

**Mental Health Services Oversight and Accountability Commission  
Conflict of Interest Code, Form 700 Designation**

**APPENDIX B**

**Disclosure Categories**

**Disclosure Category 1**

~~A person holding a position designated in this category must report all interests in real property, all sources of income (including gifts, loans, and travel payments) and investments and business positions in business entities of the type that contract with or receive grants or other monies from or through the state or local mental health systems, or that are licensed by, permitted by, regulated by, or provide consultant services to the state or local mental health systems.~~

A person holding a position designated in Disclosure Category 1 must report all investments and business positions in business entities, and all sources of income including receipt of loans, gifts, and travel payments in programs of the type that are submitted to the MHSOAC for approval.

**Disclosure Category 2**

~~A person holding a position designated in this category must report all sources of income, including gifts, loans, and travel payments, and investments and business positions in business entities of the type that contract or receive grants or other monies from or through the state or local mental health systems, or that are licensed by, permitted by, regulated by, or provide consultant services to the state or local mental health systems.~~

A person holding a position designated in Disclosure Category 2 must report all investments, business positions in, and any income, including gifts, loans, and travel payments, from sources of the type that provide services, equipment, materials, vehicles, supplies, to the MHSOAC including but not limited to:

- Contracts to evaluate the outcomes and performance of the Mental Health Services Act and the community mental health system
- Contracts related to Commission and Committee meetings and community forums such as court reporters/transcriber, interpreters, leased facilities, and public relations
- Contracts related to training, consulting, or stakeholder involvement
- Interagency agreements with other state entities such as CalHR, University Enterprise Inc. (student assistants)

### **Disclosure Category 3**

~~A person holding a position designated in this category must report all sources of income, including gifts, loans, and travel payments and investments and business positions in business entities of the type that provide supplies, materials, machinery, or equipment of the type acquired by the agency.~~

A person holding a position designated in Disclosure Category 3 must report all investments, business positions and all sources of income, including gifts, loans, and travel payments from sources of the type that engage in the information technology field, including but not limited to, training and consulting which are of the type utilized by the MHSOAC.