

HOW TO FILE CAMPAIGN FINANCE REPORTS ONLINE

For Pinellas County Candidates, Political Parties
and Political Committees



REVISED AUGUST 2023

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

Last Updated: August 2023

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CONTENTS

Online Financial Report Overview	1
Create Reports Online	3
How to Login to the C-Finance Portal	4
C-Finance Reporting System Main Page	6
Current Reporting Period Diagram	8
The Command Buttons	9
View and Maintain Contributions	10
Add a New Contribution	11
Contribution Types	12
Add a New Expenditure	13
Petty Cash	14
Expenditure Types	15
Add Contributions and Expenditures Overview	16
Preview a Report	17
Record a Distribution	19
Transfer Funds	21
Import Data from Campaign Application	23
Current Reporting Period	24
Past and Future Reporting Periods	25
Submit a Report	26
Review a Submitted Report	30
Confirm the Report is Available on the Website	31
Save a Copy of the Report	33
Change a Filed Report	34
Remove an Amended Report	36
Change or Delete an Item on an Original Report	37
Submit a Waiver	40
Unlock a Report	41
Export Data to a Spreadsheet	42
Termination Report (TR) Filing	43
Reset Password	44
Change a Password or PINs	45
Logout of System	47

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

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

(1) Name Carolyn J. Casadonte (2) I.D. Number 312

(3) Cover Period 6/1/2015 / / through 6/30/2015 / / (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Contributor Type Occupation		(9) Contribution Type	(10) In-kind Description	(11) Amendment	(12) Amount
Sequence Number		Type	Occupation	Type	Description	Amendment	Amount
6/4/2015 / /	Barber, Anna 344 Henderson Road Delmonte, FL 32732	I		CA		Add	\$50.00
1							
6/4/2015 / /	Kirk, Marsha 344 Henderson Road Delmonte, FL 32732	I		CH		Add	\$75.00
2							
6/4/2015 / /	Roger, Reid 43 Wilson Blvd Delmonte, FL 32742	I	restaurant owner	IK	campaign planning dinner	Add	\$200.00
3							
/ /							
/ /							
/ /							
/ /							
/ /							
/ /							
/ /							
/ /							

D5-DE 13 (Rev. 11/13)

SEE REVERSE FOR INSTRUCTIONS AND CODE VALUES

How to File Financial Reports Online

CAMPAIGN TREASURER'S REPORT - ITEMIZED EXPENDITURES

(1) Name Carolyn J. Casadonte (2) I.D. Number 312

(3) Cover Period 6/1/2015 through 6/30/2015 (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
6/4/2015	Devia Communications, P.O. Box 308 Tallahassee, FL 32302	advertising	NO	Add	\$500.00
1					
//					
//					
//					
//					
//					
//					
//					
//					
//					

DS-DE 14 (Rev. 10/13) SEE REVERSE FOR INSTRUCTIONS AND CODE VALUES

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

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS

(1) Name Carolyn J. Casadonte (2) I.D. Number 312

(3) Cover Period 6/1/2015 through 6/30/2015 (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amendment	(11) Amount
6/4/2015	Eric Wu Campaign Account 222 South Street Tallahassee, FL 32302	mailouts	2015-2015-6-2		\$500.00
1					

The last listed are fund transfers.

CAMPAIGN TREASURER'S REPORT - FUND TRANSFERS

(1) Name Carolyn J. Casadonte (2) I.D. Number 312

(3) Cover Period 6/1/2015 through 6/30/2015 (4) Page 1 of 1

(5) Date	(7) Name of Financial Institution Street Address & City, State, Zip Code	(8) Transfer Type	(9) Nature of Account	(10) Amendment	(11) Amount
6/6/2015	SunBank, 487 Thomasville Rd Tallahassee, FL	TO	money market	Add	\$1,500.00
1					

Create Reports Online

To create reports online, you must have access to:

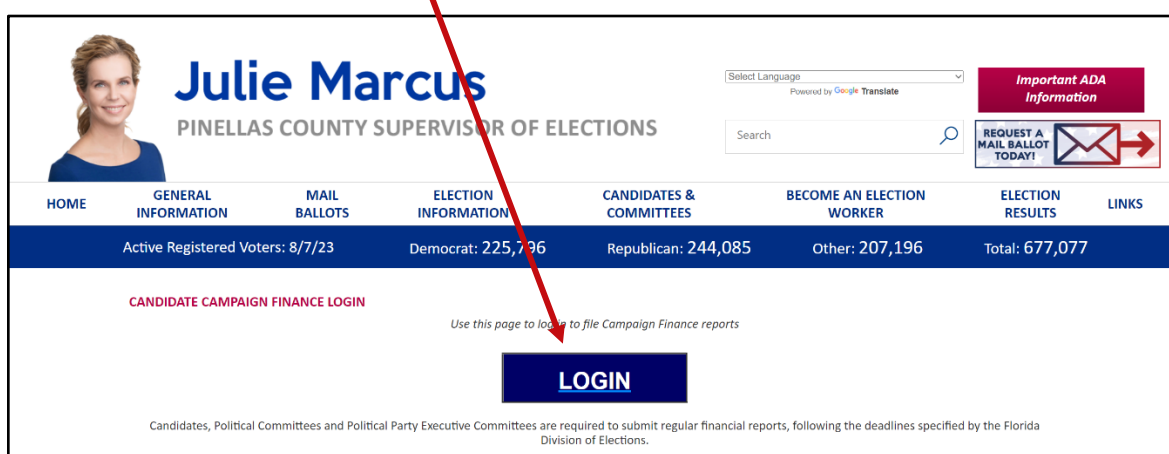
- A computer equipped with:
 - An Internet connection.
 - A web browser configured to accept cookies and with pop-up blockers disabled.
 - Adobe® Acrobat® Reader, which you will need to view and print your reports. If you don't have the Reader software on your computer, you can download it free of charge 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.

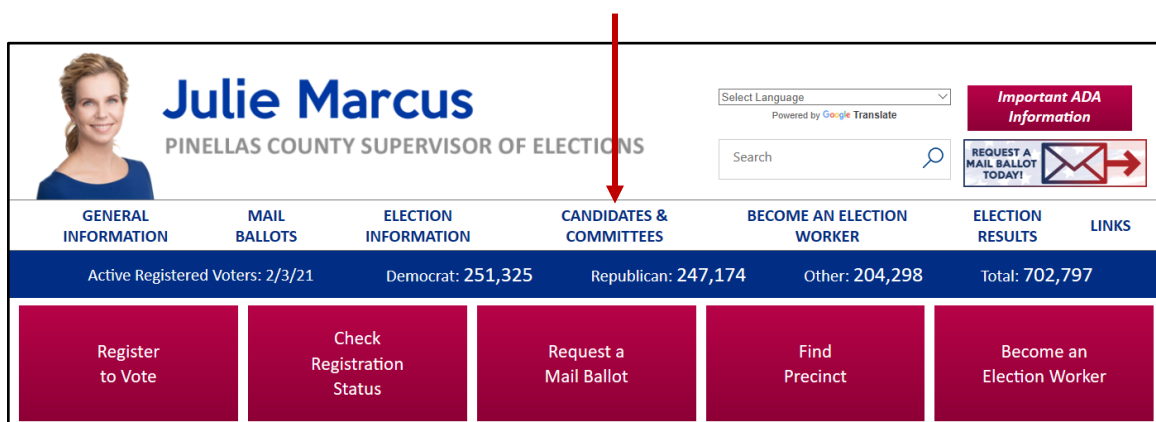
- 1 Type this web address into your browser: **VotePinellas.gov/CFinance**

A. Click the "Login" link.

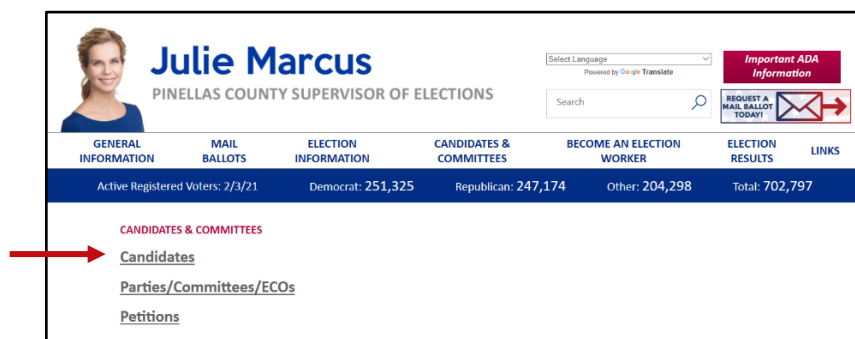


OR

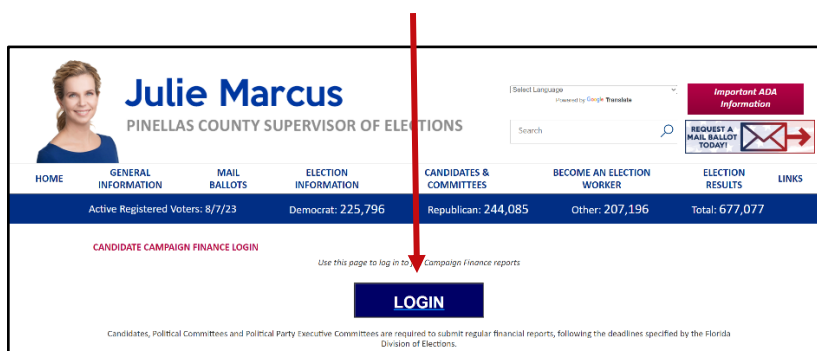
- 2 Go to VotePinellas.gov and select "Candidates & Committees" from the navigation bar at the top of the homepage.



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 Expenditure 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 Expenditure 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:

Warning!

Your 2015-5 report is now overdue 1 day.

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. <div>Unlock this report</div>	<div><div>Import Entries</div><div>Enter Contribution</div><div>Enter Expenditure</div><div>Prepare Totals</div><div>Create Waiver Report</div><div>Enter Transfers</div><div>Enter Distributions</div></div>

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.

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Transfers View Expenditures View Distributions Print Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	-	Not Filed Data Entry Started	Import Entries Enter Contribution Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Final Report For Review Export CSV
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

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.

The screenshot shows the 'Candidate Reports' interface for the 'Election : County 2015 (2015-11-04)'. It features a table with three reporting periods: 2015-5, 2015-6, and 2015-7. The '2015-6' period is highlighted in green, indicating it is the 'Current Reporting Period'. A green box with red arrows points to the 'Import Entries' button and the 'Enter Contribution', 'Enter Expenditure', 'Enter Transfers', and 'Enter Distributions' buttons. Another red arrow points from the text 'Click here to manually enter fund transfers and distributions.' to the 'Enter Transfers' button. A third red arrow points from the text 'Create a spreadsheet of the contributions and expenditures entered in this reporting period.' to the 'Import Entries' button. A fourth red arrow points from the text 'Create and view a draft copy of your report for this period prior to submitting to the elections office.' to the 'Prepare Totals' button. A fifth red arrow points from the text 'Submit your report to the elections office.' to the 'Submit' button at the bottom left. A sixth red arrow points from the text 'We'll talk more about manual entry on the next page.' to the 'View Contributions' button. The table data is as follows:

Rpt Date	Total Contrib	Total Exp	Status	View Contributions	View Transfers
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Expenditures	View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	-	Not Filed Data Entry S	Import Entries	Enter Contribution
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #163251 Unlock this report	View Expenditures	View Distributions

Annotations and their corresponding actions:

- Submit your report to the elections office.** Points to the **Submit** button at the bottom left.
- If your county requires submission of paper reports, the button will look like this instead:** Points to a **Submit** button in a box at the bottom left.
- Create a spreadsheet of the contributions and expenditures entered in this reporting period.** Points to the **Import Entries** button.
- Create and view a draft copy of your report for this period prior to submitting to the elections office.** Points to the **Prepare Totals** button.
- Click here to manually enter fund transfers and distributions.** Points to the **Enter Transfers** button.
- We'll talk more about manual entry on the next page.** Points to the **View Contributions** button.

View and Maintain Contributions

Click



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

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	Anna Lee Barber 45 Wilson Blvd Palmetto, FL 32312	Individual		Check		Add	\$100.00
								Total In Kind	\$0.00
								Total Monetary	\$50.00
								Total	\$50.00
Add Contribution Return to Report List									

[Edit](#) lets you modify details on an existing contribution.

[Delete](#) lets you delete the contribution altogether.

[Return to Report List](#)
Takes you back to the list of reporting periods.

The Totals rows show you a breakdown of In-Kind and Monetary contributions along with the combined total.

Click [Add Contribution](#) to bring up the form for entering contributions.

Date	5 / 22 / 2009	Date of item (mm/dd/yyyy)
Contributor Name	Last <input type="text"/> First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Contributor Type	Individual	Select the type that best describes this contributor
Contributor Occupation	<input type="text"/>	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	<input type="text"/>	Type the description of any In-kind contribution.
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

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.

The screenshot shows a web form for adding a new contribution. It is divided into two main columns: an orange column for data entry and a light blue column for instructions and tips. Red arrows point from text instructions to specific fields in the form.

Date		Date of item (mm/dd/yyyy)
9 / 15 / 2016		
Contributor Name		Enter last name or company name if a business
Last		
First		
Middle		
Address 1		
Address 2		
City		
ST		
Zip		
Amount \$		
Contributor Type		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		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.

Buttons at the bottom: Submit, Cancel and return to list, [List Contributors](#)

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 

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 <input type="text"/> First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Purpose	<input type="text"/>	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.
<input type="button" value="Submit"/> <input type="button" value="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.

The screenshot shows a web form for filing financial reports. It has two main columns. The left column contains fields for Date (8 / 8 / 2014), Vendor Name (Last, First, Middle), Address 1, Address 2, City, ST, Zip, Amount \$, Purpose, and Expenditure type. The right column contains instructions: 'Date of item (mm/dd/yyyy)', 'Enter last name or company name if a business', 'Type the purpose of the expenditure.', and 'Please refer to the [Campaign Treasurer Handbook](#) for the state of Florida to ensure you are using the correct transaction type.' Annotations include red arrows pointing from the text 'If the vendor is an organization rather than an individual, enter the organization name in the Last field.' to the 'Last' field, and from 'And leave the First and Middle fields blank.' to the 'First' and 'Middle' fields. A red box highlights the 'Expenditure type' dropdown menu, which lists 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, and Reimbursements. A red arrow points from the text 'Not sure which Expenditure Type to choose? Click this link to the Dept. of State website for more information.' to the 'Campaign Treasurer Handbook' link.

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.

How to File Financial Reports Online

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

Disposition of Funds	<p>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.</p> <p>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.</p>
Disposition of Funds to Future Campaign	<p>Funds transferred to an account for a future campaign.</p> <p>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.</p>
Disposition of Funds to Petition Verification	<p>Funds transferred to pay for previously unpaid petition verification fees.</p> <p>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.</p>
Disposition of Funds to Political Party	<p>Funds given to the political party that the candidate is a member of.</p> <p>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.</p>
Monetary	<p>General expenditure type used when a specific type does not apply.</p>
Petty Cash Spent	<p>Petty cash spent during a reporting period.</p> <p>Expenditures made from petty cash are not required to be reported individually.</p>
Petty Cash Withdrawn	<p>Petty cash withdrawn during a reporting period.</p> <p>Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.</p>
Refund	<p>A refund of money from a vendor or other source.</p> <p>Refunds must be entered as a negative amount.</p>
Reimbursements	<p>Compensation made to a person or group by a check drawn on the campaign account for expenses incurred in connection with campaign activities.</p>
Transfer to Office Account	<p>Funds transferred to an office account when the candidate has been elected.</p>

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.

Transaction Date Not In Selected Report Range

The transaction date you entered (08-04-2015) is not within the date range of the currently selected report. The date range for the report(s) listed below includes the date you entered. You can either...

- Select the correct reporting period from the list below and press the Select button.
- Press the Cancel button to return to the form if you wish to change the transaction date.

☐ 2015-8 from: 08/01/2015 to: 08/31/2015

Color legend:

Report is available

Amendment will be created

Select Cancel

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.

Transaction Date Not In Selected Report Range

The transaction date you entered (05-04-2015) is not within the date range of the currently selected report. The date range for the report(s) listed below includes the date you entered. You can either...

- Select the correct reporting period from the list below and press the Select button.
- Press the Cancel button to return to the form if you wish to change the transaction date.

☐ 2015-5 from: 05/01/2015 to: 05/31/2015

Color legend:

Report is available

Amendment will be created

Select Cancel

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.

Transaction Date Not In Selected Report Range

The transaction date you entered (03-04-2015) is not within the date range of the currently selected report. No report could be located that includes the date you provided. Please change the transaction date or contact our Campaign Finance Administrator for assistance.

Close

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.



Prepare Totals

NOTE: This is NOT your OFFICIAL report -- it is a PREVIEW ONLY.
After your review, you must use the
CREATE FINAL REPORT FOR REVIEW
button to generate your final report and then you must assign
your PINs to the report to officially file your report with our office.

Candidate : **Carolyn J. Casadonte (312)** Office : **County Commission, District 3**

Report Period **06/01/2015-06/30/2015** Due Date **7/10/2015**

Contributions **\$50.00** Expenditures **\$0.00**

Transfers **\$1,500.00** Distributions **\$0.00**

Click on the 'Prepare Totals' button below to prepare the report totals.

Once this is done, you can Preview the report from the report menu.

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:

Report (6/1/2015 - 6/30/2015) Preview is ready

NOTE: This is NOT your OFFICIAL report -- it is a PREVIEW ONLY.
You must still generate and submit your final report after you
complete your review.

Your output PDF file (./pdf_cfetraining/e60c312_6_dhc691sd359.pdf) has been produced and is available to be previewed.

To View this report, you will need Adobe Acrobat

You only need to install Adobe Acrobat one time. If you have not previously installed Adobe Acrobat, click here to download it

How to File Financial Reports Online

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.

The image shows three overlapping draft versions of financial reports. The top form is the 'CAMPAIGN TREASURER'S REPORT SUMMARY', the middle is 'CAMPAIGN TREASURER'S REPORT - ITEMIZED CONTRIBUTIONS', and the bottom is 'CAMPAIGN TREASURER'S REPORT - ITEMIZED EXPENDITURES'. Each form has a large 'DRAFT' watermark across it.

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**.

A green rectangular panel containing several buttons: 'Import Entries', 'Enter Contributions', 'Enter Transfers', 'Enter Expenditures', 'Enter Distributions', 'Preview', 'Create Final Report', and 'Export CSV'. The 'Preview' button is circled in red.

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.

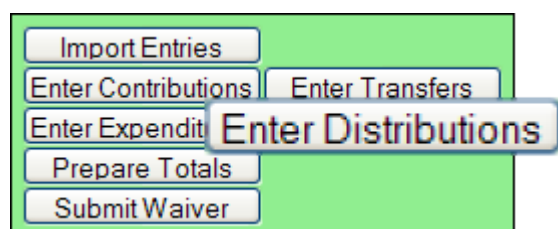
- **Prepaid Distribution**—Reserved for up-front, lump sum payments to be disbursed to different entities at a later date. (For example, payment to a media consultant who then makes disbursements to newspapers and television stations.) Related entries under **Enter Distributions** will be reported and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

Campaign Treasurer's Report - Itemized Distributions						
Election : County 2015 (2015-11-04) Report Date : 2015-6 (2015-06-01 - 2015-06-30) Add Distribution Return to Report List						
Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
				Total		\$0.00
Add Distribution Return to Report List						

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.

Enter the date the distribution occurred. This date does not have to be within the current reporting period.

Enter the amount and the purpose of the distribution. If the distribution is a contribution to a candidate, be sure to indicate the office they are running for.

If the distribution is related to a previously reported expenditure, enter:

- The year when the expenditure was reported.
- The Report Type from the first page of the report (example, M4).
- The Sequence Number (from the first column of the report's expenditures page).

Date: 10/1/2009

Date of item:

Vendor Name: Last First Middle
 Address 1:
 Address 2:
 City: ST: Zip:
 Amount \$:
 Purpose:
 Related Expenditures: Year Report Line

Enter last 1
 Type the pu
 For each dis
 Report, ent
 Number ass

[List Vendors](#)

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.

Campaign Treasurer's Report - Itemized Distributions							
Election : County 2015 (2015-11-04) Report Date : 2015-6 (2015-06-01 - 2015-06-30) Add Distribution Return to Report List							
	Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
Edit Delete	1	6/4/2015	Eric Wu Campaign Account 222 South Street Tallahassee, F 32432	Mailouts	2015~2015-6~2		\$500.00
						Total	\$500.00
Add Distribution Return to Report List							

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.

A screenshot of a menu with a green background. The menu contains several buttons: 'Import Entries', 'Enter Contributions', 'Enter Expenditures', 'Prepare Totals', and 'Submit Waiver'. The 'Enter Transfers' button is highlighted with a blue border and a white background, and it is positioned over the 'Enter Contributions' button.

Campaign Treasurer's Report - Itemized Fund Transfers							
Election : County 2015 (2015-11-04) Report Date : 2015-6 (2015-06-01 - 2015-06-30) Add Fund Transfer Return to Report List							
Seq Num	Date	Institution	Transfer Type	Nature of Account	Amend	Amount	
				Total		\$0.00	
Add Fund Transfer Return to Report List							

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

Date	10 / 1 / 2009	Date of item (mm/dd/yyyy)
Institution Name	<input type="text"/>	Enter institution name
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Transfer Type	To <input type="text"/>	Select the type that describes this transfer
Nature of Account	<input type="text"/>	Certificate of Deposit, Money Market, etc. //

[List Vendors](#)

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**

Current reporting period is shown in green.

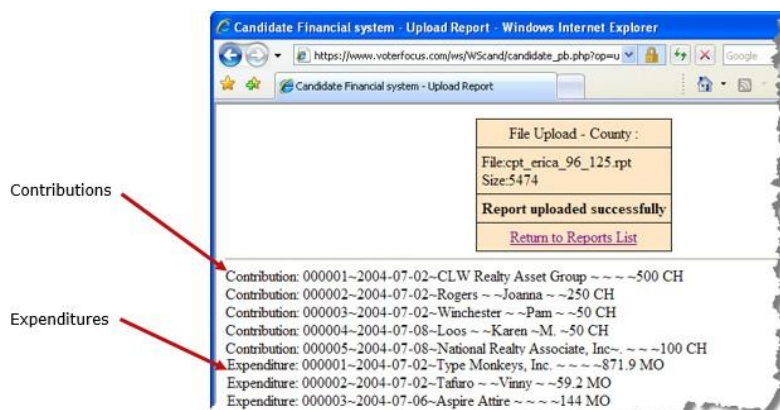
Candidate Reports					
Election : County 2015 (2015-11-04)					
Past Reporting Periods Current Reporting Periods Future Reporting Periods					
Rpt Date	Total Contrib	Total Exp	Status		
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 Item)	-	Submitted #1068116 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 Items)	\$1,000.00 (2 Items)	Not Filed Data Entry Started (1) distribution item(s)	Import Entries Enter Contributions Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Final Report For Review Export CSV	
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 Item)	-	Submitted #1073251 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions

Import Entries brings up the **Upload Report** page.

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.

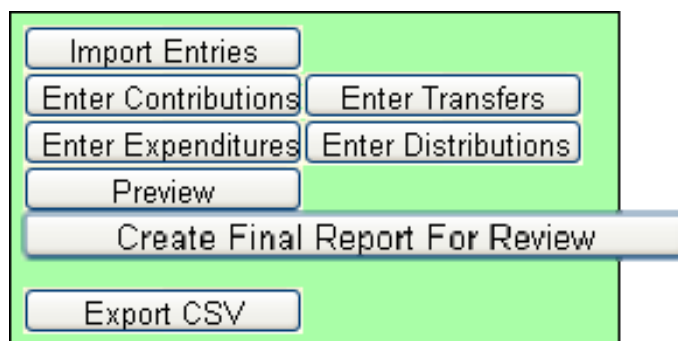
Submit a Report

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.



A screenshot of a web interface with a light green background. It contains several buttons arranged in a grid. The buttons are: 'Import Entries', 'Enter Contributions', 'Enter Transfers', 'Enter Expenditures', 'Enter Distributions', 'Preview', 'Create Final Report For Review' (which is highlighted with a blue border and a slight shadow), and 'Export CSV'.

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 provisions 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.

Create Final Report For Review

Cancel

- 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.

Report created for your final review.

Preview Report Created: 2015-07-6 10:26:09 (Eastern)

Scroll down to see the report

**This report has not yet been submitted to the Supervisor of Elections.
To submit the report, assign both PINs as described below.**

Reporting Period: 6 (6/1/2015 - 6/30/2015)

Electronic Signature PINs

To signify your approval of this report, enter your PIN in the appropriate field and click **Assign PIN**. Once both PINs have been assigned, the report will be submitted to the Supervisor of Elections.

If both parties are present, both PINs can be assigned now. Or you can assign your PIN now and the other party can enter theirs later during their own session.

If you do not want to assign a PIN at this time, click **Later**.

If the report needs modification, click **Undo Final Report**. This will unlock the report so you can make the necessary changes and recreate a new final report for PIN assignment and submission.

Candidate/Committee Electronic Signature PIN	As required in F.S. 106.0705(4), I, as candidate or political committee chair, certify that I have examined this report and it is true, correct, and complete.	<input type="text"/>
Treasurer Electronic Signature PIN	As required in F.S. 106.0705(4), I, as campaign treasurer for this candidate/committee, certify that I have examined this report and it is true, correct, and complete.	<input type="text"/>
	Click Assign PIN to assign the PIN you entered above to the report. When both PINs have been entered in the above fields, clicking Assign PIN submits the report to the Supervisor of Elections.	<input type="button" value="Assign PIN"/>
	Click Later if you want to come back later to assign a PIN. The report is now locked and cannot be modified.	<input type="button" value="Later"/>
	Click Undo Final Report to remove all PINs and unlock the report. This will allow you to make modifications to the report.	<input type="button" value="Undo Final Report"/>

CAMPAIGN TREASURER'S REPORT SUMMARY

<p>(1) <u>Carolyn J. Casadonte</u> Name</p> <p>(2) <u>1645 Harrington CT</u> Address (number and street)</p> <p><u>Palmetto, FL 32317</u> City, State, Zip Code</p>	<p style="text-align: center;">OFFICE USE ONLY</p> <p style="text-align: center;">ONLINE SUBMISSION [1088118]</p> <p>Submitted on: 6/4/2015 16:25:24 (eastern)</p>
---	--

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

Enter Candidate's PIN

Enter Treasurer's PIN

Then, click

Assign PIN

The screenshot shows a green-bordered form with three sections. The top section has a label 'Enter Candidate's PIN' with a red arrow pointing to a white input field containing four black dots. The middle section has a label 'Enter Treasurer's PIN' with a red arrow pointing to a white input field containing four black dots and a vertical cursor. The bottom section has a label 'Then, click' with a red arrow pointing to a grey button labeled 'Assign PIN'.

4.

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

Enter Candidate's
or
Treasurer's PIN

Then, click

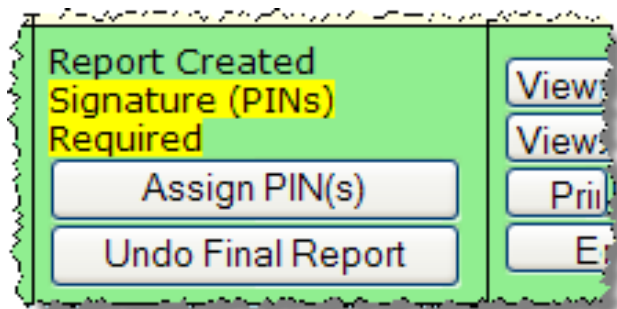
Assign PIN

Later

The screenshot shows a green-bordered form with three sections. The top section has a label 'Enter Candidate's or Treasurer's PIN' with a red arrow pointing to a white input field containing four yellow dots. The middle section has a label 'Then, click' with a red arrow pointing to a grey button labeled 'Assign PIN'. The bottom section has a grey button labeled 'Later'.

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.

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Name: Carolyn J. Casadonte
 (2) Address (number and street): 1645 Harrington Ct
Twinette, FL 32317
 City, State, Zip Code
☐ Check here if address has changed
 (3) ID Number: 312

(4) Check appropriate box(es):
☒ Candidate Office Sought: County Commission, District 3
☐ Political Committee (PC)
☐ Electioneering Communications Org. (ECO)
☐ Party Executive Committee (PET)
☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)
☐ Check here if PC or ECO has disbanded
☐ Check here if PET has disbanded
☐ Check here if no other IE or EC reports will be filed

(5) Report Identifier
 Cover Period: From 6/1/2015 To 6/30/2015
☒ Original ☐ Amendment ☐ Special Election

(6) Contributions This Report
 Cash: Checks \$ 150.00
 Loans \$ 0.00
 Total Monetary \$ 150.00
 In-Kind \$ 300.00

(7) Monetary Expenditures
 Total: \$ 300.00

(8) TOTAL Monetary Contributions To Date
 \$ 150.00

(9) TOTAL Monetary Expenditures To Date
 \$ 300.00

(10) Certification
 It is a first offense misdemeanor for any person to file a false or misleading report.
 I certify that I have examined this report and it is true, correct, and complete.
 (Type name) ☒ Individual only for IE, ECO, or Electioneering (only) ☐ Treasurer ☐ Deputy Treasurer ☐ Candidate
 Signature _____ Signature _____
 DS-DE 12 (Rev. 11/10)

CAMPAIGN TREASURER'S REPORT - ITEMIZED CONTRIBUTIONS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, First, Middle) Street Address & City, State, Zip Code	(8) Contribution Type	(9) Contribution Type	(10) In-Kind Description	(11) Amount
6/4/2015	1	Barber, Anna Lee 4400 N. 10th Ave. Phoenix, AZ 85018	C	C		\$150.00
6/2/2015	2	Barber, Anna Lee 4400 N. 10th Ave. Phoenix, AZ 85018	C	C		\$150.00

CAMPAIGN TREASURER'S REPORT - ITEMIZED EXPENDITURES

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amount
6/4/2015	1	Barber, Anna Lee 4400 N. 10th Ave. Phoenix, AZ 85018	Initiation Fee	NO	\$150.00
6/4/2015	2	Barber, Anna Lee 4400 N. 10th Ave. Phoenix, AZ 85018	Initiation Fee	NO	\$150.00

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amount
6/4/2015	1	Eric Wu Campaign Account 123 South Street Tallahassee, FL 32301	2015-2015-6-2		\$150.00

CAMPAIGN TREASURER'S REPORT - FUND TRANSFERS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/29/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Name of Financial Institution Street Address & City, State, Zip Code	(8) Transfer Type	(9) Nature of Account	(10) Amount
6/6/2015	1	Bank of America 123 South Street Tallahassee, FL 32301	TO	Money Market	\$1,100.00

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.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions	View Transfers
				View Expenditures	View Distributions
				Print	Amend
				Export CSV	

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.)

Reporting Group (Election/Committees)
Test Election 2012 (10/1/2012)

Print

Current reporting group: (Election/Committees): Test Election 2012 (10/1/2012)
(You can select another available reporting group from the above list.)

This web site lists candidates for county and local offices and committees/WACs. Candidates for federal, state and multi-county offices are reported on the Division of Elections of the Department of State Website.

Information contained within the reports has been generated by and is the sole responsibility of the reporting entity

Candidates

Candidate Name	Party	Monetary Contributions	In Kind Contributions	Total Expenditures & Distributions
Office: Clerk of Courts				
John Logan (Active-Qualified)	Details	\$12.00		
Karen Page (Active-Qualified)	Details	REP		
Digger Phelps (Active-Qualified)	Details	\$10.00		
Scotty Summers (Active-Qualified)	Details	REP		

Candidate selected here.

Election selected here.

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

Candidate: Carolyn J. Casadonte
Office: County Commission, District 3

Back Print Export All

List All Contributions and Expenditures

Show only financial reports (hides 000)

Available reports...

6	7/10/2015	Contact Information:
6	7/10/2015	1645 Harrington CT
7	8/10/2015	Suite C
		Pinellas, FL - 32247
		gymos@vrsystems.com

The newly received report is listed here.

The following financial reports are available:

Report	Monetary Contributions	In Kind Contributions	Expenditures and Distributions	Print Report
View Transactions				
6 (6/1/2015 - 6/30/2015)	\$150.00	\$200.00	\$1,000.00	Print
6 (6/1/2015 - 6/30/2015) Amended	\$125.00	\$300.00	\$500.00	Print
7 (7/1/2015 - 7/31/2015)	\$50.00	\$0.00	\$0.00	Print

Display list of all campaign transactions.

Candidate qualifying forms and miscellaneous documents

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

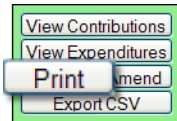
Contributions from persons with protected address status are not shown in reports. Instead, the notation ***Protected*** is shown in place of the address. The Campaign Financial Reporting system scans the county's voter registration database for voters with protected addresses and automatically redacts 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 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.

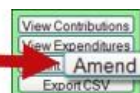
You can amend a report any time after you submit it. When the original report's status is *Submitted*, you can add new contributions and expenditures, but you cannot change data on the original report. To change original data, the original report's status must be *Received*.

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:

In the current reporting period (the green row), click



to bring up this page:

How to File Financial Reports Online

Then click **Create**.

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

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Not Filed Data Entry Started	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions

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.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Not Filed Data Entry Started	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions

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.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Submitted #1088118	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions

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

How to File Financial Reports Online

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:

In the past reporting period (the beige row), click **Unlock this report**.

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Received #1073251 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions

When the confirmation message appears, click **OK**.

Are you sure you wish to access a PAST reporting period?

OK

Cancel

The **Amend** button for the past reporting period becomes available.

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions

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

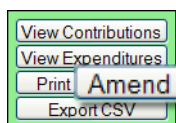
First, verify that the status of the original report is *Received*.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
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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.



Amend Report

Click **Create** to create an amended report for the 06/01/2015 - 06/30/2015 report. The amended report will appear in the report list below the original report.

Create

2. Next, click **Create**.

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

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$425.00 (3 items)	\$500.00 (1 item)	Not Filed Data Entry Started Amended	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1073251 Unlock this report	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions

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.

- 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									

- 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

- 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.

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**.

Amend Report - Enter changes to this item

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.	
		<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	
List Contributors			

How to File Financial Reports Online

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.

WAIVER OF REPORT (Section 106.07(7), F.S.) (PLEASE TYPE)		OFFICE USE ONLY
		ONLINE SUBMISSION [1014381]
Carolyn J. Casadonte		96
Candidate's Name (Last, Suffix, First, Middle) OR Political Committee, CCE or Party Name 1645 Harrington CT, Suite C Palmetto, FL 32314	Identification Number (Assigned by Division of Elections)	
Address (Number and Street)	County Commission District 4	
	Office Sought (Include District, Circuit or Group Number)	
City	State	Zip Code
<input checked="" type="checkbox"/> Candidate	<input type="checkbox"/> Committee of Continuous Existence	<input type="checkbox"/> Check box if address has changed since last report.
<input type="checkbox"/> Political Committee	<input type="checkbox"/> Party Executive Committee	<input type="checkbox"/> Check here if PC or CCE has DISBANDED and will no longer file reports.
TYPE OF REPORT (Check Appropriate Box)		
QUARTERLY REPORTS <input type="checkbox"/> January <input type="checkbox"/> April <input type="checkbox"/> July <input type="checkbox"/> October	PRIMARY ELECTION <input type="checkbox"/> 32nd day prior <input type="checkbox"/> 18th day prior <input type="checkbox"/> 4th day prior	GENERAL ELECTION <input type="checkbox"/> 48th day prior <input type="checkbox"/> 32nd day prior <input type="checkbox"/> 18th day prior <input type="checkbox"/> 4th day prior <input type="checkbox"/> TERMINATION REPORT <input type="checkbox"/> SPECIAL ELECTION
NOTIFICATION OF NO ACTIVITY IN CAMPAIGN ACCOUNT FOR THE REPORTING PERIOD OF X 7/1/2009 through 9/30/2009 (Q3)		
Signature		Date
SIGNATURES REQUIRED FOR: Candidates Candidate, Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.) Political Committees Chairman, Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.) Committees of Continuous Existence Treasurer (s. 106.04(4)(c), F.S.) Party Executive Committees Treasurer or Chairman (s. 106.29(2), F.S.)		
<small>In any reporting period when there has been no activity in the account (no funds expended or received) the filing of the required report is waived. However, the filing officer must be notified in writing on the prescribed reporting date that no report is being filed.</small>		

1. On the Report List, find the reporting period that you want to submit a waiver for.
2. Click **Create Waiver Report**.

Import Entries	
Enter Contributions	Enter Transfers
Enter Expenditures	Enter Distributions
Prepare Totals	
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

Unlock this report

button?

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 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Received #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions

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.

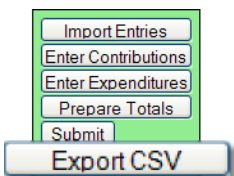
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
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For future reporting periods, you'll see the usual buttons for entering data.

2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Received #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV	View Transfers View Distributions
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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.

				Prepare Totals
				Create Waiver
				Import Entries
				Enter Contributions
				Enter Expenditures
				Prepare Totals
				Create Waiver
2015-Final (10/01/2015 - 10/31/2015) 11/10/2015	-	-	No Data Entered Unlock this report	

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

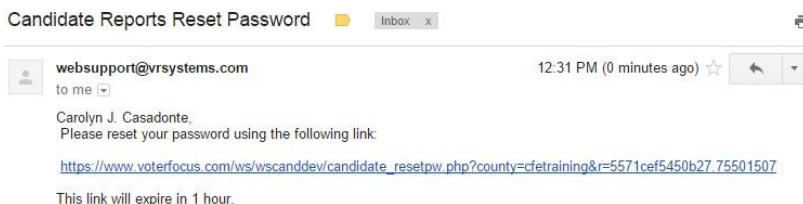
[Forgot Password?](#)

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)

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



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.

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

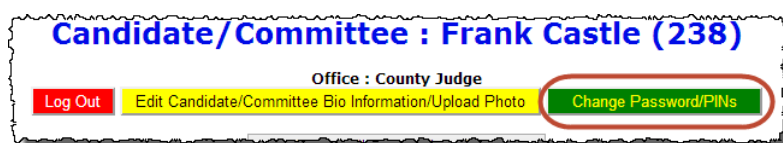
Change a Password or PINs

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:

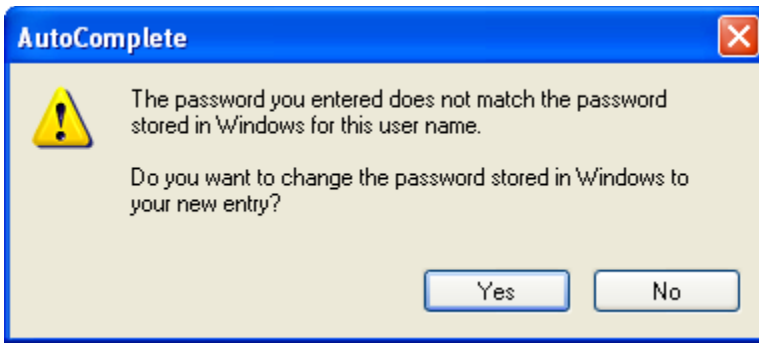
1. On the Report List, click **Change Password/PINs**.



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 [resetting a password](#). 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**.

