Campaign Finance e-Filing User Guide

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Getting Started

1) You will need a login to access the Campaign Finance e-Filing system. In order to request one, you should be a candidate, a registered agent for a candidate committee or a registered agent for a political/issue committee.

2) You will need to contact the City Clerk's Office to request a login to the system. We will require your email address, full name and the candidate committee or political/issue committee with which you are associated if you are not a candidate.

3) Once we have your information, we will send you an email with a link used to activated your account and set your initial password. Be sure to allow the email address clerkexec@springsgov.com through your SPAM filter. All notification emails from the e-Filing system will originate from this email address.

This message was sent with Low importance.

From: City Clerk Notifications [clerkexec@springsgov.com]   Sent: Tue 1/4/2011 7:15 PM
To: Johnson, Blain
Cc:
Subject: Campaign Finance Email Verification

*** AUTOMATED MESSAGE -- DO NOT REPLY ***

This email contains a link to activate your Login for the Campaign Finance website for the City of Colorado Springs. Please click on the link below and follow the instructions to set your initial password.

If you have any questions, please contact the City Clerk's Office - (719) 385-5124

Click this activation link: http://www.springsgov.com/units/cityclerk/fcpa/VerifyEmail.aspx? ID=1&Key=████████████████████████████
For instructions on how to use this web application, download the Campaign Finance e-Filing User Guide

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System Requirements

4) The recommended configuration of the PC with which you access the e-Filing application is:

- Computer monitor with resolution of 1024x768 or greater

- Internet Explorer version 6 or higher

- Adobe Reader version 7 or higher or equivalent PDF viewer (e.g. Foxit Reader)

- Printer for printing completed forms

Setting Your Password

5)   When you click on the activation link, the *Email Verification* page will load. You can now type in a password that you will use to access the e-Filing system. Once you have typed in your password and confirmed it in the second box, click the **Change Password** button.

Home >> Email Verification

Access to the Campaign Finance application is restricted to authorized users only.

You will be responsible for any use of your password and for maintaining the confidentiality of your password. You are solely responsible for all activities that occur in connection with the use of your password. Accordingly, you should choose your password wisely as well as take steps to protect the confidentiality of your password. Notify the City Clerk's Office at (719) 385-5124 immediately if you become aware of any disclosure, loss, theft or unauthorized use of your password.

Your email address: **bajohnson@springsgov.com**

Please enter your new password to access the Campaign Finance application:

[••••••••]   (20 characters maximum)

Please confirm password:

[••••••••]

[Change Password]

6)   You should see confirmation that your password has been set and your login activated. You will also receive an email confirmation that your login has been activated. This email will also contain a link directly to the e-Filing application. You may want to save this email for future reference.

Home >> Email Verification

Access to the Campaign Finance application is restricted to authorized users only.

You will be responsible for any use of your password and for maintaining the confidentiality of your password. You are solely responsible for all activities that occur in connection with the use of your password. Accordingly, you should choose your password wisely as well as take steps to protect the confidentiality of your password. Notify the City Clerk's Office at (719) 385-5124 immediately if you become aware of any disclosure, loss, theft or unauthorized use of your password.

Your email address: **bajohnson@springsgov.com**

You have successfully set your password and activated your login for the Campaign Finance website. A confirmation email has also been sent to your email address with a link to the Campaign Finance website.

Proceed to Campaign Finance Login

Logging In

7)   At the *Login* page, type your user name (email address) and password, and then click **Login**.

Login

Access to the Campaign Finance application is restricted to authorized users only.

User Name: bajohnson@springsgov.com
Password: ••••
[Login]

8)   Based on the candidates or committees to whom you are associated, the next screen may differ slightly. Select the election and candidate/committee for which you are electronically filing. In most cases, you will only have one selection available to you.

Home >> Elections   **Log out**

Select the Election and Candidate/Committee for which you wish to submit Campaign Finance forms

	Election	Type	Candidate/Committee	Race
Select	4/5/2011	Municipal Election	Blain Johnson	Council At-Large

Campaign Filings

9)   On the *Filings* page, you have three options:
   A. Start a New Filing
   B. Make changes to an unfinished filing
   C. View/Amend an old filing

Home >> Elections >> Filings   **Log out**

Current Election: **April 5, 2011 Municipal Election**
Current Candidate/Committee: **Blain Johnson**
Current Race: **Council At-Large**

[Start New Filing] for Campaign Finance Deadline [2/7/2011 ▾]   ←———— Ⓐ

Unfinished Campaign Finance filings

			Date Created	Date Last Changed
Update	Submit	Delete	1/6/2011	1/6/2011

←———— Ⓑ

Previously submitted filings for this Candidate/Committee in this Election

			Date	e-Filed
View	Amend	Get Signable	1/3/2011	☑

←———— Ⓒ

Starting a New Filing

10)   To start a new filing, select the appropriate filing deadline for which you are filing and then click **Start New Filing**.

| Start New Filing | for Campaign Finance Deadline 2/7/2011 ▼ |

11)   You will see a list of available forms that can be electronically filed. Click **Add** next to the form you would like to add to your filing.

Home >> Elections >> Filings >> Filing Details   Log out

Current Election: **April 5, 2011 Municipal Election**
Current Candidate/Committee: **Blain Johnson**
Current Race: **Council At-Large**
Current Filing Deadline: **2/7/2011**

| Finished / Back to Filings | When you have finished all forms you believe necessary for this filing.

Current Forms for this Filing
No Forms for this Filing Yet

Available Forms to add to this Filing
Form Description
Add	Detailed Summary Report of Contributions and Expenditures
Add	Candidate Committee Statement of Organization
Add	Personal Financial Disclosure Statement
Add	Candidate Committee Funds Transfer Form
Add	Candidate Itemized Expenditures - $20.00 or More
Add	Candidate Itemized Contributions - $20.00 or More
Add	Candidate Statement of Contributions in Kind
Add	Candidate Statement of No Contributions or Expenditures
Add	LOANS - Loans Owed by the Candidate Committee
Add	Candidate Statement of Off-Set to Expenditures
Add	Statement of Personal Expenditures by a Candidate
Add	Biographical Information

Editing a Form

12) You will automatically begin editing the form that you just added. You have controls both at the top of the page and the bottom of the page to:

- Save – this allows you to save your work and continue editing. Once you have saved your work, if you exit the application, you will be able resume editing the form later.

- Save and Close – saves your work and returns you to the *Filing* page.

- Discard Change – discards any changes you made since your last save and returns you to the *Filings* page.

13) While editing, type in all the appropriate information. Currently there are no checks or validations—everything you enter will appear exactly as you type it. Any signature of signature date fields will be read-only and appear with the text *[Signature]* to indicate these are electronic signature fields.

14) When done editing the form, click the **Save and Close** button to return to the *Filings* page. Notice the newly-created form now appears in the *Current Forms* section of the page.

Editing Multi-Page Forms

15) Editing multi-page forms is very similar to editing a single-page form. There are some additional controls available. In addition to the Save and Discard buttons, there will be a **Previous Page**, **Next Page** and **Add New Page** buttons. On forms such as Itemized Contributions and Itemized Expenditures, there is a TOTAL field at the bottom. Add up all of the pages and enter this item only on Page 1.

Previewing Forms

16) To view a sample of the form you will be filing, click the **Preview** button. A preview page will load. Be patient as the bottom portion of the page is being generated for you. If you have problems viewing the PDF, there is an alternative download link at the top of the page which should allow you to open the PDF directly in your PDF viewer. When done, click the **Close Preview** button.
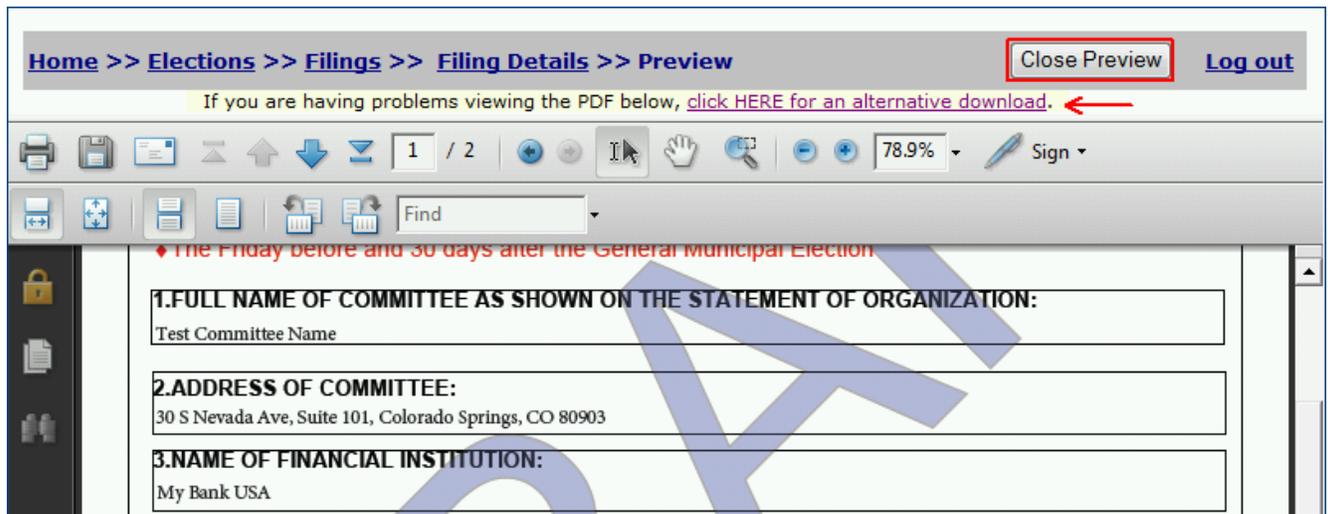
Deleting Forms

17) If you have added a form by mistake, simply click the **Delete** button and answer yes to the confirmation prompt. Be careful—once you delete a form, any contained information on that form will be lost.

Finished with Forms

18) When you have finished adding and editing all the forms you need, click the **Finished / Back to Filings** button.

Updating an Incomplete Filing

19) From the *Filings* page, click the **Update** button to return to the list of forms in an unfinished filing.

Submitting your Filing

20)   When finished with all forms for a filing, click the **Submit** button. You will be presented with a confirmation page showing the forms that comprise this filing.

You are about to submit the following forms as an electronic campaign finance filing.

| Form Description	Date/Time Last Changed
Detailed Summary Report of Contributions and Expenditures	1/4/2011 8:22:02 PM
Candidate Itemized Expenditures - $20.00 or More	1/4/2011 10:29:40 PM

[Submit Filing]   [Preview Filing]   [Cancel]

21)   To see a preview of the filing in its entirety, click the **Preview Filing** button. The preview process functions just like previewing a single form except that all forms will be presented as a single PDF.

22)   If you need to make some changes, click the **Cancel** button to return to the *Filings* page.

23)   If you are ready, click the **Submit Filing** button. You should see a confirmation page showing that your filing has been submitted. You will also see information about when a hardcopy is due at the City Clerk's Office. Use the **Get Signable** Filing button to print a version that can be signed and physically submitted to the City Clerk's Office. **Get Signable Filing** functions the same as a filing Preview.

You have successfulling submitted your compaign finance filing. This will satisfy the filing deadline requirements for this filing period.

However, you must still file a paper copy with the City Clerk's Office within 7 calendar days−currently Wednesday, January 1/12/2011, 2011, by 5:00 PM. To assist in this process, please click the button below to view a pre-filled version of your filing that can be signed and submitted.

[Get Signable Filing]   [Done]

24) You will also receive a confirmation email that you filing has been submitted. This email will contain the same hardcopy due date as well as links to the Campaign Finance Filing search page so that you can view your submitted filings.
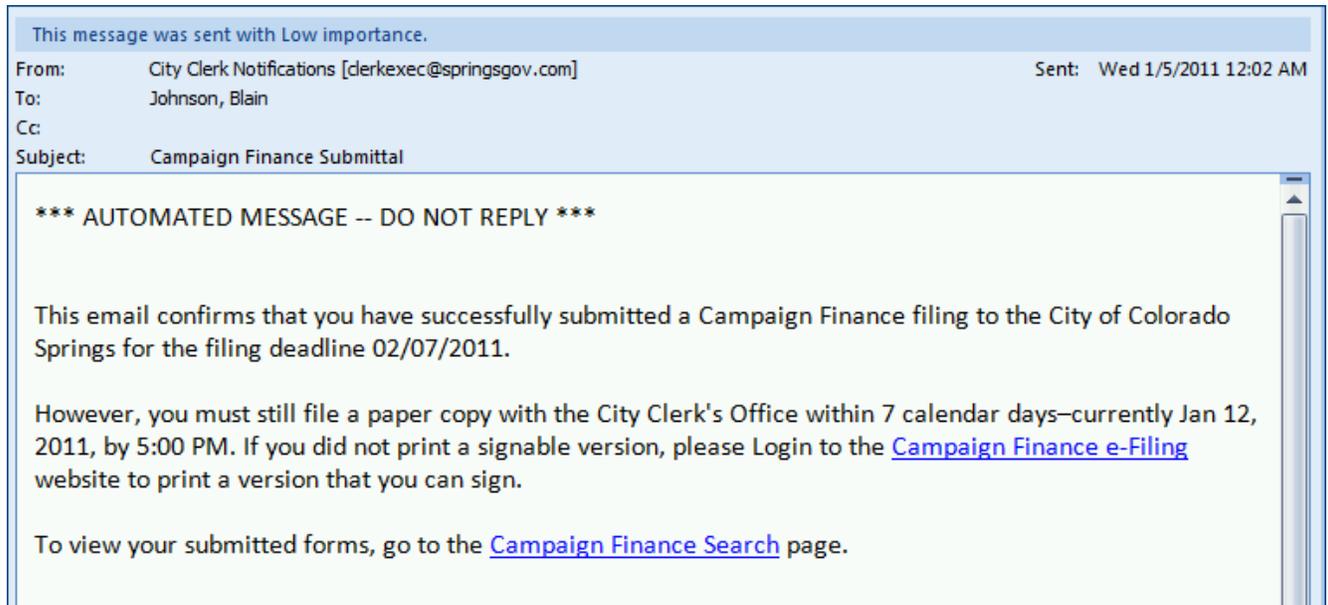
Previously Submitted Filings

25) For previously submitted forms, you generally have three options:

- **View** – This displays the submitted form. This is the same view as seen from Campaign Finance Filings search page and is here for your reference.

- **Amend** – Make changes to a previously submitted form (described below)

- **Get Signable** – For electronically filed forms, allows you to view a copy that can be printed, signed and turned in to the City Clerk's Office.

Amend Previously Submitted Form

26) Be aware that this *does not modify* your existing filing. This process simply makes a copy of your existing forms with all of their information into a new filing.

27) Once you click **Amend**, you will see the *Filings Details* page containing copies of the original filings forms. Now, you can add and remove forms, as necessary, from the new filing, make any changes necessary to the form contents and then submit the new, amended filing.

Miscellany

Logout

28)   When you are finished using the Campaign Finance e-Filing website, simply click the **Log out** button in the upper, right-hand corner.

Session Expired

29)   After 20 minutes of inactivity, the Campaign Finance e-Filing application will automatically expire your login session. If this occurs, you will see the following message displayed. You will need to login again to continue working with your filings. *You will not lose any information you have saved.* While editing a form, save often to ensure you do not lose any of your work.
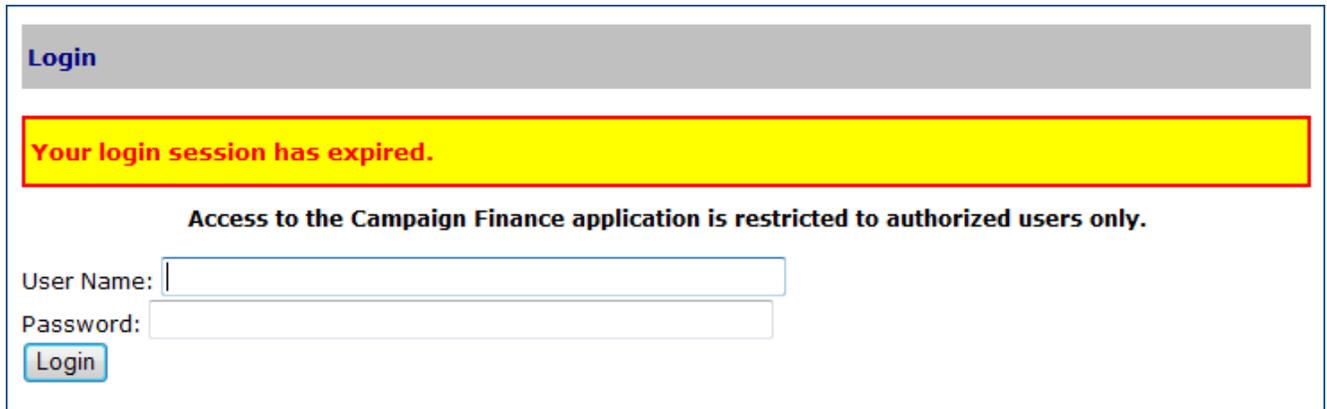
Login

Your login session has expired.

Access to the Campaign Finance application is restricted to authorized users only.
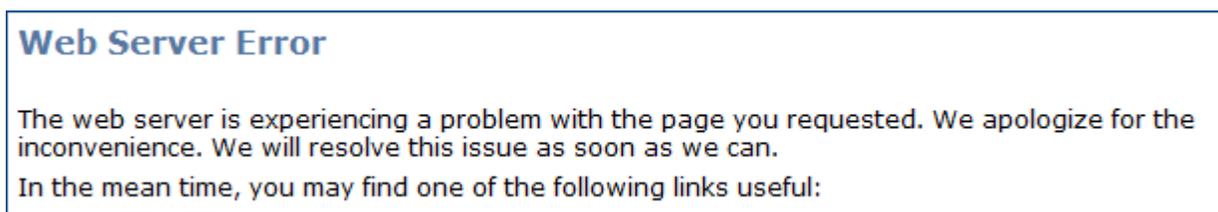
User Name:

Password:

Login

Other Errors

30)   In the event an unexpected error occurs, you might see a message similar to either of the two pictures below. Please contact the City Clerk's Office so that we can investigate the source of the problem.

Fatal database error has occurred in application
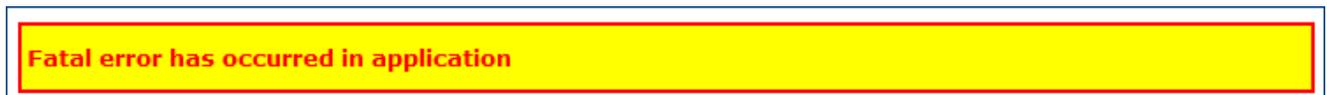
Fatal error has occurred in application

Web Server Error

The web server is experiencing a problem with the page you requested. We apologize for the inconvenience. We will resolve this issue as soon as we can.

In the mean time, you may find one of the following links useful: