Accessing Campaign Finance Electronic Filing System

2. Select “Candidate/PAC Logon”.

Signing-On Campaign Finance Electronic Filing System

1. Enter the User ID and Password issued by the Office of the City Clerk. Click *Sign On*. If you do not have a User ID or have trouble accessing the System, please call the Office of the City Clerk at 207-7253.
Creating Packet

1. To create a new packet, select Report Type COH (Candidate/Officeholder).
2. Select Report to be completed.
3. Select “Create Packet”.
1. To begin a Report, enter contact information for Candidate/Officeholder OR click on “Select Candidate/Officeholder” to view/select entry from Address Book.

* Note: Must disable pop-up blocker if utilizing Address Book.
1. Enter contact information for Campaign Treasurer OR click on “Select Campaign Treasurer” to view/select entry from Address Book.
2. Enter information for Period Covered, Election Date, Election Type, Office Held, and Office Sought.
3. Save data by selecting “Save Page”.

Cover Sheet 1
Campaign Treasurer Information
Adding Data and Navigating Report

1. As information for Cover Sheet 1 (CS1) is successfully saved, “Record Added” will be displayed at the top of the entry.
2. Cover Sheet 2 (CS 2) and all Schedules will be displayed at the top of the page.
1. If information IS NOT successfully saved, the User will see an error message at the top of the entry. Error message (which will be highlighted in red) will indicate what information is missing and/or needs correcting.

2. Correct Error and select “Save”.

1. If Direct Campaign Expenditures by Political Committees DOES NOT apply, go directly to Coversheet 2 without saving.
1. If you DO have entries, enter contact information for Committee OR click on “Select Committee” to view/select entry from Address Book.
1. Save data by selecting “Add Notice From Political Committees.”

2. Once data is successfully saved, “Record Added” will be displayed at the top of the entry.
1. Data successfully saved will be displayed in the middle of the page.
# Cover Sheet 2

## Report Totals

<table>
<thead>
<tr>
<th>Contribution Totals</th>
<th>Expenditure Totals</th>
<th>Contribution Balance</th>
<th>Outstanding Loan Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Political Contributions of $50 or less (Other than pledges, loans, or guarantees of loans), unless itemized: $0.00</td>
<td>Total political expenditures of $100 or less, unless itemized: $0.00</td>
<td>Total political contributions maintained as of the last day of reporting period: $0.00</td>
<td>Total principal amount of all outstanding loans as of last day of the reporting period: $0.00</td>
</tr>
<tr>
<td>System Filled from non-itemized Contributions entered in Schedule A1 and A2, if any.</td>
<td>System Filled from non-itemized Expenditures entered in Schedule F1, F2, F4, and C, if any.</td>
<td>Applicant Filled</td>
<td>Applicant Filled</td>
</tr>
</tbody>
</table>

1. Enter data for “Applicant Filled” fields.
2. Save data by selecting “Save Page”.

* Note that User WILL NOT receive an error message if Applicant Filled fields are left blank. However, User will receive a reminder message regarding the completion of the “Contribution Balance” information when submitting to the City Clerk (see slide 20 for more information).
1. Once data is successfully saved for “Applicant Filled” fields, “Totals Added” will be displayed at the top of the entry with financial data denoted in appropriate fields.
1. Totals for each Schedule are automatically populated as data is saved.
Schedule A1
Entering Data

1. Enter date of contribution. Date must be within designated reporting period. If entry is not within said period, an error message will be displayed at top of entry.
2. Enter Contributor contact information OR click on “Select Contributor Name” to view/select entry from Address Book.
4. Save data by selecting “Save”.

* Required effective June 21, 2018
1. Once data is successfully saved, “Record Added” will be displayed at the top of the entry while the entry will be displayed at the bottom of the page.
Schedules B thru T

Follow directions denoted for Schedules A1, A2, and A3

- Schedule B – Pledged Contributions
- Schedule E – Loans
- **Schedules F1, F2, F3, and F4 – Political Expenditures**
- Schedule G – Political Expenditures Made from Personal Funds
- Schedule H – Payment from Political Contributions to a Business of C/OH
- Schedule I – Non-Political Expenditures Made from Political Contributions
- Schedule K – Credits
- Schedule T – In-kind Contribution or Political Expenditure for Travel outside of Texas.
2. To submit completed Report to the Office of the City Clerk for posting to the web, select “Submit to City Clerk”.
3. For verification purposes, the User will be asked of intent to submit the Report to the Office of the City Clerk.
   a. If yes, select “Continue”. User will be asked to complete Oath.
   b. If no, select “Main Menu” and User will be directed back to Main Menu.
1. User will be reminded to complete Applicant Filled sections on Cover Sheet (CS2).
2. If “Cancel” is selected, message at top of page will inform User that the Report was not submitted to the City Clerk.
Completing Oath
Submit Report to City Clerk

If User is ready to submit Report to the City Clerk, complete Oath by selecting “OK”.

1. If User is ready to submit Report to the City Clerk, complete Oath by selecting “OK”.
2. Once Oath is completed, User will be directed back to Main Menu.
1. Upon completion of Oath, the Lockdown Status of the Report will be denoted as “Pending” within the “Complete Packets/Lock Down” Section of the User’s Menu.
2. The User will be notified via e-mail address provided when Report submitted has been “Locked Down” by Staff and made available to the public for viewing. It is important that the Office of the City Clerk has correct Candidate e-mail address.
1. Reports started but not submitted to the Office of the City Clerk will be available in the “Incomplete Packets” Section of the User’s Menu.

2. Reports can be accessed by clicking on the Report Type to enter additional data from any computer with internet access.
OFFICE OF THE CITY CLERK
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CAMPAIGN FINANCE
ELECTRONIC FILING SYSTEM

USER’S GUIDE

CREATING CORRECTION AFFIDAVIT
Creating Correction Affidavit

1. From the “Complete Packets / Lock Down Section of the User’s Menu, select the Report that requires correcting.

2. Select “Correction Affidavit” from menu.
Creating Correction Affidavit

1. Enter short explanation of corrections.
2. Check the applicable boxes in the Oath Section.
3. Click “Save Corrections”.
1. Once data is successfully saved, “Correction Affidavit Added” will be displayed at the top of the entry.
2. Main Menu and Schedules will be displayed at the top of the page.
Creating Correction Affidavit
Adding Entries

1. To add entries not listed in original Report, select the appropriate Schedule.
2. Enter new data, save, and submit like original Report.
Creating Correction Affidavit
Correcting Amounts, Description, Occupation, and Employer

1. Select the appropriate Schedule containing the entry that requires updating.
2. From the entries listed at the bottom of the page, locate the entry that requires updating.
3. Select “Edit” located at right side of entry.
Creating Correction Affidavit
Correcting Amounts, Description, Job Title, and Employer

1. Within entry, make correction to needed information.
2. Once data is successfully saved, appropriate message will be displayed at the top of the entry.
3. Upon completion of all corrections, follow the same process for submitting a Report and completing Oath.
1. To edit Contact information, select the appropriate Schedule containing the entry that requires updating.
2. From the entries listed at the bottom of the page, locate the entry that requires updating.
3. Select “Edit” located on the right side of the entry.
Creating Correction Affidavit
Editing Contact Information

1. Select “Change Contact Info”. Must disable pop-up blocker.
Creating Correction Affidavit
Editing Contact Information

1. Within pop-up window, update contact information.
2. Once complete, select “Update”.

![Diagram showing contact information fields](image)
Creating/Submitting Correction Affidavit
Editing Contact Information

1. Corrected Contact information will appear in entry located at bottom of page.
2. Select “Save”.
3. Once corrected data is successfully saved, “Record Updated” will be displayed at the top of the entry.
4. Upon completion of all corrections, follow the same process for submitting a Report and completing Oath.
OFFICE OF THE CITY CLERK
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USER’S GUIDE
CLOSING OUT CAMPAIGN
1. Select “Final Report (Close Out Campaign)”.
2. Click on the appropriate radio buttons for Questions 3, 4, and 5.
3. Select “Save” located at bottom of page.
Creating/Submitting Final Report
Closing Out Campaign

1. Once data is successfully saved, “Final Report has been saved” will be displayed at the top of the entry.
2. Continue with completion of report by selecting “Submit to City Clerk”.

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CAMPAIGN FINANCE
ELECTRONIC FILING SYSTEM
USER’S GUIDE
MANAGING ADDRESS BOOK
Managing Address Book
Selecting Contact Information

1. To select an entry from the Address Book, click on “Select Candidate/Officeholder” or appropriately titled item. (“Campaign Treasurer” on CS1; Committee Name on CS2; Contributor Name on Schedule A1; Payee Name for Schedule F1; etc.).
Managing Address Book
Selecting Contact Information

1. Address Book entries will appear in a pop-up window.
2. Click on “Select” for the appropriate entry.
3. Entry will auto-populate with contact information selected.
Managing Address Book
Editing Contact Information

1. Entries appearing in the Address Book are edited within Schedules.
1. To transfer data maintained within Address Book to an excel document, select “Download List to Excel”.

<table>
<thead>
<tr>
<th>select</th>
<th>Name</th>
<th>Address</th>
<th>Mailing Address</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>select</td>
<td>Candidate, Grandma</td>
<td>1000 River Bend, San Antonio, TX 78200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>select</td>
<td>Candidate, Grandpa</td>
<td>1011 River Bend, San Antonio, TX 78200-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>select</td>
<td>Consultant, Ms Political</td>
<td>500 Victory Lane, San Antonio, TX 78205</td>
<td></td>
<td></td>
</tr>
<tr>
<td>select</td>
<td>Election, May</td>
<td>1 Main Street, San Antonio, TX 78205</td>
<td></td>
<td></td>
</tr>
<tr>
<td>select</td>
<td>Election, November</td>
<td>2 Main Street, San Antonio, TX 78205</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. User will be asked “Do you want to open or save this file.”

Select the appropriate option.
Managing Address Book

Downloading Contacts to Excel

1. Address Book entries will be successfully downloaded into an Excel document.