROTECTION, DEPT OF CULTURAL AFFAIRS AND SPECIAL EVENTS, DEPT OF FAMILY AND SUPPORT SERVICES, DEPT OF FLEET AND FACILITY MANAGEMENT, DEPT OF HEALTH, DEPARTMENT OF HOUSING, DEPT OF PLANNING AND DEVELOPMENT, DEPT OF INNOVATION AND TECHNOLOGY, DEPT OF TRANSPORTATION, MAYOR'S OFFICE OF PEOPLE WITH DISABILITIES, OFFICE OF BUDGET MANAGEMENT, OFFICE OF THE CITY CLERK, and DEPT OF PROCUREMENT SERVICES. Below the dropdown is a text input field labeled 'Release Number (only for task orders)'.

Figure 8: Dropdown

d. Checkboxes

- i. 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

The screenshot shows a list of checkboxes under the heading 'Relationship'. The options are: Accountant, Attorney, Consultant, Dump Site, Lobbyist, Subcontractor - MWDBE, Subcontractor - non MWDBE, Supplier, and Other. The 'Attorney', 'Consultant', 'Subcontractor - non MWDBE', and 'Other' checkboxes are selected.

Figure 9: Checkbox

e. Grayed-Out Fields

- i. Grayed-out fields contain data that may not be changed during data entry
- ii. 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" from the My EDS menu, to start a new EDS document

- If your company name, site information, or contact name is incorrect, then contact your EDS Captain to correct

The screenshot shows the 'General Information' section of the Online EDS 2.0 interface. The left sidebar lists various sections, with 'General Information' selected. The main content area shows 'SECTION I -- GENERAL INFORMATION' with fields for legal name, address, and contact information. Some fields are grayed out, indicating they are not editable.

General Information

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SECTION I -- GENERAL INFORMATION

A. Legal name of the 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. ?

Best Group Engineering

Enter d/b/a if applicable: ?

The Disclosing Party submitting this EDS is: ?

☒ the Applicant

☐ a legal entity currently holding an interest in the Applicant

☐ a legal entity anticipated to hold an interest in the Applicant

☐ a legal entity with a right of control of the Applicant

B. Business address of the Disclosing Party: ?

Address Line 1

3254 W Maple Drive

Address Line 2

Suite 3501

Address Line 3

City

Chicago

Country

Figure 10: Grayed-Out Fields

f. Complex Response Rows

i. Adding information using a Complex Response Row

- For an answer that may require multiple pieces of information, a data entry screen will open to allow you to enter multiple pieces of information
- As an example, on the Retained Parties information screen, for each retained party you are adding, a Complex Response Row is displayed for you to enter answers pertaining to each retained party
- Click the button labeled "Add Complex Row" to open the entry screen

The screenshot shows the 'Retained Parties' section of the Online EDS 2.0 interface. The left sidebar lists various sections, with 'Retained Parties' selected. The main content area shows 'SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES' with a list of retained parties and a table for entering information. A 'Add Complex Row' button is visible at the bottom right.

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SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES

The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist (as defined in MCC Chapter 2-156), 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.

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 or does it anticipate retaining 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" or "hourly rate".

Add Complex Row

Figure 11: Complex Response Row - Screen 1

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- In the data entry screen, enter information in the fields, then click "Confirm" to save the information, or click "Cancel" to cancel the changes
- After you click "Confirm," the new set of answers will be displayed

State/Province
IL

Zip Code/Postal Code
60645

Relationship
☒ Accountant
☒ Attorney
☒ Consultant
☐ Dump Site
☐ Lobbyist
☐ Subcontractor - MWDDBE
☐ Subcontractor - non MWDDBE
☐ Supplier
☐ Other

Fees (\$\$ or %)
25%

Estimated/Paid
Estimated

Cancel Confirm

Figure 12: Complex Response Row - Screen 2

- To add additional information, click the "Add Complex Row" button to open another entry screen

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SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES

The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist (as defined in [MCC Chapter 2-156](#)), 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.

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 or does it anticipate retaining 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" or "hourly rate".

Add Complex Row

Name	Anticipated/Retained	Business Address	Relationship	Fees (\$\$ or %)	Estimated/Paid	Actions
		2578 W Fullerton Ave	Accountant			Edit

Figure 13: Complex Response Row - Screen 3

ii. Editing information entered using a Complex Response Row

- Click the "Edit" button next to the response that you wish to change

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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 or does it anticipate retaining 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" or "hourly rate".

[Add Complex Row](#)

Name	Anticipated/Retained	Business Address	Relationship	Fees (\$\$ or %)	Estimated/Paid	Actions
William Sheffield	Retained	2578 W Fullerton Ave Suite 3555 Chicago, IL 60645 United States	Accountant Attorney Consultant	25%	Estimated	Edit Remove

[Cancel](#) [Previous](#) [Next](#) [Save](#) [Validate and Submit](#)

Figure 14: Edit Complex Response Row - Screen 1

- Change information as needed in the data entry screen and click "Confirm"

Add Complex Response Row

Fill out the fields for the new row.

Name
Brian Sheffield

Anticipated/Retained
☐ Anticipated
☒ Retained

Business Address

Address Line 1
4678 W Fullerton Ave

Address Line 2
Suite 3201

Address Line 3

City
Chicago

Country
United States

State/Province
IL

Zip Code/Postal Code
60645

Figure 15: Edit Complex Response Row - Screen 2

- Verify that the information displayed in the response row has been updated

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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 or does it anticipate retaining 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" or "hourly rate".

[Add Complex Row](#)

Name	Anticipated/Retained	Business Address	Relationship	Fees (\$\$ or %)	Estimated/Paid	Actions
Brian Sheffield	Retained	4678 W Fullerton Ave Suite 3201 Chicago, IL 60645 United States	Accountant	25%	Estimated	Edit Remove

[Cancel](#) [Previous](#) [Next](#) [Save](#) [Validate and Submit](#)

Figure 16: Edit Complex Response Row - Screen 3

iii. Removing information entered using a Complex Response Row

- Click the "Remove" button next to the response you would like to remove

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The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist (as defined in MCC Chapter 2-156), 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.

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 or does it anticipate retaining 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" or "hourly rate".

[Add Complex Row](#)

Name	Anticipated/Retained	Business Address	Relationship	Fees (\$\$ or %)	Estimated/Paid	Actions
Brian Sheffield	Retained	4678 W Fullerton Ave Suite 3201 Chicago, IL 60645 United States	Accountant	25%	Estimated	Edit Remove

[Cancel](#) [Previous](#) [Next](#) [Save](#) [Validate and Submit](#)

Figure 17: Remove Complex Response Row - Screen 1

- Verify that the information was removed

The screenshot displays the 'Retained Parties' section of the Online EDS 2.0 interface. The sidebar on the left contains the following navigation links: General Information, Ownership Interests, Income/Compensation, Retained Parties (highlighted), Certifications, Fed Certifications, Acknowledgements, Appendix A, Appendix B, Appendix C, and Additional Info. The main content area is titled 'SECTION IV -- DISCLOSURE OF SUBCONTRACTORS AND OTHER RETAINED PARTIES' and includes the following text:

The Disclosing Party must disclose the name and business address of each subcontractor, attorney, lobbyist (as defined in MCC Chapter 2-156), 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.

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 or does it anticipate retaining 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' or 'hourly rate'.

[Add Complex Row](#)

At the bottom of the interface, there are five buttons: Cancel, Previous, Next, Save, and Validate and Submit.

Figure 18: Remove Complex Response Row - Screen 2

6. Help and Additional Information

g. Context-Sensitive Help and Additional Information

- i. Click on "?" icons to view additional information
- ii. Click on blue highlighted text, like **Affiliated Entity** in the example shown below, to view additional information in a new screen

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4. The Disclosing Party understands and shall comply with the applicable requirements of MCC Chapter 2-56 (Inspector General) and Chapter 2-156 (Governmental Ethics).

☒ I certify the above to be true

☐ I am unable to certify the above to be true

5. Neither the Disclosing Party, nor any Contractor, nor any **Affiliated Entity** of either the Disclosing Party or any Contractor, nor any Agents have, during the 5 years before the date of this EDS, or, with respect to a Contractor, an **Affiliated Entity**, or an **Affiliated Entity** of a Contractor during the 5 years before the date of such Contractor's or **Affiliated Entity's** contract or engagement in connection with the Matter:

a. 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;

b. 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

c. made an admission of such conduct described in subparagraph (a) or (b) above that is a matter of record, but have not been prosecuted for such conduct; or

d. violated the provisions referenced in MCC Subsection 2-92-320(a)(4)(Contracts Requiring a Base Wage); (a)(5) (Debarment Regulations); or (a)(6)(Minimum Wage Ordinance).

☒ I certify the above to be true

☐ I am unable to certify the above to be true

Figure 19: Context-Sensitive Help and Additional Information

h. Online EDS Manuals and Online EDS Videos are available from the Support menu

i. If you need additional assistance:

- a. For assistance with technical issues or using the Online EDS system, contact the EDS Help Desk at 312-744-HELP, or customersupport@cityofchicago.org Mondays-Friday, 8:30 a.m. – 4:30 p.m., excluding City holidays.
- b. For questions related to your specific matter, you may reach out to your City contact person. City staff cannot provide legal advice.

7. Ownership Interests

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

- i. You must indicate the type of legal entity (such as publicly held, or privately held, etc.), and specify the following information:
 - Officers and Directors
 - Controlling Interests
 - Titleholders
 - Ownership Information
- ii. Some concepts related to ownership information are:
 - Applicant refers to the prime vendor seeking a contract with the City
 - Parent refers to legal entity (not individual) 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
 - ✓ Re-certifications are normally done by companies that 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
 - Ownership tree refers to the diagram of an applicant's ownership structure

b. Adding an Owner

- i. On the Ownership Information screen, click on the "Add owner" button to add an owner
 - Click on the "Add owner" button next to the **applicant** to add a **parent**. A parent displays with one level of indentation under the applicant
 - Click on the "Add owner" button next to the **parent** to add a **grandparent**. A grandparent displays with one level of indentation under a parent, or two levels of indentation under the applicant

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2. Ownership Information

Please provide ownership information concerning each person or entity that holds, or is anticipated to hold (see next paragraph), a direct or indirect beneficial interest in excess of 7.5% of the Applicant. 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: Each legal entity below may be required to submit an EDS on its own behalf.

Please disclose present owners below. Please disclose anticipated owners in an attachment submitted through the "Additional Info" tab. "Anticipated owner" means an individual or entity in existence at the time application for City action is made, which is not an applicant or owner at such time, but which the applicant expects to assume a legal status, within six months of the time the City action occurs, that would render such individual or entity an applicant or owner if they had held such legal status at the time application was made.

- Click on the Add Owner button to add an owner, the Remove Owner button to remove an owner, and the Edit Owner 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 Add Owner 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.

To send your invitations, you must successfully submit your EDS to the City.
Invitations will be held until the EDS is submitted.

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.

Add owner
 Remove owner
 Edit owner
 Invite owner
 Recertify owner

Applicant	<div> <div>Best Group Engineering</div> <div>Mr. Richard Best - (25.0%)</div> </div>	
Parent	<div> <div>American Management Systems - (65.0%)</div> </div>	
Grandparent	<div> <div>Bay Group - (85.0%)</div> </div>	

Figure 20: Sample Ownership Information Screen

ii. On the next Add Owner screen, specify whether the owner is an Individual or a Legal Entity

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Mr. William Jones
 Best Group Engineering

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Select Vendor Type

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

☐ Individual
 ☒ Legal Entity

Figure 21: Add Owner Screen 1

- If you specify a Legal Entity as an owner, then on the next Add Owner screen, perform one of the following steps and then click "Next"
 - ❖ If you know the vendor owner's tax ID number (FEIN or SSN) then select Yes and enter the FEIN or SSN
 - ❖ Otherwise, enter the most unique part of the vendor owner's name. Enter a key word or partial word that is unique to the company name. The system will try to find the company information in our records. Below are TIPS to find the most complete list of likely matches:
 - One or partial word provides the best search results
 - Enter a fragment or a key word that is unique to the 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"

Figure 22: Add Owner Screen 2

- 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 portion of the Vendor Name matches that of the owner company
 - Click on the radio button next to the owner's name
 - ❖ Scenario 2 – One or more matches are found, but the owner is not listed
 - Click on the radio button next to "Add my information as a new vendor"
 - Enter owner's information in the appropriate fields
 - ❖ Scenario 3 – NO match is found
 - The radio 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 add process

Add Vendor Owner

Please select one of the following options.

	Vendor Name	Vendor # / FEIN or SSN	Vendor ID	Address
1	<input checked="" type="radio"/> Duvall Group	1064582 / xx-xxx5174	226010	<input checked="" type="radio"/> 6565 W Devon Ave, Suite 2500 Chicago, IL, 60645 United States

* - Required Field

☐ Add my information as a new vendor.

FEIN/SSN *

(Must be formatted as 00-0000000 for FEIN or 000-00-0000 for SSN)

Company Legal Name *

Duvall Group

Business Address Line 1 *

Business Address Line 2

Business Address Line 3

City *

Country *


State/Province *

Zip Code/Postal Code *

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

Figure 23: Add Owner Screen 3

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

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Mr. William Jones
Best Group Engineering

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Percentage Ownership

Finally, for existing or new vendors, enter the amount of the ownership stake including direct and indirect beneficial interests.

Percentage of ownership stake *

85

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

Figure 24: Add Owner Screen 4

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

ONLINE ECONOMIC DISCLOSURE STATEMENT

Mr. William Jones
Best Group Engineering

HOME EDS SEARCH MY EDS COMPANY ADMIN SUPPORT MY PROFILE LOGOUT

Review Owner Information

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

Company Legal Name: Duvall Group

Business Address: 6565 W Devon Ave, Suite 2500
Chicago, IL, 60645
United States

FEIN/SSN: xx-xxx5174

Percent owned: 85

Previous Confirm Cancel

Figure 25: Add Owner Screen 5

- v. After you have successfully added an owner, you will return to the Ownership Information screen, which will display the new owner in the Ownership tree

+ Add owner - Remove owner Edit owner i Invite owner ® Recertify owner

> Best Group Engineering

Mr. Richard Best - (25.0%)

> American Management Systems - (65.0%)

> Bay Group - (85.0%)

> Duvall Group - (85.0%)

Cancel Previous Next Save Validate and Submit

Figure 26: Owner Added to Ownership Tree

c. Removing an Owner

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

- If you remove an owner that has its own owners, then those owners will be removed as well
- Example: If you remove the "American Management Systems" vendor, then both the vendor and its owner, "Bay Group" will be removed

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1. Click on the Add Owner button to add an owner, the Remove Owner button to remove an owner, and the Edit Owner 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 Add Owner 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.

To send your invitations, you must successfully submit your EDS to the City.
Invitations will be held until the EDS is submitted.

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.

+ Add owner - Remove owner Edit owner i Invite owner R Recertify owner

> Best Group Engineering	
Mr. Richard Best - (25.0%)	
> American Management Systems - (65.0%)	+ - i R
> Bay Group - (85.0%)	+ - i R

Cancel Previous Next Save Validate and Submit

Figure 27: Removing an Owner

- After you click on the "Remove owner" button, a Confirmation window will appear. Click "Confirm" to proceed with removal, or "Cancel" to decline removal

Invitations will be held until the EDS is submitted.

Confirmation

Are you sure that you would like to remove this owner and all of its owners?

Cancel Confirm

+ Add owner - Remove owner Edit owner i Invite owner R Recertify owner

> Best Group Engineering	
Mr. Richard Best - (25.0%)	
> American Management Systems - (65.0%)	+ - i R

Figure 28: Confirmation Window for Owner Removal

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

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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.

Add owner **Remove owner** **Edit owner** **Invite owner** **Recertify owner**

Best Group Engineering

Mr. Richard Best - (25.0%)

Cancel **Previous** **Next** **Save** **Validate and Submit**

Figure 29: Ownership Branch Removed

d. Edit Owner's Percentage of Ownership

- i. Click on the "Edit owner" button next to the owner's percentage you would like to update
- ii. Enter the new percentage and click "Confirm"

ONLINE ECONOMIC DISCLOSURE STATEMENT

Mr. William Jones
Best Group Engineering

HOME **EDS SEARCH** **MY EDS** **COMPANY ADMIN** **SUPPORT** **MY PROFILE** **LOGOUT**

Percentage Ownership

Change the amount of the ownership stake.

Percentage of ownership stake *

37.5

Confirm **Cancel**

Figure 30: Edit Ownership Percentage Screen

e. Inviting an Owner

- i. Click on the "Invite owner" button to invite an owner to submit an EDS document to help complete your EDS package
 - 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 and then click "Confirm" to send an invitation email or click "Cancel" to end the invitation process

Invite owner

Vendor Name: Midway Engineering

Salutation: Mr. Title: Managing Partner First Name: Louis Middle Name: Last Name: Reed Suffix: Email Address: asoto@eki-consulting.com Confirm Email Address: asoto@eki-consulting.com

Message

Dear Mr. Louis Reed,

I have recently submitted Economic Disclosure Statement #23415 to the City of Chicago as a representative of Best Group Engineering.

As a representative of Midway Engineering - a direct or indirect owner of Best Group Engineering - 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 <https://webapps1qa.chicago.gov/eds> and submit an Economic Disclosure Statement on behalf of Midway Engineering.

YOUR INVITATION NUMBER IS *** 10169 ***.

If your invitation number doesn't work, please call me at 773-555-5555 or your City of Chicago contact. You may also e-mail me at smansuri@eki-consulting.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 Best Group Engineering 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,
Mr. William Jones
Manager
Best Group Engineering
Phone: 773-555-5555
E-mail: smansuri@eki-consulting.com

Cancel Confirm

Figure 31: Inviting an Owner

- After an invitation has been successfully issued, note that the "Invite owner" and "Recertify owner" options are no longer available for the invited owner

f. Recertify an Owner

- i. If an owner has a current EDS document on file with the City within the last (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 authorized to do so and are certain that the owner's information is still true and correct
- ii. Click on the "Recertify owner" button to recertify an owner
 - 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

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2. Ownership Information ?

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To send your invitations, you must successfully submit your EDS to the City.
Invitations will be held until the EDS is submitted.

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.

+ Add owner- Remove ownerEdit owneri Invite owner® Recertify owner

> Best Group Engineering

Mr. Richard Best - (25.0%)

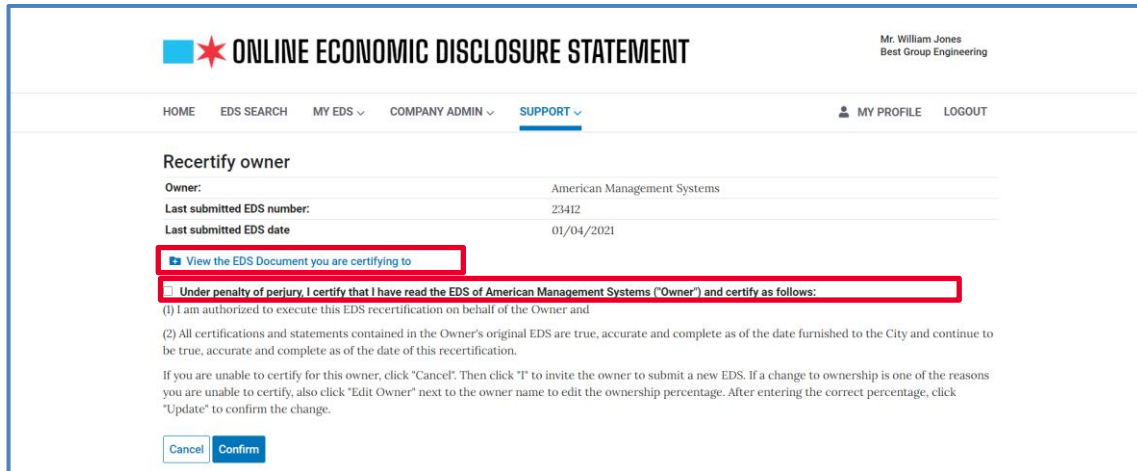
> American Management Systems - (65.0%)

> Bay Group - (85.0%)

CancelPreviousNextSaveValidate and Submit

Figure 32: Recertify Option

- 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 "Confirm" 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 shows the 'Recertify owner' screen in the Online Economic Disclosure Statement (EDS) system. At the top, the header includes the 'ONLINE ECONOMIC DISCLOSURE STATEMENT' logo and the user's name, 'Mr. William Jones, Best Group Engineering'. The navigation bar contains links for HOME, EDS SEARCH, MY EDS, COMPANY ADMIN, SUPPORT, MY PROFILE, and LOGOUT. The main content area is titled 'Recertify owner' and displays the following information:

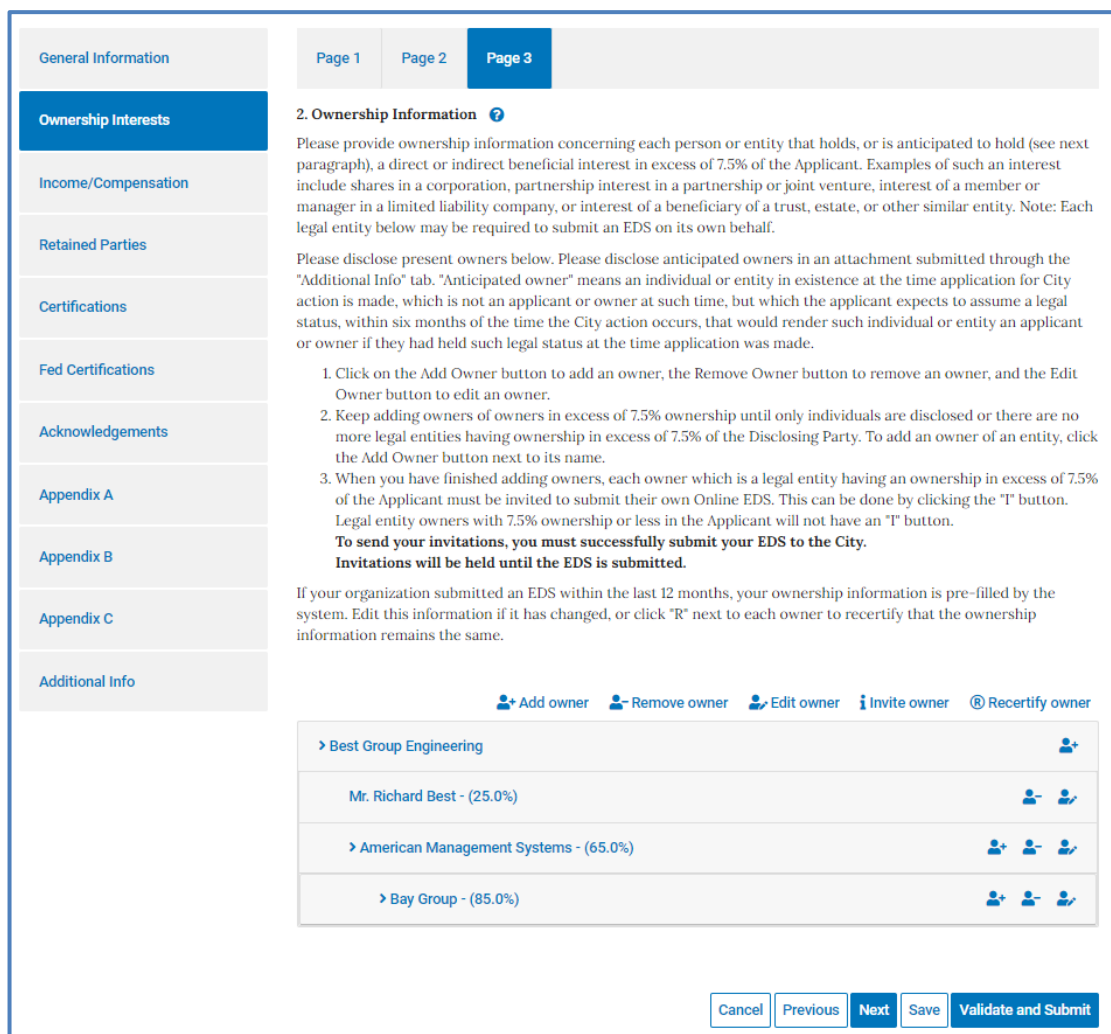
- Owner: American Management Systems
- Last submitted EDS number: 23412
- Last submitted EDS date: 01/04/2021

Below this information, there is a red-bordered box containing the text: 'View the EDS Document you are certifying to'. Below this box is a red-bordered box containing the text: 'Under penalty of perjury, I certify that I have read the EDS of American Management Systems ("Owner") and certify as follows:'. Below this box is a red-bordered box containing the text: '(1) I am authorized to execute this EDS recertification on behalf of the Owner and'. Below this box is a red-bordered box containing the text: '(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 "Edit Owner" next to the owner name to edit the ownership percentage. After entering the correct percentage, click "Update" to confirm the change.'

At the bottom of the screen, there are two buttons: 'Cancel' and 'Confirm'.

Figure 33: Recertify Owner Screen

- vi. After you have recertified an owner, note that the "Invite owner" and "Recertify owner" options are no longer available for the recertified owner



The screenshot shows the 'Post-Recertified Ownership Interests Screen' in the Online Economic Disclosure Statement (EDS) system. The screen is divided into two main sections: a left sidebar and a main content area.

The left sidebar contains the following links: General Information, Ownership Interests (highlighted), Income/Compensation, Retained Parties, Certifications, Fed Certifications, Acknowledgements, Appendix A, Appendix B, Appendix C, and Additional Info.

The main content area is titled '2. Ownership Information' and contains the following text:

Please provide ownership information concerning each person or entity that holds, or is anticipated to hold (see next paragraph), a direct or indirect beneficial interest in excess of 7.5% of the Applicant. 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: Each legal entity below may be required to submit an EDS on its own behalf.

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1. Click on the Add Owner button to add an owner, the Remove Owner button to remove an owner, and the Edit Owner button to edit an owner.

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To send your invitations, you must successfully submit your EDS to the City.
Invitations will be held until the EDS is submitted.

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.

At the bottom of the screen, there are five buttons: Add owner, Remove owner, Edit owner, Invite owner, and Recertify owner. Below these buttons is a table with the following data:

Owner	Ownership Percentage	Buttons
Best Group Engineering		+
Mr. Richard Best - (25.0%)		+
American Management Systems - (65.0%)		+
Bay Group - (85.0%)		+

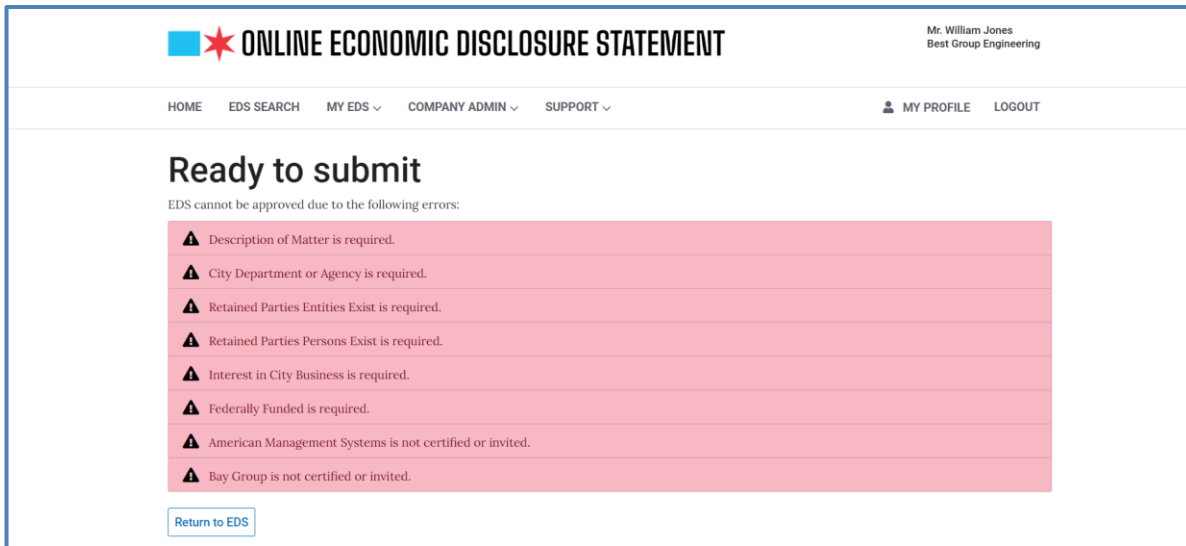
At the bottom of the screen, there are five buttons: Cancel, Previous, Next, Save, and Validate and Submit.

Figure 34: Post-Recertified Ownership Interests Screen

8. Review EDS Form Errors

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

i. All errors must be corrected before you submit your EDS document



The screenshot shows the 'ONLINE ECONOMIC DISCLOSURE STATEMENT' interface. The user is logged in as 'Mr. William Jones' from 'Best Group Engineering'. The navigation bar includes links for HOME, EDS SEARCH, MY EDS, COMPANY ADMIN, SUPPORT, MY PROFILE, and LOGOUT. The main heading is 'Ready to submit'. Below this, a message states 'EDS cannot be approved due to the following errors:'. A list of seven errors is displayed, each preceded by a red triangle icon: 'Description of Matter is required.', 'City Department or Agency is required.', 'Retained Parties Entities Exist is required.', 'Retained Parties Persons Exist is required.', 'Interest in City Business is required.', 'Federally Funded is required.', and 'American Management Systems is not certified or invited.'. The last error, 'Bay Group is not certified or invited.', is partially visible. A 'Return to EDS' button is located at the bottom left of the error list.

Figure 35: Sample Errors

- ii. To correct errors found during EDS Submission, click the "Return to EDS" button on the Ready to submit screen
- iii. Click on the tabs marked with an exclamation point inside of a triangle, to select a section that contains an error
 - These tabs are on the left side of the form
 - Click on the numbered pages/steps on the top of the EDS form with an exclamation point inside of a triangle Error details will be displayed in red below the numbered pages
- iv. Correct the error and click "Save" to save your changes
- v. Continue correcting errors until there are no more errors and click the "Validate and Submit" button

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American Management Systems is not certified or invited.

Bay Group is not certified or invited.

2. Ownership Information

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Add owner
 Remove owner
 Edit owner
 Invite owner
 Recertify owner

> Best Group Engineering	
Mr. Richard Best - (25.0%)	
> American Management Systems - (65.0%)	
> Bay Group - (85.0%)	

Figure 36: Errors Displayed on Form

9. Completion Steps

a. Reviewing your Document

- i. After all errors have been addressed and corrected, it is strongly recommended that you review your EDS document prior to submission
 - Save your document, then exit the form
 - Locate your document in the My EDS – Drafts table
 - Click the “Fill EDS” button to review the form
 - If you are confident that your EDS document is ready for submission, then click the “Validate and Submit” button

b. Electronic Signature

- i. On the Ready to submit screen, sign your document electronically
 - Enter the password you used to login to the Online EDS system
 - Enter the answer to the secret question you provided during registration
 - Click “Submit” to submit your EDS document or “Return to EDS” to continue working on the form

ONLINE ECONOMIC DISCLOSURE STATEMENT

Mr. William Jones
Best Group Engineering

HOME EDS SEARCH MY EDS COMPANY ADMIN SUPPORT MY PROFILE LOGOUT

Ready to submit

Under penalty of perjury, the person signing below: (1) warrants that he/she is authorized to execute this EDS, and all applicable appendices, on behalf of the Disclosing Party, and (2) warrants that all certifications and statements contained in this EDS, and all applicable appendices, are true, accurate and complete as of the date furnished to the City. Submission of this form constitutes making the oath associated with notarization.

If you are preparing this EDS for the signature of another, please click "Return to EDS" and click "Save". Do not enter your password or secret question or click "Submit". Then log out and ask the signer to log in and retrieve and review this EDS using the "Drafts" link. The signer must have his/her own Log In account, separate from yours. If necessary, please have the signer create a new Log In account using "Vendor Registration." When the signer clicks "Submit", the EDS will be submitted to the City under the signer's electronic signature.

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.

Password *

In what city were you born? *

Return to EDS Submit

Figure 37: Electronic Signature

c. Printing your EDS Certificate

- i. If you are the applicant and are submitting a Contract-related EDS, you will see the Print certificate screen. If you are an owner or if you are submitting an EDS for an Information Update, you will not see this screen
- ii. After your document has been submitted to the City, you will need to click on the “View certificate” button on the Print certificate screen

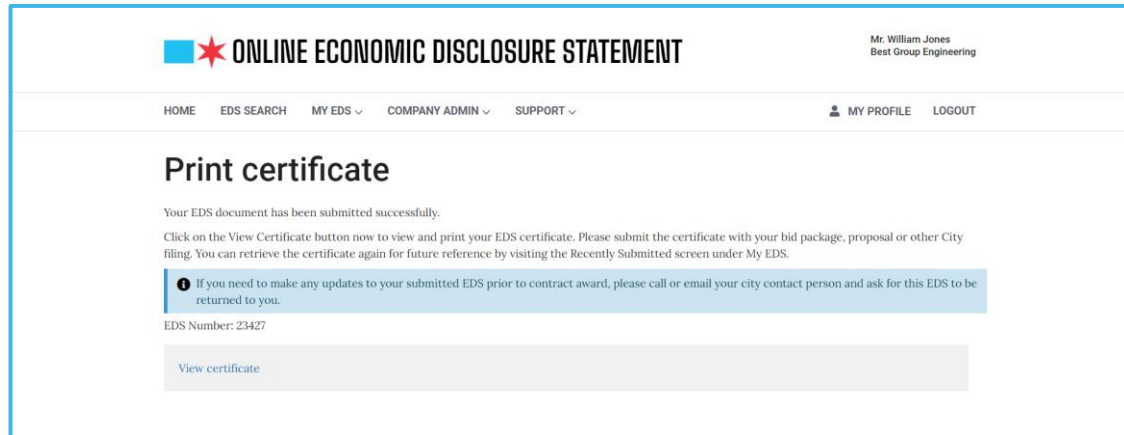


Figure 38: Print Certificate Screen

- iii. Print out your EDS Certificate of Filing from the PDF browser tab
- iv. Include it in your bid or proposal package that you are providing to the City on the matter in question

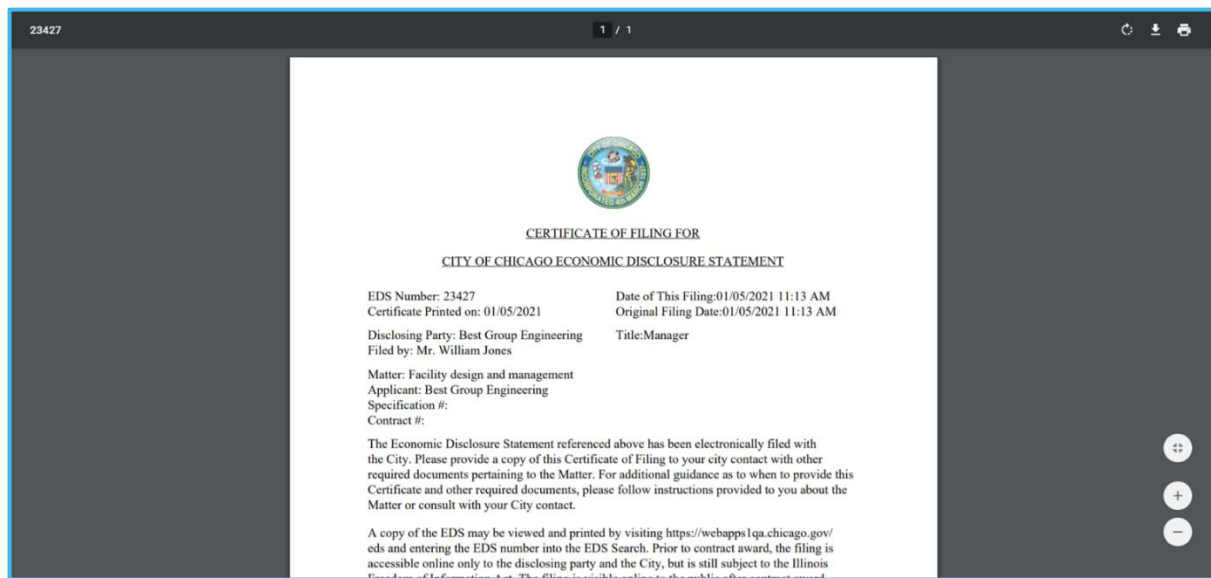


Figure 39: Certificate of Filing Browser Tab