How to File Financial Reports Online
A HANDBOOK FOR CANDIDATES & COMMITTEES

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Supervisor of Elections
Duval County, FL
The Duval County Supervisor of Elections Office is pleased to provide a Financial Reporting System for candidates and committees to use for the reporting of contributions and expenditures. This system must be used to prepare your Campaign Treasurer’s Reports and file them electronically with our office. **Paper copies of the reports are no longer accepted or required to be sent to this office.** Your report is considered filed upon submitting it electronically and placing all required electronic signatures (PINS) on the report. The Financial Reporting System is very user friendly and we hope that you will find it helpful. After the report is electronically submitted and accepted by our office, the information will be available to the public on our website.

Contact information will be shown on the website for each candidate and committee. If you have a website, let us know so we can enter that into the reporting system.

If you need any assistance, we are happy to help you. Please call Lana Self at (904) 630-8010 or Brenda Byles at (904) 630-8004 if you have any questions.
ATTENTION CANDIDATES & CAMPAIGN TREASURERS

- MUST be filed MONTHLY until 60 days away from election
- MUST be filed electronically through the SOE website
- Please see the calendar of reporting dates for the election you are filed in
- Enter the due dates into a calendar system with reminders to avoid late reports
- Candidates and committee chairs are responsible for the timely filing of reports

Any report NOT filed no later than midnight on the last reporting date is subject to penalties* prescribed under Section 106.07, Florida Statutes

The fine is $50 per day for the first three days late and thereafter, $500 per day or $500 per day for each day late if the reporting period immediately precedes certain elections. The total of the fine cannot exceed 25% of the total contributions or expenditures, whichever is greater, for the period covered by the late report. The fine must be paid from the Candidate’s PERSONAL FUNDS (not campaign funds) F.S. 106.07 (8)(b)

REPORTING DATES CAN BE FOUND IN CANDIDATE HANDBOOK OR SOE WEBSITE

CANDIDATES: The last report that is filed is called the Termination Report. It is filed no later than 90 days after a candidate withdraws, is defeated, elected or qualifies unopposed. Candidates will receive an email as to when it will be due.

This document was prepared in part using material provided to Duval County by VR Systems Inc. Such material is confidential and a proprietary trade secret. The software is also a proprietary trade secret. Software and software documentation are therefore not subject to open disclosure under Florida Public Records laws.
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Financial Reporting Quick Reference

Logging in
- Go to duvalelections.com
- From side menu, select Candidates & Committees, then Candidate/committee Lists, Reports & Profiles
- Enter ID and Password, press, “login”
- Current reporting period is shaded green

Entering Contributions
- Select “Enter Contributions”
- Select “Add Contribution” link
- Enter date contribution was received by treasurer or campaign
- Contributor Name (if company, put company name in LAST NAME field)
- Address: this has to be a complete mailing address
- City, State and Zip, must be completed
- Contributor Type (see page 14):
  - Candidate deposited their own money: Choose “Candidate to Themselves” and Contribution Type is LOAN. This will allow the candidate to repay their loan to themselves before the end of campaign.
  - If money was a contribution from other sources, choose from drop-down list
  - Contribution Type: choose from drop-down list
- Once you have completed the form, press “Submit”

Once it is saved, you will get another blank form where you can add another entry. If you are done entering contributions, press “cancel” on bottom.

The program will take you to the itemized contributions screen which allows you to view what you have entered for each transaction. If everything looks correct and you are done entering contributions, press “Return to Report List” (main screen)

Entering Expenditures
- Select “Enter Expenditures”
- Select “Add Expenditure” link
- Enter date of expenditure
- Vendor Name (If company, put company name in LAST NAME field)
- Address: this has to be a complete mailing address, not a web address)
- City, State and Zip is required
- Purpose of expenditure:
  - Brief description
  - Expenditure Type (see page 17): choose from the drop-down list
- Once you have completed the form, press SUBMIT

Once it is saved, you will get another blank form where you can add another entry. If you are done entering expenditures, press “cancel” on bottom.

The program will take you to the itemized expenditures screen which allows you to view what you have entered for each transaction. If everything looks correct and you are done entering expenditures, press “Return to Report List” (main screen).

Waiver Report
- When there has been no activity during a reporting period, a Waiver Report is required.
- Use the “Create Waiver Report” button to generate the waiver report
Preview the Report
- Previewing a report does not submit the report to our office
- Select “Prepare Totals”
- Select “Prepare Totals” in next window
- Select “View/Print” (brings up a PDF of your report)
- Your report has DRAFT on it, but it also shows your entries

Submitting a Report
- Once you have prepared the totals and have reviewed your report and it is complete and correct
- Press “Create Final Report for Review” again
- Enter Candidate/Committee Electronic Signature PIN
- Enter Treasurer Electronic Signature PIN
- Press “Assign PIN” – submits report to elections office
- Once the elections office gets email that the report was submitted, it will be reviewed and accepted.
  - However, if the report needs to be amended, treasurer/candidate will be notified via email and the amended report must be submitted within seven days from notice.
  - If report is submitted before the due date and it needs amending, our office can reject the report. This makes it available to correct any items needing correction.

Amending a Report
- In the Reporting Main Screen, choose the reporting period that needs to be amended and Unlock the Report
- Select Amend
- A screen comes up that says “Amend Report”. Click the “Create” button
- When the report list reappears, look for the reporting period with “Amended” listed under the reporting date/covered period (left column)
- Choose “Enter Contribution” or “Enter Expenditure” depending on what needs to be corrected or added

To add a new item
- If you need to add a new item to the report select “Add Contribution” or “Add Expenditure,” depending on which box you are in
- Enter the information needed for the new item
- When finished, click “Submit”
- Add another item, amend an item on original report, or if finished, return to report list

To change an item on the original report
- To change an item on the original report, select “Amend Item from Orig. Report.”
- A box comes up listing the items on the report.
- Select the item you need to amend.
- To change an item, just make your changes in the appropriate fields.
- If you need to delete the item, remove the amount and place a “0” in the amount field.
- Click “Submit”
- Next page will show the deleted item and the added item or the original item and the corrected item. Do not delete any of the items!
- Select another item to make a change or return to Report List when you are done.
- Submit your amendment as you submit original reports.
NOTES:

- A loan made by the candidate to his/her campaign should be shown as “Candidate To Themselves” and “Loan.” Showing the contribution as a loan allows the candidate to pay themselves back before the end of the campaign.

- Contributions are considered received for reporting purposes when received by the candidate, campaign or deputy treasurer or an agent of the campaign.

- Online contributions are reported as a check. Date of receipt is when money is placed into bank account, not date transaction made by contributor.

- Contributions should show only one name. If check is from a joint account, list the contributor as the person signing the check. (Opinion DE 93-10)

- When a check is written to pay back all or part of a candidate loan, enter in contributions as a refund as a negative number. This is also done when refunding a contribution to a contributor.

- If the campaign receives a refund from a vendor, enter the check amount as a refund in expenditures as a negative number. This will deduct the amount from the amount of total expenditures.

- Occupation of contributor for contributions over $100 is required. If it is a business, please indicate nature of business.

- Occupation should be specific. Businessman/woman or business owner is not allowed. An amendment will be required.

- Retired or homemaker is fine for someone not currently employed.

- Expenditures on the report are reported with the date the check is written, not when it clears the bank.

- When making a change in a report and amending an item, you will have two entries representing the changed item. Do not delete either 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. (Its Amend column says Add.)
What’s shown in an online financial report?

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 will appear on the elections website and can be viewed by the public. Along with the financial reports, you have the option of providing a short description (or “bio”) of the candidate/committee and a photograph.

Here’s an example of a monthly report:

**First, there’s a summary page**

![Summary Page](image1)

Then, an itemized list of contributions

![Itemized Contributions](image2)

Next, a list of expenditures

![Expenditures](image3)
Then, a list of distributions

<table>
<thead>
<tr>
<th>Date</th>
<th>Full Name</th>
<th>Purpose</th>
<th>Related Expenditures</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/4/2013</td>
<td>Eric W. Campaign Accountant</td>
<td>2013-2014-6-C</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

And finally, a list of fund transfers

<table>
<thead>
<tr>
<th>Date</th>
<th>Name of Financial Institution</th>
<th>Nature of Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/6/2013</td>
<td>Southern Bank</td>
<td>Money Order</td>
<td>1,000.00</td>
</tr>
</tbody>
</table>
What do I need to create reports online?

- **A computer equipped with:**
  - An Internet connection.
  - A web browser configured to accept cookies and with pop-up blockers disabled. In this document, the examples shown use Internet Explorer.
  - 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:
    - a link in the Campaign Financial Reporting System (see page 20)
    - www.adobe.com
  - A printer, if you want a hard copy of the report for your records.

- **A candidate ID and password.**
  This will be provided to you by our office.
  Candidates need a new ID each time they run for office, even when they are running for reelection to the same office. Committees also need a new ID for each election.

  Committees of continuous existence typically are allowed to keep the same ID, but this varies from county to county. Some counties prefer to assign committees of continuous existence a new ID for each election.

  The password can be changed after you log in, if you wish.

- **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, if you wish. (See page 60 for instructions.)
How do I start?

Log into the Campaign Financial Reporting system like this:

1. Type this web address into your browser:
   

2. Press the Enter key on your keyboard or click the “go” icon in your web browser. You’ll then see the Candidate Log In page:

   Candidate Log In

   Enter your candidate ID and password here.

   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.

3. Click Login.

   The elections office requires that you change your password the first time you log in. After you click Login, you will see the Candidate Reset Password page:

   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.

   The password must be at least 8 characters—letters and/or numbers and is case-sensitive. Do not use common words or part of the user ID. Enter a new password in the fields and then click Reset Password. On the Candidate Log In page, re-enter your candidate ID and your new password and click Login again.

   It’s advised that you change your PIN numbers also.
What you see when you log in.

This is the main page of the Campaign Financial Reporting System. It shows the reporting periods for the campaign. We call this page the Report List.

Candidate/Committee: Carolyn J. Casadonte (312)

Office: County Commission, District 3

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

<table>
<thead>
<tr>
<th>Candidate Reports</th>
<th>Election: County 2015 (2015-11-04)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past Reporting Periods</td>
<td>Current Reporting Periods</td>
</tr>
<tr>
<td>Rpt Date</td>
<td>Total Contrib</td>
</tr>
<tr>
<td>----------</td>
<td>---------------</td>
</tr>
<tr>
<td>2015-5 (05/01/2015 - 05/31/2014) 6/3/2015</td>
<td>-</td>
</tr>
<tr>
<td>2015-6 (06/01/2015 - 06/30/2015) 7/10/2015</td>
<td>-</td>
</tr>
<tr>
<td>2015-7 (07/01/2015 - 07/31/2015) 8/10/2015</td>
<td>$50.00 (1 Item)</td>
</tr>
</tbody>
</table>

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 10 days away (that is, 9 or fewer days from today), you’ll see a message like this at the top of the page:

```markdown
**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 Info/Upload Photo  Change Password/PII

Export All Transactions CSV

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

<table>
<thead>
<tr>
<th>Candidate Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Election : County 2015 (2015-11-04)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reporting Periods</th>
<th>Current Reporting Periods</th>
<th>Future Reporting Periods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rpt Date</td>
<td>Total Contrib</td>
<td>Total Exp</td>
</tr>
<tr>
<td>2015-5 (05/01/2015 - 05/31/2015)</td>
<td>6/3/2015</td>
<td>No Data Entered</td>
</tr>
</tbody>
</table>

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

And the due/overdue report(s) will be highlighted as well.

After 180 days, overdue reports are no longer highlighted as late.
Let’s look at the current reporting period.

<table>
<thead>
<tr>
<th>Name of reporting period</th>
<th>Contributions so far</th>
<th>Expenditures so far</th>
<th>Command buttons for entering data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-5</td>
<td>$50.00</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Start and end dates of reporting period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Start and end dates of reporting period**

- **2015-5**: (05/01/2015 - 05/31/2015) 6/3/2015
- **2015-6**: (06/01/2015 - 06/30/2015) 7/10/2015
- **2015-7**: (07/01/2015 - 07/31/2015) 8/10/2015

**Date when report is due**

- **2015-5**: 6/3/2015
- **2015-6**: 7/10/2015
- **2015-7**: 8/10/2015

**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.

We’ll look at these more closely on the next page.
About those command buttons...

If you use campaign finance reporting software like Campaign ToolBox™, you can import contributions and expenditures directly from that application. Page 30 explains how.

Submit your report to the elections office.

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.

To manually enter contributions and expenditures, click here.

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

Click here to manually enter fund transfers and distributions.
How do I view and maintain contributions?

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

- **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.
- **Add Contribution** shows 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.
Adding a new contribution is easy.

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.
<table>
<thead>
<tr>
<th>Contributor Type</th>
<th>Abbreviation on Report</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>Committee</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>Political Party</td>
<td>P</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>O</td>
<td></td>
</tr>
<tr>
<td>Electioneering Communications Organization</td>
<td>E</td>
<td></td>
</tr>
<tr>
<td>Political Committee (Federal or State)</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>Candidate to Themselves</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td><strong>Contribution Type</strong></td>
<td><strong>Abbreviation on Report</strong></td>
<td><strong>What it Means</strong></td>
</tr>
<tr>
<td>Cash</td>
<td>CA</td>
<td>Cash or cashier’s check</td>
</tr>
<tr>
<td>Check</td>
<td>CH</td>
<td>Traditional paper check, wire transfer, PayPal, credit card, or another type of electronic funds transfer (Enter the total amount of the contribution in Contributions and enter fees in Expenditures)</td>
</tr>
<tr>
<td>In-Kind</td>
<td>IK</td>
<td>An item of value other than money or volunteer services.</td>
</tr>
<tr>
<td><strong>In-kind Description</strong>: Enter a specific description of the in-kind contribution. Example: Food and beverage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest</td>
<td>IN</td>
<td>Money earned on campaign or interest-bearing accounts</td>
</tr>
<tr>
<td>Loan – Use this when candidate loans money to campaign</td>
<td>LO</td>
<td>Money loaned to the campaign rather than given outright</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>DU</td>
<td>Membership dues regardless of the form (cash, check, etc.)</td>
</tr>
<tr>
<td>Refund (A refund of a contribution is not an expenditure. (See Opinion 94-13)</td>
<td>RE</td>
<td>Bad checks or contributions returned (in whole or in part) to the contributor. This includes repayment of loan to candidate. <strong>Refunds must be entered as a negative amount.</strong></td>
</tr>
<tr>
<td>Money Order</td>
<td>MO</td>
<td>Contribution made by money order</td>
</tr>
<tr>
<td>Carry Over Funds from Previous Campaign</td>
<td>CO</td>
<td>Only Candidates may use this</td>
</tr>
<tr>
<td>Multiple Uniform Contributions</td>
<td>MU</td>
<td>Only Political Committees may use this</td>
</tr>
</tbody>
</table>
Adding expenditures is a similar process.

Click **Enter Expenditures** to bring up a list of the expenditures recorded so far:

<table>
<thead>
<tr>
<th>Seq Num</th>
<th>Date</th>
<th>Vendor</th>
<th>Purpose</th>
<th>Expenditure Type</th>
<th>Amend</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>1</td>
<td>6/4/2015 Davis Communications</td>
<td>Retainer for advertising.</td>
<td>Monetary</td>
<td></td>
<td>$500.00</td>
</tr>
</tbody>
</table>

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

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

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

Date: 5/22/2009
Vendor Last Name: Last
First
Middle
Address 1: 
Address 2: 
City: 
State: 
Zip: 
Amount $: 
Purpose: 
Expenditure Type: Monetary

Date of item (mm/dd/yyyy)
Enter last name or company name if a business
Type the purpose of the expenditure.

Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

Submit Cancel

Takes you back to the Report List.
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.

---

**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.

---

Not sure which **Expenditure Type** to choose? Click this link to the Dept. of State website for more information.

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 right now.
## EXPENDITURE TYPE

<table>
<thead>
<tr>
<th>Expenditure Type</th>
<th>Abbreviation on Report</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monetary</td>
<td>MO</td>
<td>General expenditure type used when a specific type does not apply. This includes bank charges and any fines or fees.</td>
</tr>
<tr>
<td>Petty Cash Withdrawn</td>
<td>PW</td>
<td>Petty cash withdrawn during a reporting period. Petty cash expenditures are realized when the funds are withdrawn for petty cash. This amount will be included in the expenditure totals for the reporting period.</td>
</tr>
<tr>
<td>Petty Cash Spent</td>
<td>PS</td>
<td>Petty cash spent during a reporting period. Expenditures made from petty cash are not required to be reported individually. This amount is NOT included in the expenditure totals for the reporting period; list the lump sum of petty cash spent for the current reporting period for information purposes only.</td>
</tr>
<tr>
<td>Refund (A refund from a vendor is not a contribution)</td>
<td>RE</td>
<td>A refund of money from a vendor for overpayment of services rendered or refund from other source. <strong>Refunds must be entered as a negative amount.</strong> (Returned check fee is a monetary expenditure, not a refund)</td>
</tr>
<tr>
<td>Disposition of Funds</td>
<td>DI</td>
<td>Pro-rata refunds to contributors, repayment of loan to candidate, donations to charitable organizations, donations to the State general revenue fund, or the return of matching funds to the State. <strong>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.</strong></td>
</tr>
<tr>
<td>Disposition of Funds to Future Campaign</td>
<td>DF</td>
<td>Used on Termination Report only (state candidates only (F.S. 106.141(6)(b)))</td>
</tr>
<tr>
<td>Disposition of Funds to Political Party</td>
<td>DP</td>
<td>Used on Termination Report only (state candidates only, F.S. 106.141(4)(a))</td>
</tr>
<tr>
<td>Disposition of Funds to Petition Verification</td>
<td>DV</td>
<td>Used on Termination Report only</td>
</tr>
<tr>
<td>Reimbursement</td>
<td>RM</td>
<td>Used when making a reimbursement. <strong>You must also do a DISTRIBUTION if you reimburse someone. The distribution will show WHY you are reimbursing the person – where did they spend their money thereby causing you to have to reimburse them</strong></td>
</tr>
<tr>
<td>Transfer to Office Account</td>
<td>TO</td>
<td>Funds transferred to an office account when the candidate has been elected.</td>
</tr>
</tbody>
</table>
A few notes about adding contributions and expenditures...

If you enter a contribution or expenditure outside of the range of the reporting period you are working with, they 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.

![Select or Cancel options]

Click the report that you would normally have filled 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.

![Select or Cancel options]

Click the report that you would normally have filled 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 on, 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 button]

Click **Close** and then either change the transaction date or contact your county Campaign Finance Administrator for assistance.
Want to see how the report is adding up? Just do a preview.

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. A report can be changed only if it is before the due date and the Campaign Finance Administrator rejects the report. It can then be resubmitted.

**Previewing a report DOES NOT submit the report to the Supervisor.**

To preview your report so far:

Click to bring up this 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.*

Click **Prepare Totals** to total the contributions and expenditures for this reporting period. You’ll be returned to the Report List, which now has a banner like this:
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 bring up a PDF of your report.
On the Report List, notice that the Prepare Totals button is now labeled Preview. You can click Preview at any time you want to look at the report. If transactions are added, the button label will switch back to Prepare Totals, which means you need to total the new transactions into the report before you can preview it again.

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

Forgot to add a contribution or expenditure? That’s OK: You can continue to add them after doing the preview.

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.

On the Report List, notice that the Prepare Totals button is now labeled Preview.
How do I 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:

Click **Import Entries** to bring up a page with describing the requirements for a distribution transaction.

Click **Proceed with Distribution** to see this page:

![Campaign Treasurer's Report - Itemized Distributions](image)

Click **Add Distribution** to bring up the form for entering distributions.

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).
When you’ve completed the form, click **Submit** to save the information. After the distribution is saved, you’ll get another blank distribution form.

Click **Cancel** when you’ve saved the last distribution you have right now. You’ll see the distributions you added highlighted in yellow, as in the example below.

### REIMBURSEMENT EXPENDITURES/DISTRIBUTIONS

Procedures for reporting - Additional information.

When the campaign treasurer issues a campaign check to an individual who has made authorized purchases on behalf of the campaign using PERSONAL funds, it is necessary to record the expenditure as an **RM** and create a DISTRIBUTION page (DS-DE 14A).

The DISTRIBUTION will contain the itemized list of vendors who were paid with personal funds. The total of those items must equal the amount that was reported on the original expenditure line.

The next three form pages add up to $250.00 and that total appears on Expenditures, Seq. Num. 1:
<table>
<thead>
<tr>
<th>Date</th>
<th>5/1/2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name</td>
<td>ABC Printing</td>
</tr>
<tr>
<td>Address 1</td>
<td>5 Main St.</td>
</tr>
<tr>
<td>City</td>
<td>Jacksonville</td>
</tr>
<tr>
<td>Amount $</td>
<td>100.00</td>
</tr>
<tr>
<td>Purpose</td>
<td>Fliers and campaign signs</td>
</tr>
<tr>
<td>Related Expenditures</td>
<td>Year 2014 Report M7 Line 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>6/1/2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name</td>
<td>Downtown Food Truck</td>
</tr>
<tr>
<td>Address 1</td>
<td>Main Street at Ocean</td>
</tr>
<tr>
<td>Address 2</td>
<td>10 Main St.</td>
</tr>
<tr>
<td>City</td>
<td>Jacksonville</td>
</tr>
<tr>
<td>Amount $</td>
<td>100.00</td>
</tr>
<tr>
<td>Purpose</td>
<td>Refreshes for meeting</td>
</tr>
<tr>
<td>Related Expenditures</td>
<td>Year 2014 Report M7 Line 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>7/3/2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name</td>
<td>USA Supply store</td>
</tr>
<tr>
<td>Address 1</td>
<td>45 Forsyth St</td>
</tr>
<tr>
<td>City</td>
<td>Jacksonville</td>
</tr>
<tr>
<td>Amount $</td>
<td>50.00</td>
</tr>
<tr>
<td>Purpose</td>
<td>Printer ink</td>
</tr>
<tr>
<td>Related Expenditures</td>
<td>Year 2014 Report M7 Line 1</td>
</tr>
</tbody>
</table>
The next form page adds up to $50.00 and that total appears on Expenditures, Seq. Num. 2:

This is what the completed distribution page will look like:
The page in the final submitted report (pdf) will be entitled Itemized Distributions (Form DS-DE 14A):

<table>
<thead>
<tr>
<th>Date</th>
<th>Full Name</th>
<th>Purpose</th>
<th>Related Expenditures</th>
<th>Amendment</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/1/2014</td>
<td>ABC Printing, 5 Main St. Jacksonville, FL 32202</td>
<td>fliers and campaign signs</td>
<td>2014-M7-1</td>
<td></td>
<td>$100.00</td>
</tr>
<tr>
<td>6/1/2014</td>
<td>Downtown Food Truck, Main Street at Ocean 10 Main St. Jacksonville, FL 32202</td>
<td>refreshments for meeting</td>
<td>2014-M7-1</td>
<td></td>
<td>$100.00</td>
</tr>
<tr>
<td>7/3/2014</td>
<td>USA Supply store, 47 Pershing St. Jacksonville, FL 32202</td>
<td>printer ink</td>
<td>2014-M7-1</td>
<td></td>
<td>$50.00</td>
</tr>
<tr>
<td>7/1/2014</td>
<td>Michael's, 12025 San Jose Jacksonville, FL 32221</td>
<td>decoration and balloons</td>
<td>2014-M7-2</td>
<td></td>
<td>$50.00</td>
</tr>
</tbody>
</table>
What about fund transfers?

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.

Click to bring up this page:

Click Add Fund Transfer to bring up the form for entering transfers.
Enter the financial institution where the account is held.

<table>
<thead>
<tr>
<th>Date</th>
<th>Date of item (mm/dd/yyyy)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Name</td>
<td>Enter institution name</td>
</tr>
<tr>
<td>Address 1</td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>ST</td>
</tr>
<tr>
<td>Amount $</td>
<td></td>
</tr>
<tr>
<td>Transfer Type</td>
<td>To</td>
</tr>
</tbody>
</table>

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

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

When you've completed the form, click **Submit** to save the information. After the transfer is saved, you'll get another blank transfer form.

Click **Cancel** when you've saved the last transfer you have right now. Transfers are not shown on the Reports List because the funds have simply been moved within the campaign or committee, rather than expended or distributed elsewhere.
How do I import data from my campaign application?

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.

<table>
<thead>
<tr>
<th>Import File Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>The system can import any file that meets the Division of Elections Campaign Finance Reporting File Specifications:</td>
</tr>
<tr>
<td>Dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/</td>
</tr>
<tr>
<td>For a list of State-approved software vendors for electronic filing, see:</td>
</tr>
<tr>
<td>Dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/vendors/</td>
</tr>
</tbody>
</table>

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.
**To import data for the current reporting period:**

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.

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

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

<table>
<thead>
<tr>
<th>Rpt Date</th>
<th>Total Contrib</th>
<th>Total Exp</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-5</td>
<td>$500.00 (1 item)</td>
<td>-</td>
<td>Submitted</td>
</tr>
<tr>
<td>2015-6</td>
<td>$450.00 (3 items)</td>
<td>$1,000.00 (2 items)</td>
<td>Partially Submitted</td>
</tr>
<tr>
<td>2015-7</td>
<td>$50.00 (1 item)</td>
<td>-</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

**Import Entries** brings up the **Upload Report** page.
On the **Upload Report** page, click **Browse** and find the file you want to import. Then click **Upload Report**.

You’ll see a display of the transactions imported from the file, as in this example:

**To import data for a past reporting period:**
If you’ve 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 do an Import Entries command, following the instructions beginning on page 31.

**To import data for a future reporting period:**
Unlock the reporting period and do an Import Entries command, following the instructions beginning on page 3030.
Finished entering all data? Then submit the 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 have done this, the report cannot be changed, although it can be amended. We’ll look at amendments on page 42.
Duval County requires paper reports

To finalize the report:

Click

<table>
<thead>
<tr>
<th>Import Entries</th>
<th>Enter Contributions</th>
<th>Enter Transfers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Expenditures</td>
<td>Enter Distributions</td>
<td>Preview</td>
</tr>
</tbody>
</table>

Create Final Report For Review

Candidate: Carolyn J. Casadonte (312) Office: County Commissioner, 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.

Are your entries for this reporting period finished?

If not, click Cancel.
If you are ready to file, click Create Final Report For Review.
Clicking Create Final Report For Review brings up the Electronic Signature PINs page with a reminder that the report has not yet been submitted...

...followed by an online view of the report.
On the PINs page, you have these options:

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

- Enter just one of the PINs and click **Later**. This will return you to the report list.

[Diagram showing PIN entry fields and assignment buttons]
The message **Signature (PINs) Required** will appear in the report’s **Status** column and the report will be locked, which means no changes can be made.

When the report is ready to be signed with the other PIN, click **Assign PIN(s)** to bring up the PIN page again.

Enter the missing PIN and click **Assign PIN** to submit the report to the Supervisor of Elections.

- If you want to remove the PINs and unlock the report so you can make changes, click **Undo Final Report**.
Let’s look at 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.
When will my report appear on the elections website?

Once the Candidate and Treasurer PINs are assigned, an email will be sent to the candidate office letting them know of the submission. The report status will show **Submitted**. Your report will be reviewed, if possible, and released to the public. Once the report is released, the status will show **Received**, and the report is available on the website.

To get to your candidate page, website visitors select your name from the list of candidates running in a selected election.

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 bring up a list of all transactions reported so far grouped by type.

Contributions from persons with protected-address status are not shown in reports. Instead, the notation ***Protected*** will be seen in place of the address. The address must be correctly entered to show as protected. 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.

**NOTE:** If you believe that a contributor has / or should have a protected address (ie., law enforcement, fire department, judicial, state attorney office related), the contributor may list a business address or P.O. Box as an alternative address. You may not “manually” protect the address in this way:

```
Name
Protected
Jacksonville, FL
```

An address is always required. Entering data in this way may result in an audit notification.
How do I save a copy of the report on my computer?

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 on your local computer, just save the PDF to a folder on your computer or network.

To save copy of the report to your computer:

Click [PDF icon] to display a PDF of the report in Acrobat Reader.

Click [Save button]. 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.
What about changing a report that’s already been filed?

After a report has been 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 checkmark in the Amendment box.

The Amendment box is automatically checked when you create an amended report.

You can amend a report any time after you submit it and it has been received. A report submitted prior to the due date may be rejected by SOE at the request of the candidate / treasurer in order to make corrections, hence avoiding the amendment procedure.

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 following the instructions beginning on page 44.

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:

Then click Create.
When the Report List reappears, notice that there’s now a new row for the current reporting period.

To create an amended report, you can:

- Manually enter new contributions (page 13) and expenditures (page 15).
- Import new contributions or expenditures (page 31).
- Change or delete items listed on the original report (page 46).

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 (page 19) and submit it to the elections office (page 33). You’ll see a new confirmation number for the amendment.

If you need to change a report after submitting the amendment, please call our office.
To create an amendment to a report in a past reporting period:

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

When the confirmation message appears, click OK.

The Amend button for the past reporting period becomes available.

Click “Create”

**Amend Report**

Click Create to create an amended report for the 06/22/2013 - 06/23/2013 report. The amended report will appear in the report list below the original report.
A new row appears for the amended report. You will need to click **Unlock this report** once again.

Once the amended report is unlocked, you will be able to use the buttons on the right to enter the new data just as you did on the original report.

When you are finished entering data, preview the report and submit to our office.
How do I change or delete an item on the original report?

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

![Report status image]

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

**To change a contribution or expenditure:**

In the current reporting period (the green row), click to bring up this page:

![Amend Report page]

Then click **Create**.

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

![Candidate Reports table]

Enter the new data using these buttons, just like you did on the original report.
On the next page, click **Amend Item from Orig Report** to bring up a list of items (for example, contributions) reported in the current month:

To change an item, highlight it.

Then click **Amend Item**.

Highlight the item you want to change and click **Amend Item** to bring up the detail page for the item.
Type the changes where they are needed. If you want to delete the contribution or expenditure, simply zero-out the Amount field. When you’ve finished, 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.

On the next page, 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. (Its Amend column says Add.)

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

This completes the change to the original item. From here, you can change another item, add a new item, or return to the Report List. You must submit report by same procedures appearing on pages 34-38.

NOTE: Do not delete any entries here. Both items are needed to reflect the desired changes.
Oops! I didn’t mean to create an amended report!

That sometimes happens.

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 have 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.
What if I don’t have any contributions or expenditures for the period?

You must submit a Waiver of Report.

A waiver is a one-page report that you fill out and submit to the elections office.

Note: The Create Waiver Report button will not display on the candidate login screen for committees that are set up as Type - Electioneering Communication.

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

Click to bring up 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 will no longer be generated when clicking Create Final Report for Review with no contributions or expenditures applied.

On the next page, click Create Final Report For Review to bring up the Electronic Signature PINs page with a reminder that the report has not yet been submitted.

Enter both PINs in the spaces provided and click Assign PIN to submit the waiver to the Supervisor of Elections.
Why are some reports locked?

Have you noticed that reports for past and future reporting periods have an **Unlock this report** button?

These buttons prevent you from accidentally entering data for the current reporting period into 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 get command buttons for amending the report.

And for future reporting periods, you’ll see the usual buttons for entering data.
How do I export data to a spreadsheet?

The system has two ways to export your financial data to a Microsoft Excel comma-separated values (.CSV) file:

- Collects all data for the selected report.
- Collects all data from all reports in this 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, if you like.

**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)
What reporting is required at campaign end?

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 also 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 2015-Final, like the example here.

When it’s time to file the termination report, its row will turn green.

To file this report, you will need to 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. When you enter this expenditure, be sure to select Disposition of Funds for the Expenditure type.

Campaigns sometimes confuse Disposition of Funds and Enter Distributions. Remember that Disposition of Funds is a type of expenditure, whereas a distribution is a type of transaction referring back to a previously recorded expense.
When you return to the list of expenditures for the termination report, you will see the item listed, but the amount will not be reflected in the total expenditures for the period. Nor will the amount be included on the Report List—in the **Total Exp** column—although it will be counted as an “item.” This design is in accordance with Division of Elections requirements.

Preview the report and submit it as you have previous reports for the campaign. When you look at the report, notice that the Disposition of Funds amount is not reflected in box 7 of the Report Summary page.

But the amount will be included in box 10 of the Summary Report.

And it will appear on the Itemized Expenditure page with an expenditure type of DI.
How do I enter a photo and biographical info?

You can place a JPEG file, such as a photo, and descriptive text on the page that voters see when they visit the Campaign Financial Reporting system.

A photo and text about the candidate or committee are nice to have, but they are not required. If you don’t provide them, here is what voters will see:

The item in the photo area need not be a photograph. Committees might prefer to show their logo instead. But the file placed in this area must be a JPEG file. That is, the file’s 3-character file extension must be .JPG.

The system won’t accept a JPEG file that’s larger than 500 KB. It’s best to use an even smaller file if you can, because smaller files display more quickly to website visitors than large ones, especially if a visitor has a slow Internet connection.

**Note** Images with large dimensions (that is, large pixel sizes) might not display properly in certain older browsers.
To enter a photo:

On the main page, click the yellow button.

to bring up the Candidate/Committee Bio page:

Click **Browse** and navigate to the JPEG file you want to use. Then click **Upload Photo**.
When the file has copied to the system, you’ll see this message along with the photo file:

![File Upload - County:](image)

Click [Return to Main Menu](#) to return to the main page of the system.

**To enter candidate or committee text:**

On the main page, click the yellow button.

![Candidate/Committee : Carolyn J. Casadonte (96)](image)

Click Log Out to bring up the Candidate/Committee Bio page:

![Edit Candidate/Committee Bio Information/Upload Photo](image)

In the **Candidate/Committee Biographical Information** pane, type the information you want to display to voters. You can enter up to 5,000 characters. The system will show
you—in the **Characters** box—how many characters you have typed so far. When you are finished, click **Update**.

![Image of a text box with character count]

Type the biographical data here.

The system will show you how many characters you’ve already typed, so you’ll know when you’re reaching the limit.

When finished, click **Update**.

![Image of a text box with character count]

**Note** When a candidate updates their bio for the first time, they will need to remove any html elements that might have been entered before the change. If no html elements were added then updates will happen as normal.

If you ever want to change the photo or bio, just return to the Candidate/Committee Bio page and upload a different photo or edit the bio text.

To see how your photo and bio appear to voters, enter this address in your web browser, replacing `<county>` with your county name:

```
```

You will not see your photo and bio immediately. Our office reserve the right to review your information before it is released to the public on their website.
What if I forgot my password?

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

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

An email similar to the one below will be sent to the email address associated with your account.

Click the link provided in the email.

If for some reason there is not an email address associated with your Candidate ID, you’ll need to contact the Supervisor of Elections office.

On the Candidate Reset Password page:

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.

The password can be up to 12 characters—letters and/or numbers—and is case-sensitive.

Then click the **Reset Password** button and proceed back to the Log In page.
How do I change my password or PINs?

You can change the password assigned to you by the elections office, if you like. 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.

To change your password:

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

In the **Enter Old Finance System Access Password** field, enter your current password. You need to do this even if you don’t want to change the password, but only want to change one or both PINs.

If you want 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.

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.

Click **Change Password/PINs** when you are finished.
From now on, you will log on with your new password. Keep in mind: if you set up the Candidate Log In page to automatically fill in your password, you will need to 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, follow the instructions on page 59. If you forget your PINs, contact the elections office. They will be able to retrieve them for you.
Don’t forget to log out!

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.

To log out of the system:

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