HOW TO FILE
CAMPAIGN FINANCE REPORTS ONLINE

For Pinellas County Candidates, Political Parties and Political Committees

How to File Financial Reports Online: A Handbook for Candidates & Committees

For assistance, please contact:

Pinellas County Supervisor of Elections Office

13001 Starkey Rd., Largo, FL 33773

727-464-4987 / VotePinellas.gov / Comms@VotePinellas.gov

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Online Financial Report Overview

As you know, Florida law requires that candidates and political committees file monthly reports with the Supervisor of Elections. These reports detail all contributions received and expenditures made by or on behalf of the candidate/committee. The **Voter Focus Campaign Financial Reporting** system gives campaign treasurers an easy way to complete and, optionally, file these required reports online.

Each report generated by the Campaign Financial Reporting system is a PDF file that can be viewed in Adobe® Acrobat® Reader. The PDF can be printed if your county requires hard-copy filing. In counties that accept electronic filing, the PDF can be submitted online, signed by the candidate's and treasurer's electronic personal identification numbers (PINs).

Once a report is accepted by the Supervisor of Elections, it appears on the elections website and can be viewed by the public.

Here's an example of a monthly report. First, there's a summary page.

After the summary pages, are itemized lists of contributions, expenditures, and then distributions.

The last listed are fund transfers.

Create Reports Online

To create reports online, you must have access to:

- A computer equipped with:

    - An Internet connection.

    - A web browser configured to accept cookies and with pop-up blockers disabled.

    - Adobe® Acrobat® Reader, which you will need to view and print your reports. If you don't have the Reader software on your computer, you can download it free of charge from www.adobe.com.

- A candidate ID and password. This will be provided to you by the elections office.

    - Candidates need a new ID each time they run for office, even when they are running for re-election to the same office.

    - Committees may also need a new ID for each election. Although, Committees of continuous existence typically can keep the same ID.

    - The password can be changed after you log in. See Change a Password or PINs for instructions.

- PINs for the candidate and campaign treasurer password.

    - Two 4-digit PINs will be provided to you by the elections office. You can change the PINs after logging in. See Change a Password or PINs for instructions.

How to Login to the C-Finance Portal

> **Important: Log in to only one instance of the Campaign Financial Reporting system in your browser. Having the system open in multiple browser windows at the same time can cause undesirable results.**
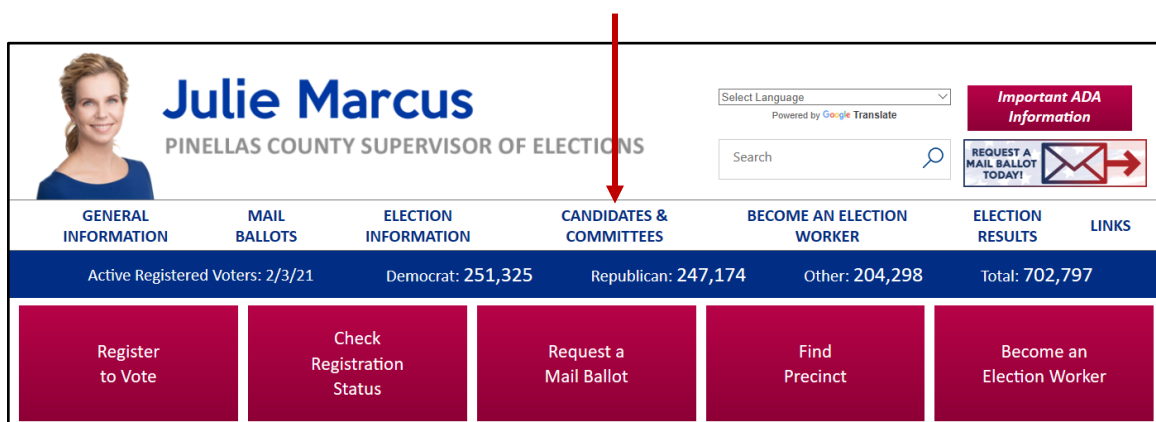
1 Type this web address into your browser: **VotePinellas.gov/CFinance**
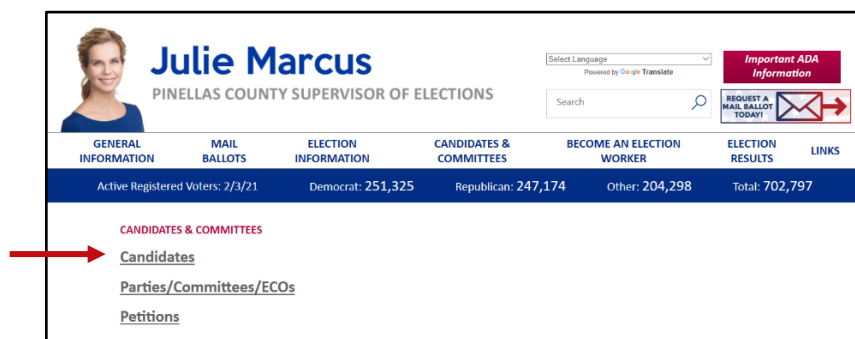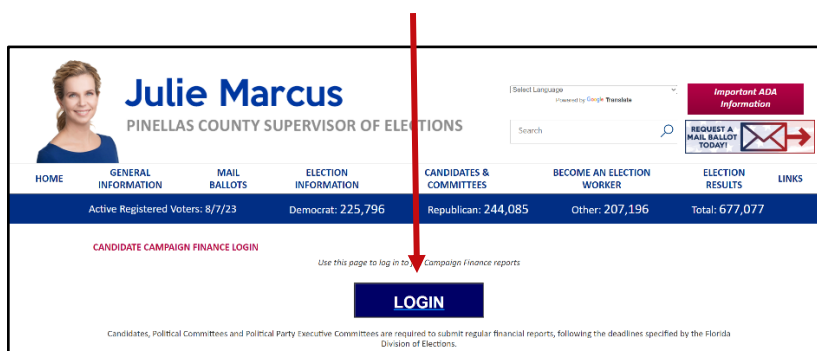
A. Click the "Login" link.
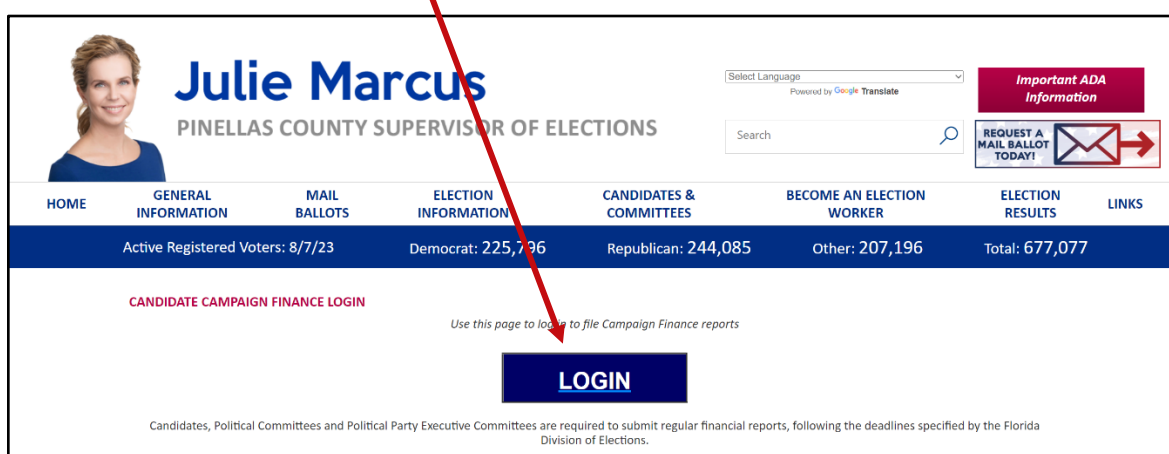
OR

2 Go to VotePinellas.gov and select "Candidates & Committees" from the navigation bar at the top of the homepage.

A. Then, select the "Candidates" link.

B. Next, select the "Login" link.

1. You'll then see the Candidate Log In page:

2. Enter your candidate ID and password.

   The password is case-sensitive. That means you have to enter the password in exactly the form given to you by the elections office: if a letter is uppercase, you must enter it in uppercase; the same goes for lowercase letters. Your password might also have numbers.

   Note: You can change your password once you log in. See Change a Password or PINs for more information.

3. Select **Login**.

C-Finance Reporting System Main Page

The main page of the Campaign Finance Reporting System that displays when you log in is called the Report List. It shows the reporting periods for the campaign and the following information:

- Election
- Your candidate ID
- Office or issue
- Your name

Candidate/Committee : Carolyn J. Casadonte (312)

Office : County Commission, District 3

| Log Out | Edit Candidate/Committee Bio Information/Upload Photo | Change Password/PINs |

| Export All Transactions CSV |

| Help |

Press Help for information on using the **new 'Import Entries' feature**.

Candidate Reports			
Election : County 2015 (2015-11-04)			
Past Reporting Periods Current Reporting Periods Future Reporting Periods			
Rpt Date	Total Contrib	Total Exp	Status
2015-5 (05/01/2015 - 05/31/2014) 6/3/2015	-	-	No Data Entered **This report is now overdue 1 day.** Unlock this report — Import Entries / Enter Contribution / Enter Transfers / Enter Expenditures / Enter Distributions / Prepare Totals / Create Waiver Report
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	-	-	No Data Entered — Import Entries / Enter Contribution / Enter Transfers / Enter Expenditures / Enter Distributions / Prepare Totals / Create Waiver Report
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	$50.00 (1 item)	-	Submitted #1073251 Unlock this report — View Contributions / View Transfers / View Expenditures / View Distributions / Print / Amend / Export CSV

Time Periods When Financial Reports are Required

Colors indicate reporting periods:

Past Reporting Periods (beige)

Current Reporting Periods (green)

Future Reporting Periods (blue)

The reporting periods are color-coded to help you choose the correct period for reporting data.

The past and future reporting periods are locked to prevent you from inadvertently entering current data into a past or future report. If you need to enter past or future data, you can easily unlock the report by clicking **Unlock this report**.

The colors of the reporting periods switch automatically at midnight on the due date of the current report.

If any of your reports are overdue or the due date is less than ten days away (that is, nine or fewer days from today), you'll see a message like this at the top of the page:

Note: After 180 days, overdue reports are no longer highlighted as late. And the due/overdue report(s) are highlighted as well.

If a report is overdue, you must take immediate action to file the report.

Current Reporting Period Diagram

Name of reporting period

Contributions so far

Expenditures so far

Command buttons for entering data.

We'll look at these more closely on the next page.

Start and end dates of reporting period

Date when report is due

Status of the report.

In this example, the candidate has started entering some of their contributions for the current reporting period, but hasn't entered their contributions or submitted their report yet to the elections office.

The Command Buttons

If you use campaign finance reporting software like Campaign ToolBox™, you can import contributions and expenditures directly from that application.

To manually enter contributions and expenditures, click here.

We'll talk more about manual entry on the next page.

Submit your report to the elections office.

If your county requires submission of paper reports, the button will look like this instead:

Submit

Create a spreadsheet of the contributions and expenditures entered in this reporting period.

Create and view a draft copy of your report for this period prior to submitting to the elections office.

Click here to manually enter fund transfers and distributions.

View and Maintain Contributions

Add a New Contribution

If the contributor is an organization rather than an individual, enter the organization name in the **Last** field.

And leave the **First** and **Middle** fields blank.

Most of the entry fields are self-explanatory. The blue column has tips on what's required.

When you've completed the form, click **Submit**.

If the system says you've omitted required information, you must provide it before the contribution can be saved.

After the contribution is saved, you'll get another blank form where you can add the next contribution.

Click **Cancel and return to list** when you've saved the last contribution you want to add right now.

The **Contribution Type** should be one of these:

Carry Over Funds	Remaining "carry over funds" from an election that has ended. This option is for use by candidates only.
Cash	Cash or cashier's check.
Check	Traditional paper check, wire transfer, PayPal, credit card, or another type of electronic funds transfer.
In-kind	An item of value other than money or volunteer services. In-kind Description: Enter a specific description of the in-kind contribution. Example: Food and beverage
Interest	Money earned on campaign or interest-bearing accounts.
Loan	Money loaned to the campaign rather than given outright.
Membership Dues	Membership dues regardless of the form (cash, check, etc.).
Money Order	Contribution made by money order.
Multiple Uniform Contributions	Multiple uniform contributions from the same person This option is for use by committees only.
Refund	Bad checks or contributions returned (in whole or in part) to the contributor. Refunds must be entered as a negative amount.

Add a New Expenditure

Click

Import Entries
Enter Contributions
Enter Expenditures
Prepare Totals
Submit
Export CSV

to bring up a list of the expenditures recorded so far:

Campaign Treasurer's Report - Itemized Expenditures

Election : County 2015 (2015-11-04)
Report Date : 2015-6
(2015-06-01 – 2015-06-30)
Add Expenditure Return to Report List

	Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Edit Delete	1	6/4/2015	Davis Communications P.O. Box 3488 Tallahassee, FL 32432	Retainer for advertising.	Monetary		$500.00
						Total	$500.00

Add Expenditure Return to Report List

Click **Edit** to modify details on an existing expenditure.

Click **Delete** to remove the entry altogether.

Takes you back to the Report List.

Click **Add Expenditures** to bring up the form for entering expenditures.

Date	5 ∨ / 22 ∨ / 2009 ∨	Date of item (mm/dd/yyyy)
Vendor Last Name	Last ___ First ___ Middle ___	Enter last name or company name if a business
Address 1	___	
Address 2	___	
City	___ ST ___ Zip ___	
Amount $	___	
Purpose	___	Type the purpose of the expenditure.
Expenditure type	Monetary ∨	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

Submit   Cancel

If the vendor is an organization rather than an individual, enter the organization name in the **Last** field.

And leave the **First** and **Middle** fields blank.

Date	8 ▼ / 8 ▼ / 2014 ▼	Date of item (mm/dd/yyyy)
Vendor Name	Last [___] First [___] Middle [___]	Enter last name or company name if a business
Address 1	[___]	
Address 2	[___]	Not sure which **Expenditure Type** to choose? Click this link to the Dept. of State website for more information.
City	[___] ST [__] Zip [___]	
Amount $	[___]	
Purpose	[___]	Type the purpose of the expenditure.
Expenditure type	Monetary ▼	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

Dropdown options:
Monetary
Petty Cash Withdrawn
Petty Cash Spent
Transfer to Office Account
Refund
Disposition of Funds
Disposition of Funds to Future Campaign
Disposition of Funds to Political Party
Disposition of Funds to Petition Verification
Reimbursements

About Petty Cash

In Expenditure Type, notice that there are two types for petty cash:

- Use Petty Cash Withdrawn when withdrawing funds from the campaign account for petty cash. This will add an expenditure of the entered amount to your report.
- Use Petty Cash Spent to record an expense out of petty cash.
- Petty Cash Spent does not add an expenditure to the report because the expenditure was already recorded as Petty Cash Withdrawn.

It's important to keep accurate petty cash records so your final report will balance.

When you've completed the form, click **Submit**.

After the expenditure is saved, you'll get another blank form where you can add the next expenditure.

Click **Cancel** when you've saved the last expenditure you want to add.

The **Expenditure Type** should be one of these:

Disposition of Funds	Pro-rata refunds to contributors, donations to charitable organizations, donations to the State general revenue fund, or the return of matching funds to the State.
	Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.
Disposition of Funds to Future Campaign	Funds transferred to an account for a future campaign.
	Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.
Disposition of Funds to Petition Verification	Funds transferred to pay for previously unpaid petition verification fees.
	Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.
Disposition of Funds to Political Party	Funds given to the political party that the candidate is a member of.
	Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.
Monetary	General expenditure type used when a specific type does not apply.
Petty Cash Spent	Petty cash spent during a reporting period.
	Expenditures made from petty cash are not required to be reported individually.
Petty Cash Withdrawn	Petty cash withdrawn during a reporting period.
	Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.
Refund	A refund of money from a vendor or other source.
	Refunds must be entered as a negative amount.
Reimbursements	Compensation made to a person or group by a check drawn on the campaign account for expenses incurred in connection with campaign activities.
Transfer to Office Account	Funds transferred to an office account when the candidate has been elected.

Add Contributions and Expenditures Overview

If you enter a contribution or expenditure outside of the range of the reporting period you are working with, the system will automatically try to find a reporting period that contains that date you are reporting.

If a report for that range is found, the system will let you know.

Click the report that you would normally have filed the transaction under, and then click **Select**.

If the contribution or expenditure date falls within the date range of a report that has already been filed, you can add the contribution or expenditure to the report and file an amended report in one easy step.

Click the report that you would normally have filed the transaction under and then click **Select**. A confirmation message will appear letting you know that the amended report has been filed.

If no report exists that includes the date you are trying to report, the system will let you know that too.

Click **Close** and either change the transaction date or contact your county Campaign Finance Administrator for assistance.

Preview a Report

Previewing of reports isn't required. But it's a good idea to preview the report before you submit it, to catch any data entry errors, missing transactions, or other anomalies.

You can preview a report as many times as you like, make changes, and preview it again until you are confident it is correct and complete. Then you can submit the finished report to the Supervisor. Once a report has been submitted, it cannot be changed, so you want to be sure you preview each report carefully.

Important: Previewing a report DOES NOT submit the report to the Supervisor.

To preview your report at this point, click **Prepare Totals** (shown below) to open the Prepare Totals page.

Click **Prepare Totals** on the page to total the contributions and expenditures for this reporting period. You are returned to the Report List, which now has a banner like this:

Note: If you haven't installed Acrobat Reader on your computer, you must do it now. Click the **Acrobat Reader** icon to go to the download site.

Click **Preview** in the banner to open your report in PDF format.

Check the draft report carefully to verify everything is correct and complete.

The preview version of the report has a DRAFT watermark on each page.

The elections office cannot accept a draft report. You must submit a final report.

Tip: Forgot to add a contribution or expenditure? That's OK! You can continue to add them after your preview.

On the Report List, notice that the **Prepare Totals** button is now labeled **Preview**.

Click **Preview** at any time to display the report. If transactions are added, the button label returns to **Prepare Totals**, which means you need to total the new transactions in the report before you can preview it again.

Record a Distribution

A transaction is a distribution only if it is a:

- **Credit Card Payment**—Linked to the expenditure that represents payment of the credit card bill on which the purchase appears. Only statewide candidates may use this type of distribution.

  Each purchase made with the credit card will be itemized under [Enter Distributions] and linked to the expenditure that represents payment of the credit card bill on which the purchase appears. The credit card may be used only for travel-related expenses.

- **Prepaid Distribution**—Reserved for up-front, lump sum payments to be disbursed to different entities at a later date. (For example, payment to a media consultant who then makes disbursements to newspapers and television stations.) Related entries under [Enter Distributions] will be reported and linked to the expenditure as they occur.

- **Reimbursement**—Reimbursement for authorized expenses made in connection with the campaign. (For example, Candidate Smith paid for printing of campaign signs with his own money. A check to reimburse him for the cost would be recorded as a Reimbursement.)

Distributions do not add to your report totals. They are used only to report pro-rata amounts of an already recorded expenditure to provide detail for:

- Refunds to contributors.
- Donations to charitable organizations.
- Contributions to political parties.
- Donations to the State general revenue fund.
- Return of matching funds to the State.

To record a distribution:

1. Click **Enter Distributions** (shown below) to open a page with descriptive requirements for a distribution transaction.
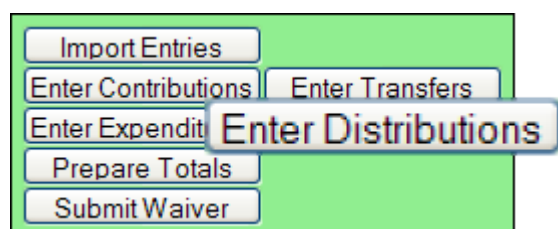
2. Then click **Proceed with Distribution** to see the following page:

3. Click **Add Distribution** to open the form used to enter distributions.

4. If the entity receiving the distribution is an organization rather than an individual, enter the organization name in the Last field.

5. When you complete the form, click **Submit** to save the information. After the distribution is saved, a blank form opens to enter another distribution.

6. Click **Cancel** after you save your last distribution. You'll see the distributions you added highlighted in yellow, as in this example.

Transfer Funds

Fund transfers are typically used only by candidates for state and federal offices. They are used to report the transfer of funds between the primary depository and separate interest-bearing accounts.

1. Click **Enter Transfers** (shown below) to open the Itemized Fund Transfers page.

2. Click **Add Fund Transfer** to open the form used to enter transfers.
3. Enter the financial institution where the account is held.

4. Select one of the following:

    - **To**, if the transfer is from the campaign account to the institution account.

    - **From**, if the transfer is from the institution account to the campaign account.

5. When you complete the form, click **Submit** to save the information. After the transfer is saved, a blank form opens to enter another transfer.

6. Click **Cancel** after you save your last transfer. Transfers are not shown on the Reports List because the funds are simply moved within the campaign or committee, rather than expended or distributed elsewhere.

Import Data from Campaign Application

Import File Requirements

The system can import any file that meets the Division of Elections Campaign Finance Reporting File Specifications:

DOS.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign- reports/

For a list of State-approved software vendors for electronic filing, see:

DOS.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign- reports/vendors/

Candidates or committees using campaign finance reporting software, such as Campaign ToolBox™, can import contribution, expenditure, distribution, and fund transfer data from a file created by the application directly into the Campaign Financial Reporting system.

When you import data from a file, the transactions are added to the report you are working in. Be sure to review the report prior to submission to verify the data matches what you intended to import and make any adjustments manually.

Important: When you import a file from your campaign finance reporting software, if there are existing entries in the Campaign Financial Reporting system for the reporting period you are importing entries in to, these entries will be replaced with the information from your file.

Note: Before importing a file, verify that you have not manually entered contributions, expenditures, distributions, or fund transfer data into the Campaign Financial Reporting system. If so, verify that these entries also exist in your campaign finance reporting software.

Current Reporting Period

To import data for the current reporting period:

1. On the main page, locate the row for the current reporting period (look for the green row) and click **Import Entries**

2. On the Upload Report page, click **Browse**, locate the file to import, and click **Upload Report**.

You'll see a display of the transactions imported from the file, as in this example:
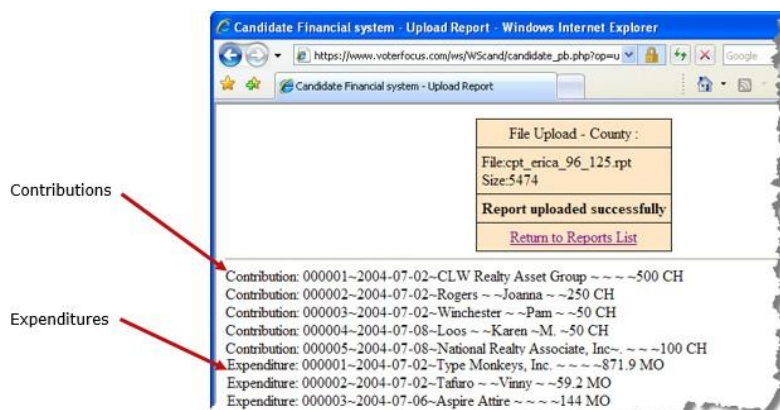
3. When you finish importing entries for the reporting period, preview and submit the report.

Past and Future Reporting Periods

- **Past reporting period**—If you already submitted the report for the past reporting period, you'll need to unlock it and create an amendment. Then you'll need to unlock the amendment and follow the Import Entries instructions in the previous procedure.

- **Future reporting period**—Unlock the reporting period and follow the Import Entries instructions in the previous procedure.
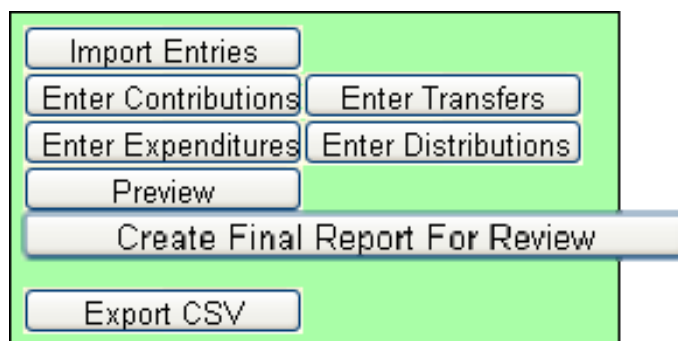
Submit a Report

Important: Make sure you have entered ALL contributions and expenditures correctly before you click **Submit Report**. Clicking Submit Report closes the report.

Once you do this, the report cannot be changed, although it can be amended. See Change a Filed Report for more information.

Submit Electronic Reports

1. To finalize the report, click **Create Final Report For Review** to display instructions.

Create Final Report For Review

Candidate : **Carolyn J. Casadonte (312)** Office : **County Commission, District 3**
Report Period **06/01/2015-06/30/2015** Due Date **7/10/2015**
Contributions **$425.00** Expenditures **$500.00**
Transfers **$0.00** Distributions **$0.00**

By submitting this campaign finance report that the same is considered to be certified as to correctness within the meaning of Section 106.07(5) Florida Statutes, by the candidate and the candidates treasurer, in the case of a candidate, or the political committee's chair and treasurer, in the case of a political committee or county executive committee, and that such persons are subject to the previsions of Section 106.07(5) Florida Statutes.

PLEASE NOTE: This report is NOT filed until it is electronically signed by the Candidate/Committee and Treasurer using their respective electronic PIN.

2. When you finish your entries for this reporting period and you are ready to file, click **Create Final Report For Review**. The Electronic Signature PINs page opens with a reminder that the report is not yet been submitted followed by an online view of the report.

3. You can do the following:

- Enter both PINs in the space provided and click **Assign PIN** to submit the report to the Supervisor of Elections

4.

- Enter just one of the PINs and click **Later** to return to the Report List.

The message *Signature (PINs) Required* appears in the report's **Status** column and the report is then locked, which means no changes can be made.

5. When the report is ready to be signed with the other PIN, click **Assign PIN(s)** to reopen the PIN page.
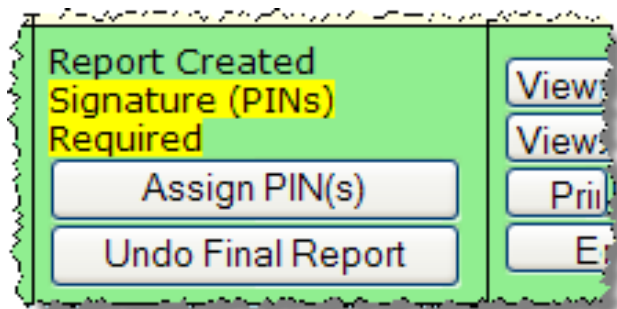
6. Enter the missing PIN and click **Assign PIN** to submit the report to the Supervisor of Elections.

    Note: If you want to remove the PINs and unlock the report so you can make changes, click **Undo Final Report**.

Review a Submitted Report

The DRAFT watermarks are gone...

and your confirmation number is displayed in the **Office Use Only** box along with the date and time you submitted the report.

Notice that the **Original** box is selected in the **Report Identifier** section.

It indicates that this is the original report for this reporting period.

Should you later file an amendment to this report, the **Amendment** box will be selected instead.

Confirm the Report is Available on the Website

Most counties reserve the right to review reports before releasing them to the public. Typically, when the report status changes to *Received*, the report is available on the website, but this can vary, so check with your county to find out what you can expect.

To get to your candidate page, website visitors select your name from the list of candidates running in a selected election. (The elections office will explain how to navigate to this list—it varies by county.)

Your candidate page will list all reports that the elections office has released to the website.

Website visitors can click the report name in the Report Views Transactions column to display a list of all transactions reported so far, grouped by type.

Candidate: Carolyn J. Casadonte

Office: County Commission, District 3

Report Date: 6
(6/1/2015 - 6/30/2015) Amended

| Back ◄ | Print 🖶 | Export ⬇ |

Campaign Treasurer's Report - Itemized Contributions

Seq# Date	Contributor	Entity	Occupation Amend	Cont. Type	Amount
1 6/4/2015	Anna Barber 344 Henderson Road Palmetto, FL 32312	Individual	Add	Cash	$50.00
2 6/4/2015	Marsha Kirk 344 Henderson Road Palmetto, FL 32312	Individual	Add	Check	$75.00
			Total Contributions		**$125.00**

Campaign Treasurer's Report - In-Kind Contributions

Seq# Date	Contributor	Entity	Occupation Amend	In-Kind Description	Amount
2 6/4/2015	Reid Roger 45 Wilson Blvd Palmetto, FL 32432	Individual	RestaurantOwner Add	Campaign planning dinner	$300.00
			Total In-Kind Contributions		**$300.00**

Campaign Treasurer's Report - Itemized Expenditures

Seq# Date	Vendor	Purpose	Exp. Type Amend	Amount
1 6/4/2015	Davis Communications P.O. Box 3488 Tallahassee, FL 32432	Advertising	Monetary Add	$500.00
			Total Expenditures	**$500.00**

Contributions from persons with protected address status are not shown in reports. Instead, the notation ***Protected*** is shown in place of the address. The Campaign Financial Reporting system scans the county's voter registration database for voters with protected addresses and automatically redacts those addresses from campaign reports, so they cannot be seen by the public or the Supervisor's staff. If you are aware of a contributor with a protected address who is not in your local county's voter database, please advise your Supervisor of Elections.

Save A Copy of The Report

A copy of all the reports you file will continue to be available on the Campaign Financial Reporting system. If you want to keep a copy for your records, save the PDF to a folder on your computer or network.

To save a copy of the report:

1. Click **Print** to open the report in Acrobat Reader.
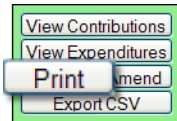
2. Click [save icon] . Save the PDF to a location on your computer or network. You might consider giving the copy a different file name; names assigned by the system are cryptic.

Change a Filed Report

After a report is submitted to the elections office, you cannot change it. But you can make an amendment. An amendment is a separate report for the reporting period. On the amendment's first page, you'll see a check mark in the Amendment box. This box is automatically selected when you create an amended report.

You can amend a report any time after you submit it. When the original report's status is *Submitted*, you can add new contributions and expenditures, but you cannot change data on the original report. To change original data, the original report's status must be *Received*.

You can create an amendment to a report for any reporting period. The steps to do this are the same for all reporting periods with one exception; for past reporting periods, you must first unlock the report.

Amendment in Current Reporting Period

To create an amendment to a report in the current reporting period:

Then click **Create**.

When the Report List reappears, notice that there's now a new row for the current reporting period.

Enter the new data using these buttons, just like you did on the original report.

To create an amended report, you can:

- Manually enter new contributions and expenditures.
- Import new contributions or expenditures.
- Change or delete items listed on the original report.

The totals of items on the amended report are displayed just as they were for the original report.

When you are finished entering items, preview the report and submit it to the elections office. You'll see a new confirmation number for the amendment.

If your county requires a hard copy of amended reports, print the report, sign it, and deliver it to the elections office.

If you need to change a report after submitting the amendment, talk to the elections office. Some counties require a second amended report. Other counties have different procedures.

Amendment in Past Reporting Period

To create an amendment to a report in a past reporting period:

Create an amended report following the instructions for the current reporting period.

Remove an Amended Report

Oops! I didn't mean to create an amended report!

That happens sometimes.

If you begin creating an amended report, notice that the list of commands on the Report List includes the command **Delete Report**. To back out of the report, first delete all the transactions you entered for the amended report. Then, once there are no transactions for the amended report, you can click **Delete Report** to delete it from the system.

Change or Delete an Item on an Original Report

First, verify that the status of the original report is *Received*.

To change data that was entered on the original report, the original report's status must be *Received*.

To change a contribution or expenditure:

1. In the current reporting period (the green row), click **Amend** to display the Amend Report page.

2. Next, click **Create**.

When the Report List reappears, notice that there's now a new row for the current reporting period.

Enter the new data using these buttons, just like you did on the original report.

3. On the Report List, use any of the buttons as you did on the original report to enter the new data.

4. On the next page, click **Amend Item from Orig Report** to display a list of items (for example, contributions) reported in the current month.

Campaign Treasurer's Report - Itemized Contributions

Election : County 2015 (2015-11-04)
Report Date : 2015-6
(2015-06-01 - 2015-06-30)
Add Contribution Return to Report List Amend Item from Orig Report

Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
							Total	$0.00

Add Contribution Return to Report List

5. Highlight the item you want to change and click **Amend Item**. Detail for that item displays.

To change an item, highlight it.

The following list is the list of the items on the **original** report that you are amending.

Select the item to amend and you will be given a screen to enter the new values for the item.

1 Barber, Anna (2015-06-04) $100.00
2 Kirk, Marsha (2015-06-02) $50.00
3 Smith, Reid (2015-06-02) $300.00
4 Barber, Anna (2015-06-04) $50.00
5 Kirk, Marsha (2015-06-04) $75.00
6 Roger, Reid (2015-06-04) $300.00

Then click **Amend Item**.

Amend Item

6. Make your changes in the appropriate fields and click **Submit**.

This page shows the details for the item as they were entered into the original report.

Amend Report - Enter changes to this item

To change an item, just make your changes in the appropriate fields.

To delete an item, type a zero (0) in the **Amount** field.

When finished, click **Submit**.

Date	6 / 2 / 2015 — Date of item (mm/dd/yyyy)
Contributor Name	Last Kirk / First Marsha / Middle — Enter last name or company name if a business
Address 1	8899 Hillcrest Drive
Address 2	
City	Palmetto ST FL Zip 32312
Amount $	50.00
Contributor Type	Individual — Select the type that best describes this contributor
Contributor Occupation	The occupation of the contributor is only required if the amount is over $100
Contribution type	Cash — Per F.S. 106.09 effective 01/01/08 - A person may not make or accept a cash contribution in excess of $50.
In-kind Description	Type the description of any In-kind contribution.

Submit Cancel

List Contributors

You now have two entries (in yellow) representing the changed item:

- The first entry deletes the item as it was filed in the original report. (Notice the word *Delete* in the Amend column.)

- The second entry adds the item with the changed values. (The Amend column shows *Add*.)

In this example, we changed the contribution amount from $50.00 in cash to $100.00 by check.

Campaign Treasurer's Report - Itemized Contributions

Election : County 2015 (2015-11-04)
Report Date : 2015-6
(2015-06-01 - 2015-06-30)
Add Contribution Return to Report List Amend Item from Orig Report

	Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
Edit Delete	1	6/2/2015	Marsha Kirk 8899 Hillcrest Drive Palmetto, FL 32312	Individual		Cash		Delete	$50.00
Edit Delete	2	6/2/2015	Marsha Kirk 8899 Hillcrest Drive Palmetto, FL 32312	Individual		Check		Add	$100.00
								Total	50.00

Add Contribution Return to Report List

Deletes the original item.

Adds the changed item in its place.

If needed, you can now change another item, add a new item, or return to the Report List.

Submit a Waiver

A waiver is a one page report that you fill out and submit to the elections office to notify there is no activity for a reporting period. In any reporting period when there has been no fund activity (expended or received), filing the report is required.

1. On the Report List, find the reporting period that you want to submit a waiver for.

2. Click **Create Waiver Report**.

3. On the next page, click **Create Final Report for Review** to open the Electronic Signature PINs page with a reminder that the report has not yet been submitted.

   Note: For committees set up as Type - Electioneering Communication, a waiver is no longer generated when clicking Create Final Report for Review with no contributions or expenditures applied.

4. Enter both PINs in the spaces provided and click **Assign PIN** to submit the waiver to the elections office.

Unlock a Report

Have you noticed that reports for past and future reporting periods have an

 button?

These buttons prevent you from accidentally entering data for the current reporting period in a past or future period.

If you find that you need to amend a past report or enter data for a future report, click **Unlock this report**.

For past reporting periods, you'll then see options for amending the report.

For future reporting periods, you'll see the usual buttons for entering data.

Export Data to a Spreadsheet

The system has two ways to export your financial data to a Microsoft Excel comma-separated values (.CSV) file. The **Export CSV** option collects all data for the selected report.
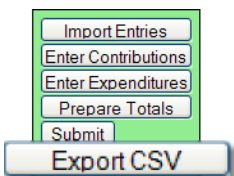
The **Export All Transactions CSV** collects all data from all reports in the election.

Both options create a file named *CFinExport.csv* in your C:\Temp folder.

When you click either button, you'll see a message asking if you want to open or save the file. You can view the file immediately or save it to a different name and location.

The spreadsheet file contains this information:

- Date the item was recorded
- Whether it's a contribution (C) or an expenditure (E)
- Contributor or vendor name and address
- Contribution type
- Contributor's occupation
- Item type
- Description
- Amount
- Whether the item was recorded in the original report (blank) or an amendment (A)

Termination Report (TR) Filing

On the Report List, you will see a section for the termination report, which is the absolute last report that will be submitted by your campaign. This report states the financial status of your campaign after all contributions and expenditures have been reconciled. It should also show how any surplus funds were disposed of.

The termination report might not appear in the Report List at the beginning of the campaign, but the elections office will add it to your reporting dates at the appropriate time. Note that it might not be named *Termination Report*. The elections office can give it any name, such as 2023-Final.

When it's time to file the termination report, its row is green.

To file this report, you must add any outstanding contributions and expenditures that haven't been reported in an earlier report.

If surplus funds remain in the campaign account, the termination report should include an expenditure that disposes of those excess funds.

The TOTAL Contributions and the TOTAL Expenditures must equal; meaning the money that was deposited equals the amount that was withdrawn from the account.

The report cannot have more contributions than expenditures or vice versa; the totals must equal out.

Reset Password

If you forget your password, you can simply reset it by clicking the **Forgot Password** link on the Log In page.

| Numeric Candidate ID (no leading zeros) | | Password | | Login |

Forgot Password?

On the Candidate Forgot Password page, enter your Candidate ID number and click the **Reset Password** button.

Candidate Forgot Password

| Numeric Candidate ID (no leading zeros) | | Reset Password |

An email like the one below will be sent to the email address associated with your account. Click the link provided in the email.

Candidate Reports Reset Password   Inbox   x

websupport@vrsystems.com   12:31 PM (0 minutes ago)
to me

Carolyn J. Casadonte,
Please reset your password using the following link:

https://www.voterfocus.com/ws/wscanddev/candidate_resetpw.php?county=cfetraining&r=5571cef5450b27.75501507

This link will expire in 1 hour.
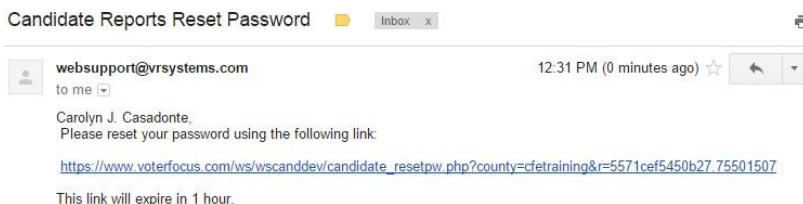
Note: If there is no email address associated with your Candidate ID, you'll need to contact your elections office.

On the Candidate Reset Password page, enter and reenter the new password, and then click **Reset Password**. The password can be up to 12 characters—letters and/or numbers—and is case-sensitive.

Candidate Reset Password

Enter a new password in the **New Password** field.

→ New Password

You'll need to enter the same password in the **Re-enter Password** field to confirm the new password.

→ Re-enter Password

Reset Password

Change a Password or PINs

You can change the password assigned to you by the elections office. A password can be any combination of letters and numbers.
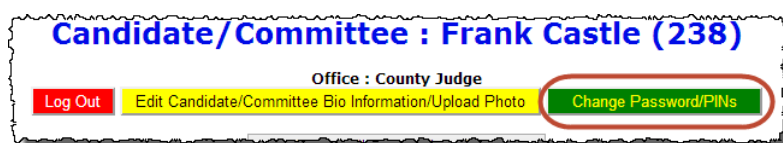
If your county required electronic filing of reports, your campaign has been issued PINs for the candidate and treasurer. You can also change these PINs, if you wish.

Change your password:

1. On the Report List, click **Change Password/PINs**.

2. In the Enter Old Finance System Access Password field, enter your current password. This step is required, even if you are only changing one or both PINs.

3. To create a new password, enter and reenter it in the two fields provided for the new password. The password can be up to 12 characters—letters and/or numbers—and is case-sensitive. If you don't want to change your password, don't make any changes to the password fields.

4. If you want to change a PIN, enter and reenter the new PIN in the two fields provided for the new PIN. Then enter your new password in the other two fields.

5. Click **Change Password/PINs** when you are finished.

From now on, you will log on with your new password.

If you set up the Candidate Log In page to automatically fill in your password, you must retype the password there the next time you log in. When you do, you might see this message:
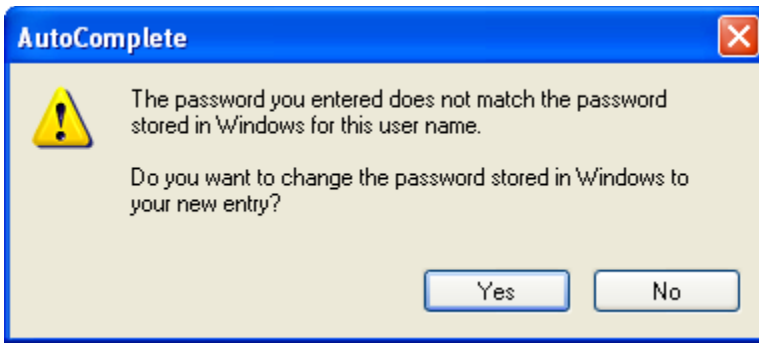
Simply click **Yes** to proceed into the Campaign Financial Reporting system.

Should you forget your new password, see the instructions for <u>resetting a password</u>. If you forget your PINs, contact the elections office. They will be able to retrieve them for you.

Log Out of the System

When you are finished with a session on the Campaign Financial Reporting system, be sure to log out so that unauthorized persons cannot modify your report data.

Log out of the system:

On the Report List, click **Log Out**.