THE CITY OF COLUMBUS
CITY COUNCIL

CAMPAIGN FINANCE APPLICATION

Guidelines

August 2021

Contents

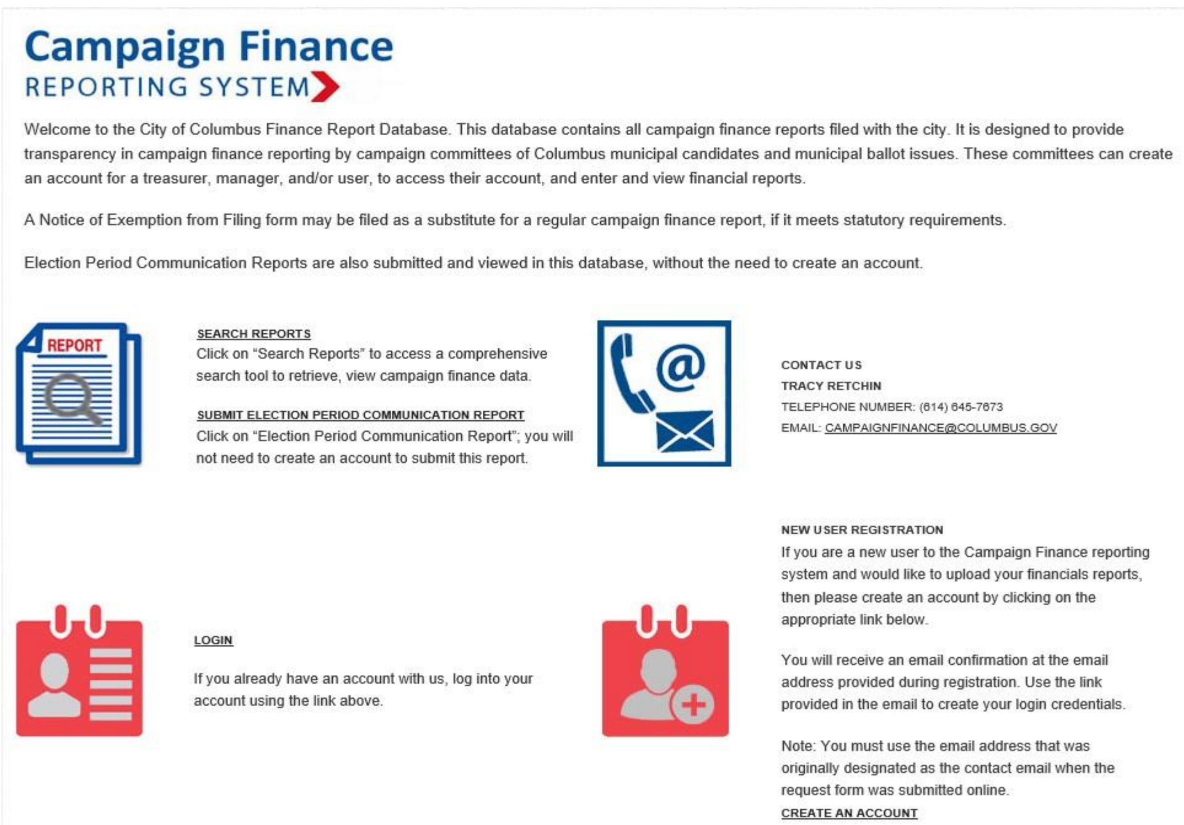
Account Management

To file a Campaign Finance or Notice of Exemption from Filing report with the City of Columbus, an account first must be created in the Campaign Finance Database.

Please note: an account is not required to file an Election Period Communication Report.

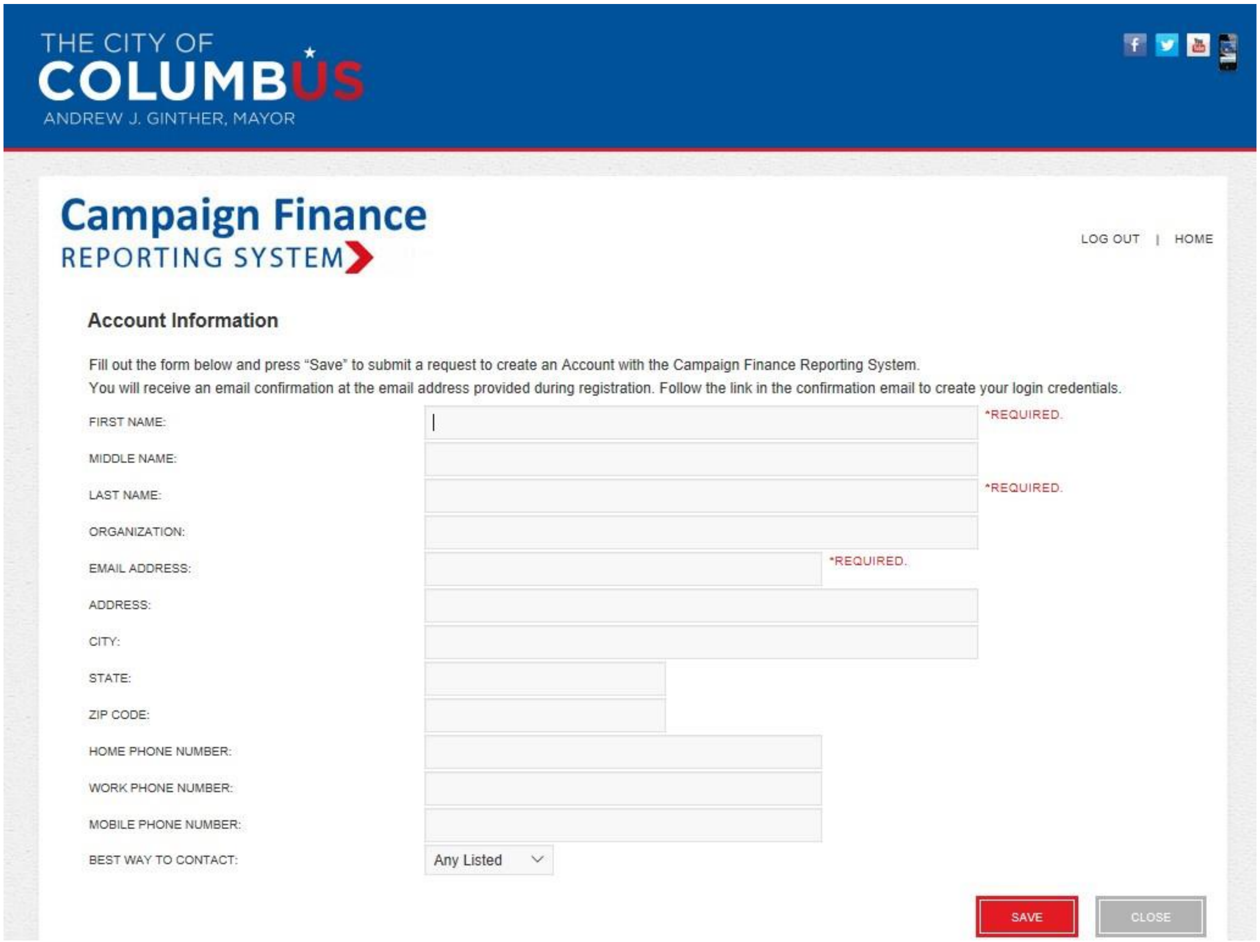
Account Creation

To create an account, please select the "CREATE AN ACCOUNT" link in the "New User Registration" section located on the bottom right side of the Campaign Finance home page.



THE CITY OF COLUMBUS
CITY COUNCIL

Click on the "CREATE AN ACCOUNT" link, and the following page appears:



On the Account Information Page, fill out all required fields (marked *REQUIRED) and any relevant optional fields, including a current phone number. There is a minimum amount of required information to create an account. Each user creating an account will need a valid email address that will be used to verify their account. **Account creation cannot be completed without a valid email address.**

Once the form is completed, select the "Save" button. If the form is completed correctly, a successful submission message will be displayed: **"Your account information was submitted successfully. Please check your emails to set up your account."**

If there are any issues with the form, an error message will be displayed at the top of the page. The form will need to be corrected before continuing.

Once all information is submitted successfully, an email will arrive in the email account supplied in the Account Information form. Click on the link in the email to load a new page asking for the user's email address.

Creating a Password

The user must create a password. The password will need to be confirmed, and both password fields will need to match before the credentials are saved in the Campaign Finance application. Once the account has been created and approved, the user may log into the Campaign Finance application to create campaign committees and report campaign finance information (i.e., contributions and expenditures).

Updating Account Information

After signing in, updating and adding information to user accounts can be completed through the "Account Information" page that is accessed by clicking on the "MANAGE YOUR PROFILE" link on the "Campaign Committee Information" page:

Campaign Finance
REPORTING SYSTEM

LOG OUT | HOME

- **Campaign Committee Information**

The "Campaign Committee Information" section lists all the types of functionality available to you including managing your profile.

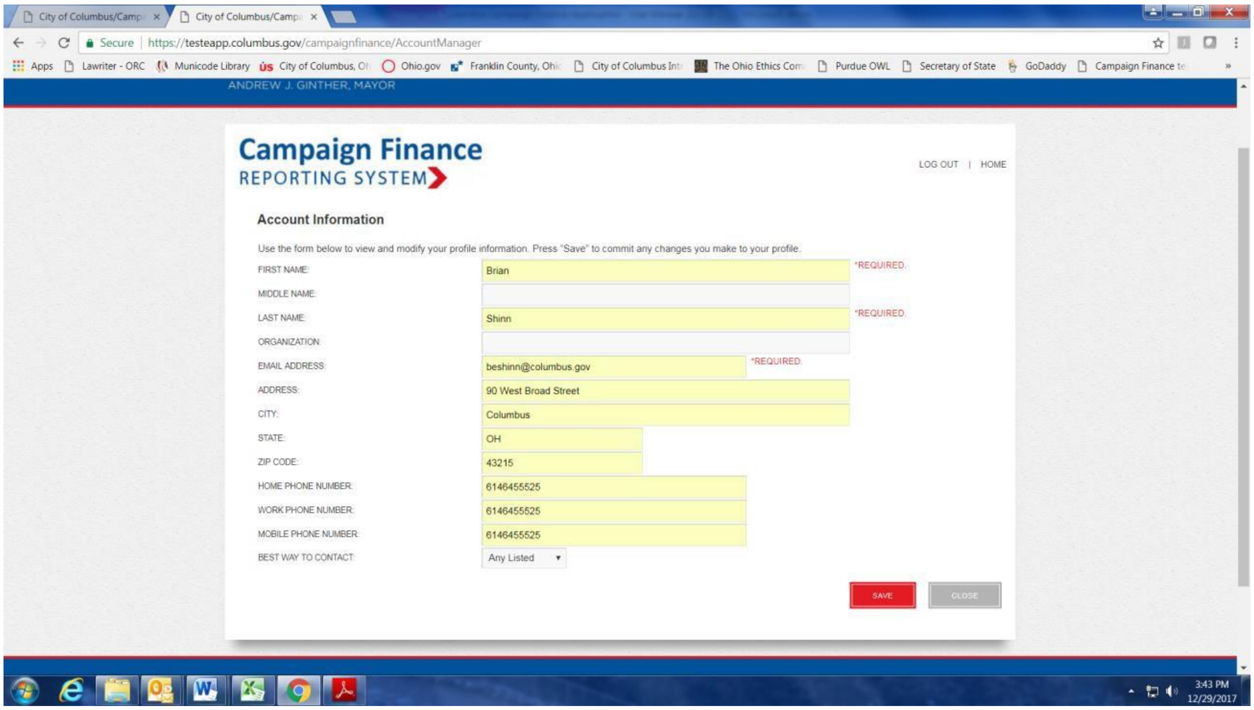
  - CREATE/VIEW/EDIT COMMITTEE
  - SUBMIT FINANCIAL REPORT
  - NOTICE OF EXEMPTION REPORT
  - VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
  - PENDING REPORTS
  - MANAGE YOUR PROFILE

- **Forms**

Below is a list of different campaign finance forms prescribed by the Ohio Secretary of State for use in reporting and for your reference. Links are provided for both standard and fillable PDF files.

  - **30-A Printable PDF** Ohio Campaign Finance Report
  - **30-A Fillable PDF** Ohio Campaign Finance Report

From the “Account Information” page, users can modify their profile. Information such as address, contact information, registered email address, and updating the current password can be managed from this page:



Change or add information as required within the form. Once all the information is updated, select the red “**SAVE**” button at the bottom right corner of the screen to have the information saved to the user’s profile. Profile information can be updated at any time from this screen.

Committee Management

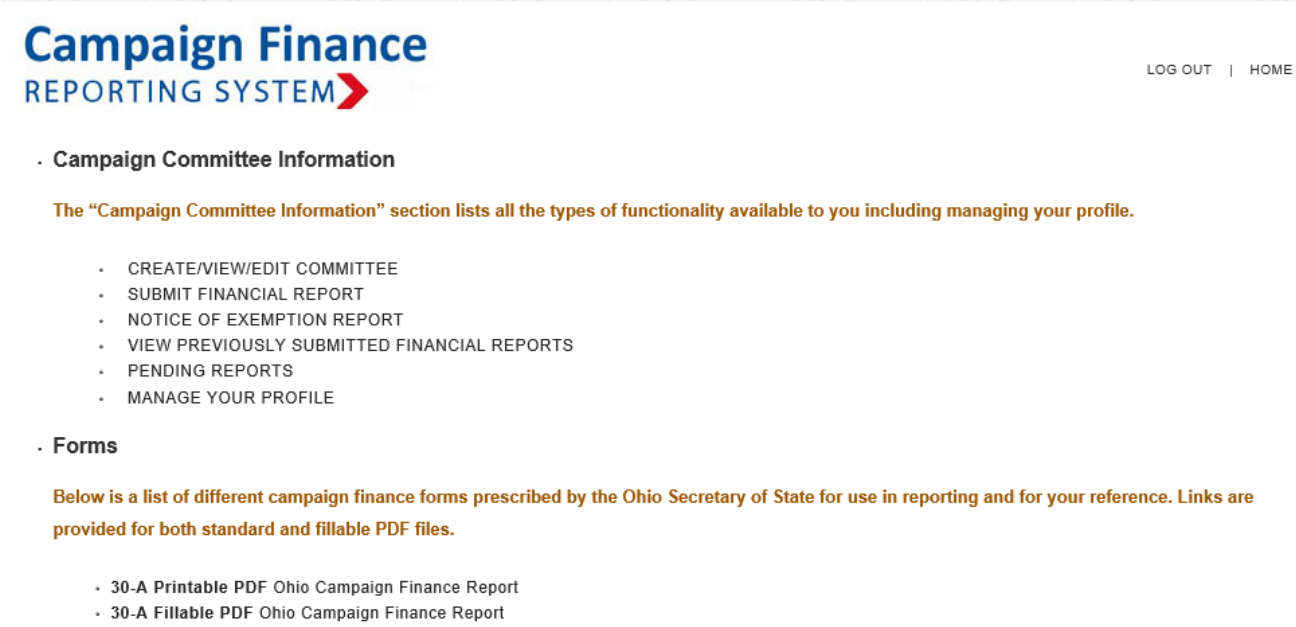
Campaign committees for candidates or ballot issue committees may be registered by anyone who has created an account with the Campaign Finance application.

A registered user who creates a campaign committee for a candidate or ballot issue becomes the Account Manager for that committee. The Account Manager may designate a Treasurer, change a Treasurer, add additional users, delete users, and is the person who controls the account.

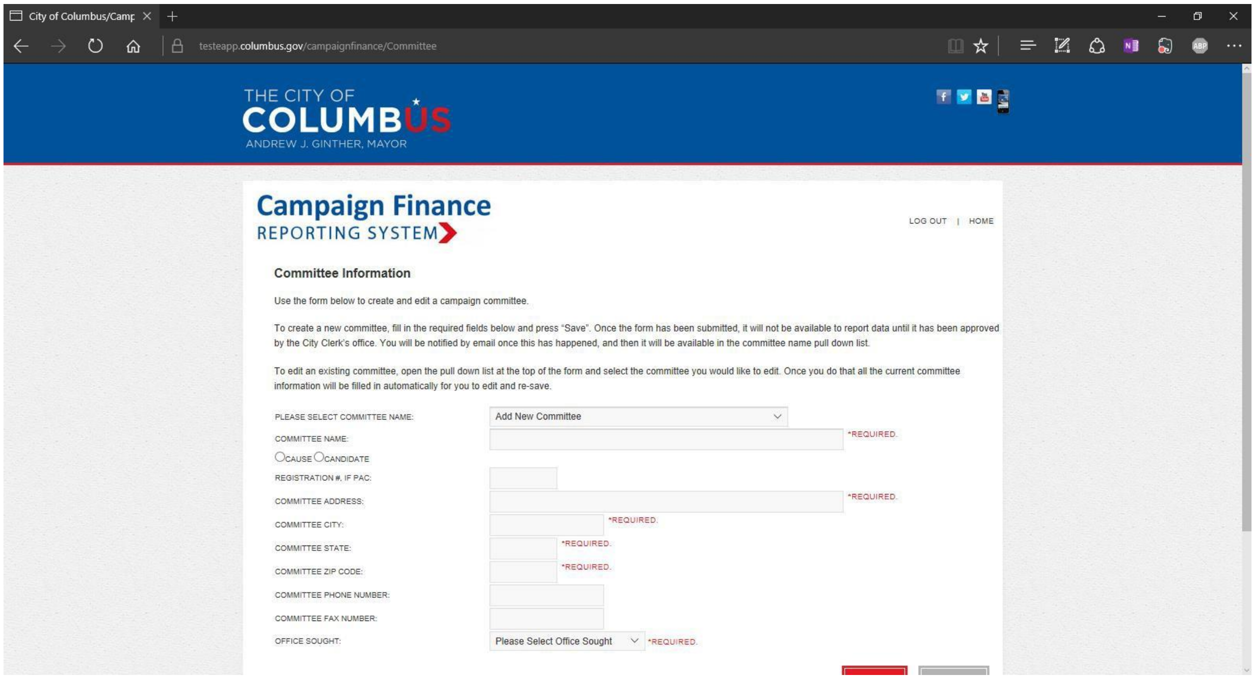
Once a campaign committee has been registered in the application and has a Treasurer designated, campaign finance information (contributions and expenditures) may be reported for the committee by the Account Manager, Treasurer, or any additional user who has been added to the committee.

Committee Creation

To create a committee, from the "Campaign Committee Information" page click on the "CREATE/VIEW/EDIT COMMITTEE" link:



This will load the "Committee Information" page:

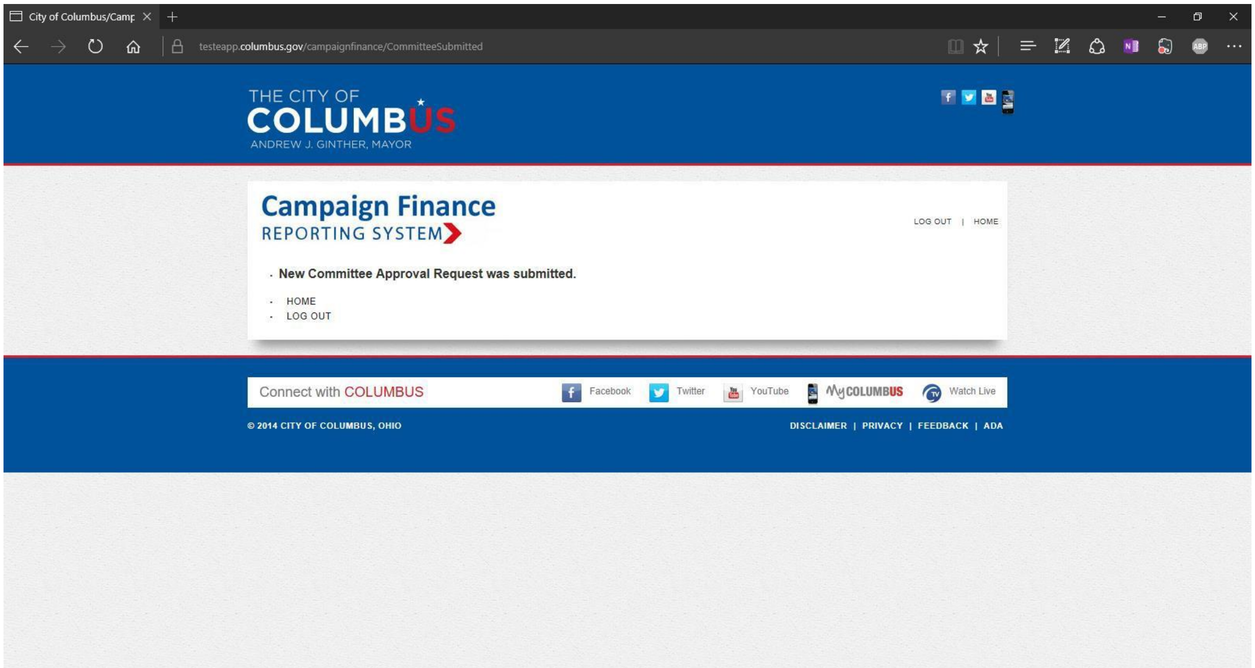


Fill out all required fields (marked *REQUIRED) and any relevant optional fields:

- Please Select Committee Name – Ensure this field has "Add New Committee" selected in the field from the pull down menu
- Committee Name – Enter the complete committee name
- Cause or Candidate – Select the radio button for the appropriate committee type (the information fields are different for cause and candidate committees)
- Registration #, if PAC – If this is a PAC, enter its registration number
- Committee Address
- Committee City
- Committee State
- Committee Zip Code
- Committee Phone Number (optional, but helpful contact information)
- Committee Fax Number (optional)
- Office sought – If the committee is a candidate committee, select which office the candidate is seeking from the pull down menu

Once all the information is updated, click on the red "SAVE" button at the bottom right corner of the screen to have the information saved into the application.

The user will receive notification that the New Committee Approval was submitted:



The user will also receive a confirmation email at the email address that was registered with the system. Our staff will review and approve the committee or contact if they need additional information, and then the user will receive an additional email confirming that the committee has been approved and that a Treasurer can be added for the campaign committee.

NOTE: Once the committee has been approved, a registered TREASURER must be designated for the campaign committee before the system will permit the Account Manager, the Treasurer, or any additional authorized user to submit campaign finance information (i.e., contributions and expenditures).

Committee Editing

Editing a committee is very similar to creating one. From the “Campaign Committee Information” page select the “CREATE/VIEW/EDIT COMMITTEE” link:

THE CITY OF COLUMBUS CITY COUNCIL

Campaign Finance REPORTING SYSTEM

LOG OUT | HOME

- **Campaign Committee Information**

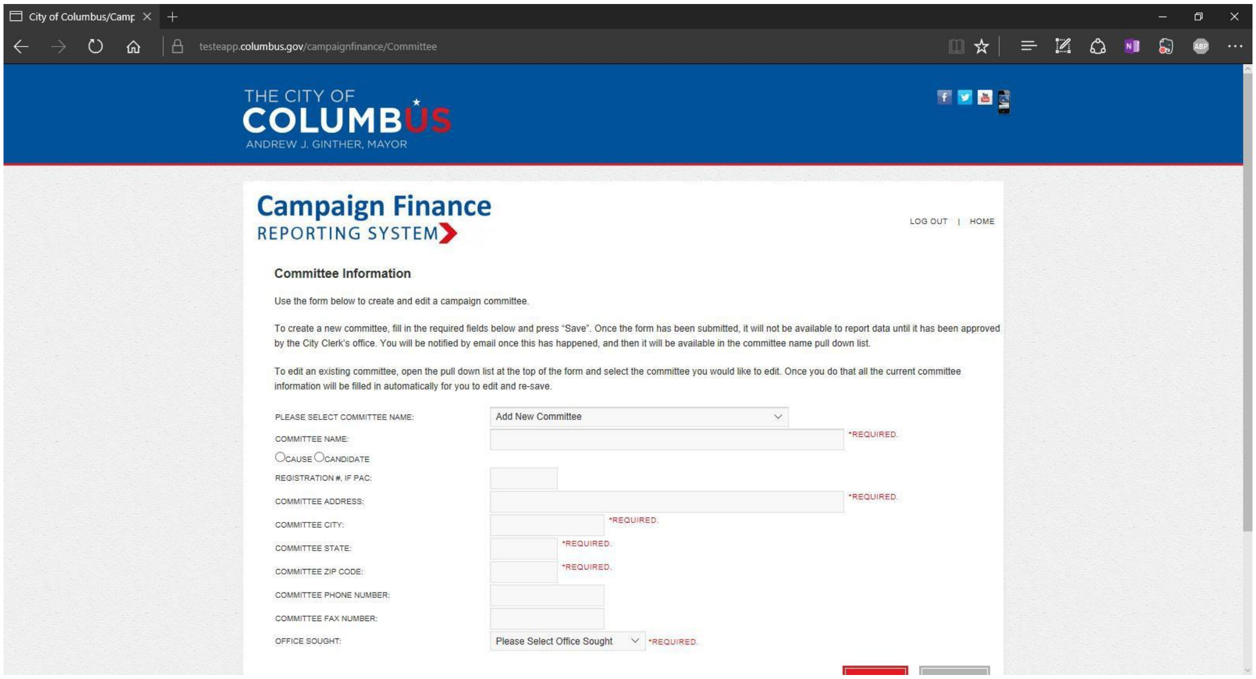
The "Campaign Committee Information" section lists all the types of functionality available to you including managing your profile.

- CREATE/VIEW/EDIT COMMITTEE
- SUBMIT FINANCIAL REPORT
- NOTICE OF EXEMPTION REPORT
- VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
- PENDING REPORTS
- MANAGE YOUR PROFILE

- **Forms**

Below is a list of different campaign finance forms prescribed by the Ohio Secretary of State for use in reporting and for your reference. Links are provided for both standard and fillable PDF files.

- **30-A Printable PDF** Ohio Campaign Finance Report
- **30-A Fillable PDF** Ohio Campaign Finance Report



This will load the “Committee Information” screen:

From the "PLEASE SELECT COMMITTEE NAME" field, select the campaign committee in order to make any edited from the pull down list of committees associated with the committee's account. Once selected, the form will auto-populate with the current information saved in the application for that committee. Changes may then be made to the information fields. Once the information is updated and completed, click on the red "SAVE" button at the bottom right corner of the screen to store the new information in the application.

The system will indicate that the committee information was saved successfully. Click on the gray "CLOSE" button at the bottom right of the screen to exit that screen.

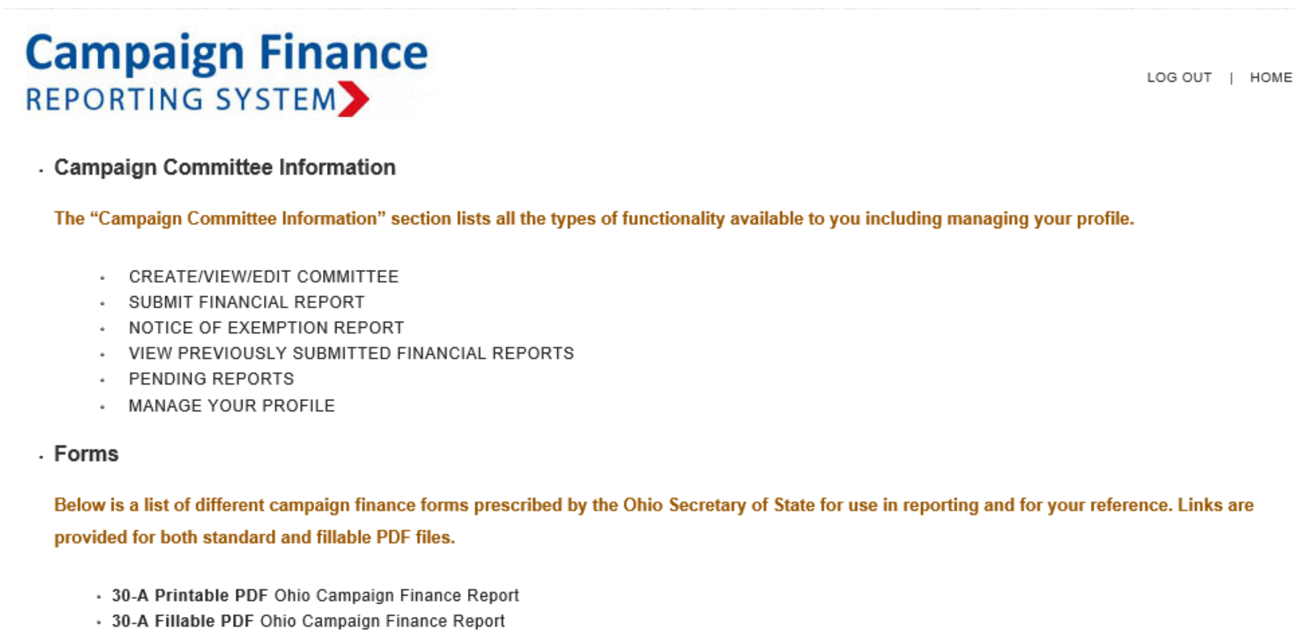
Designating a Treasurer

Once a committee has been created and approved, a Treasurer **MUST** be designated by a registered user for the campaign committee **BEFORE** any financial any campaign finance reports can be submitted.

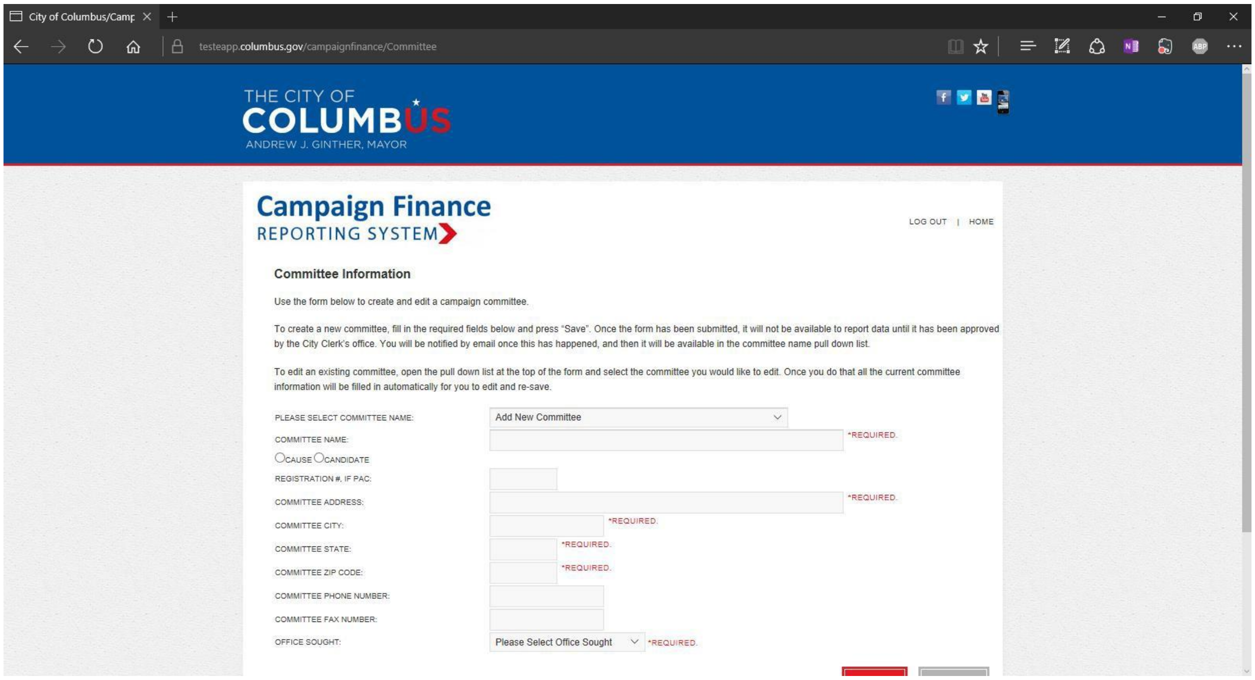
Please note: in order to designate a user as Treasurer for the campaign committee, the user must already have a registered account with the City of Columbus Campaign Finance application.

For instructions on how to create a user account, please see the section on Account Creation on page 3, above.

To designate a Treasurer for a campaign committee, start from the "Campaign Committee Information" page and select the "CREATE/VIEW/EDIT COMMITTEE" link:



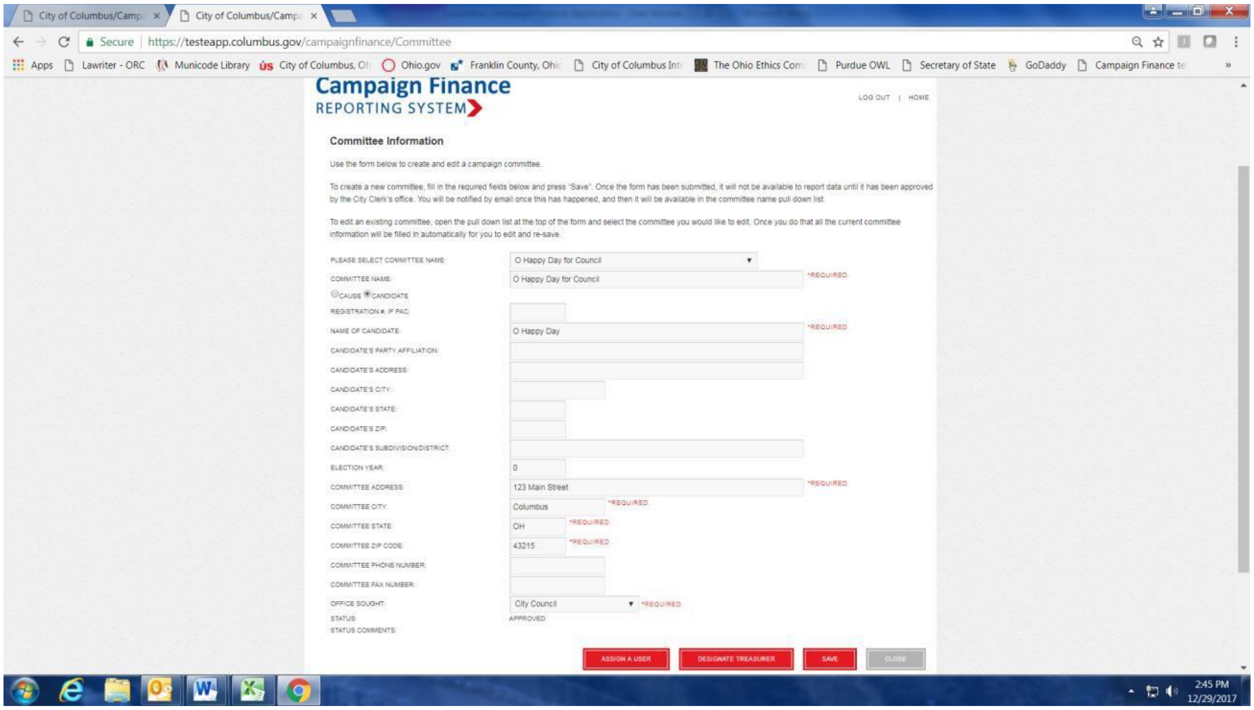
This will load the “Committee Information” screen:



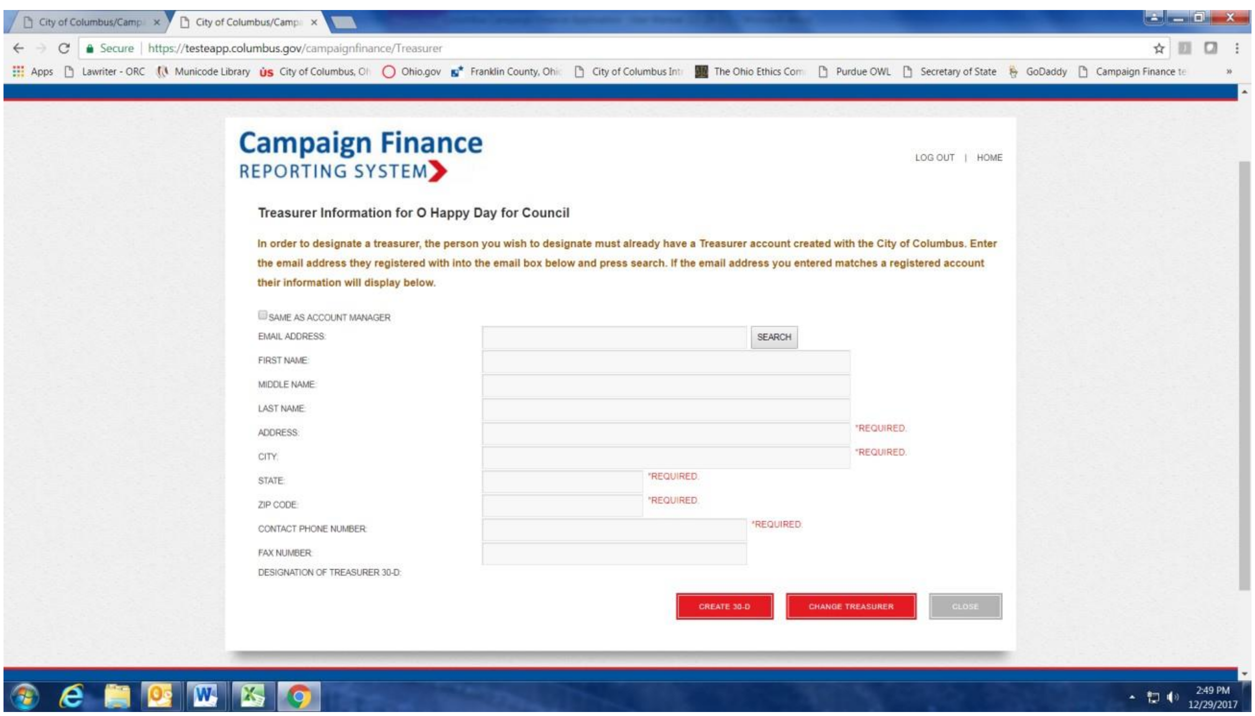
Select the name of the committee to designate a Treasurer for the campaign committee from the pull down menu in the “PLEASE SELECT COMMITTEE NAME” field.

Once the information for that committee is loaded, follow these steps:

1. Click on the red “**DESIGNATE TREASURER**” button at the bottom of the “Committee Information” page to load the “Treasurer Information”:



The “Treasurer Information” page will load for the Committee:



2. There are two options for designating a treasurer from the "Treasurer Information" page:

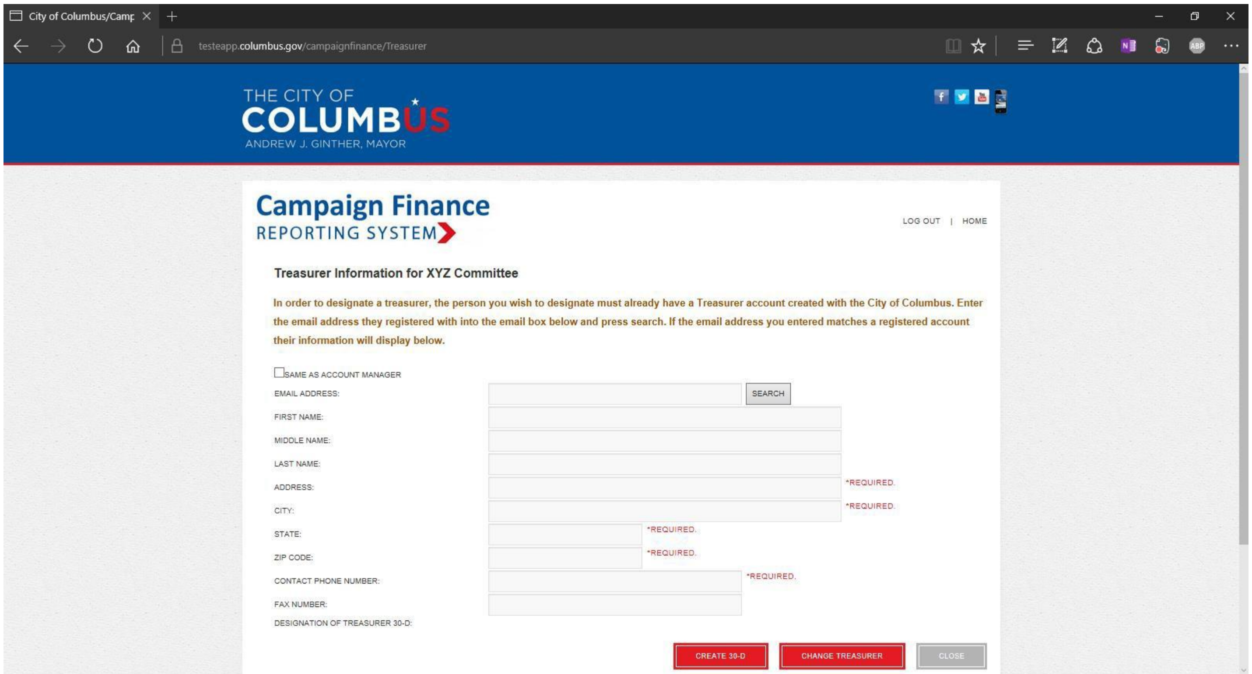
    a. Option 1 - Clicking the "SAME AS ACCOUNT MANAGER" box will designate the Account Manager for that committee as the Treasurer and use their existing profile information. The profile information will be automatically populated into the form. The information can then be modified before clicking on the red "**SAVE**" button at the bottom right of the screen.

    b. Option 2 – In the "EMAIL ADDRESS" field input the email address for a user who is **already registered with the application** and click on the "SEARCH" button. If the email address is found in the application, the user's profile information will be populated in the form. The information can then be modified if desired before clicking on the red "**SAVE**" button on the bottom right of the screen to complete the process.

A user who is designated as Treasurer for a campaign committee will receive a confirmation email at the email address registered for their account informing them that they have been designated as a Treasurer for that committee.

Creating a 30-D Designation of Treasurer Form

An Ohio Secretary of State Form 30-D Designation of Treasurer Form can be generated in the Columbus Campaign Finance application for filing with the Franklin County Board of Elections. This can be done from the "Treasurer Information" page within the "Committee Information" section of the application. While viewing the "Treasurer Information" page for the committee that the 30-D will be generated for, click on the red "**CREATE 30-D**" button at the bottom of the page. This will automatically create a PDF file with all the Treasurer information populated in it. Once the form has been generated a "View Form 30-D" link will appear at the bottom of the page in the "Designation of Treasurer 30-D" row of the form. Selecting the hyperlink will download the document.



Additional User Management

If desired, Account Managers and Treasurers may add users to a committee to give additional users the ability to submit financial reports for that campaign committee.

To add an additional user for a campaign committee, start from the “Campaign Committee Information” page and select the “CREATE/VIEW/EDIT COMMITTEE” link:

THE CITY OF COLUMBUS
CITY COUNCIL

Campaign Finance
REPORTING SYSTEM

LOG OUT | HOME

- **Campaign Committee Information**

The "Campaign Committee Information" section lists all the types of functionality available to you including managing your profile.

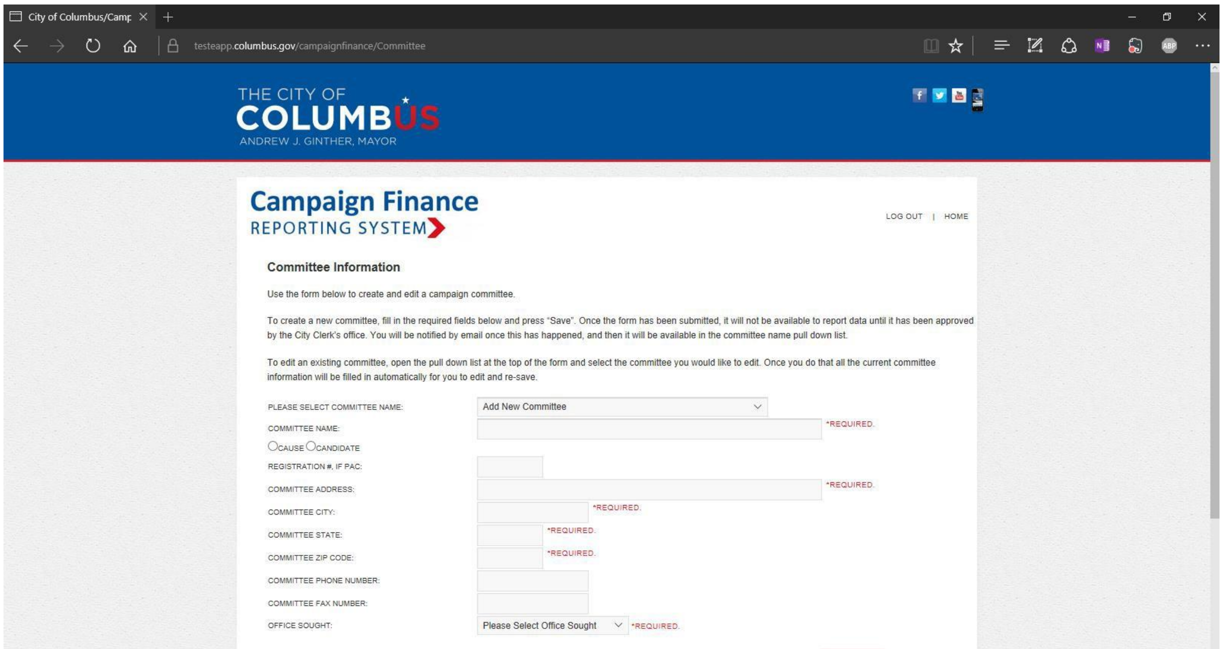
- CREATE/VIEW/EDIT COMMITTEE
- SUBMIT FINANCIAL REPORT
- NOTICE OF EXEMPTION REPORT
- VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
- PENDING REPORTS
- MANAGE YOUR PROFILE

- **Forms**

Below is a list of different campaign finance forms prescribed by the Ohio Secretary of State for use in reporting and for your reference. Links are provided for both standard and fillable PDF files.

- **30-A Printable PDF** Ohio Campaign Finance Report
- **30-A Fillable PDF** Ohio Campaign Finance Report

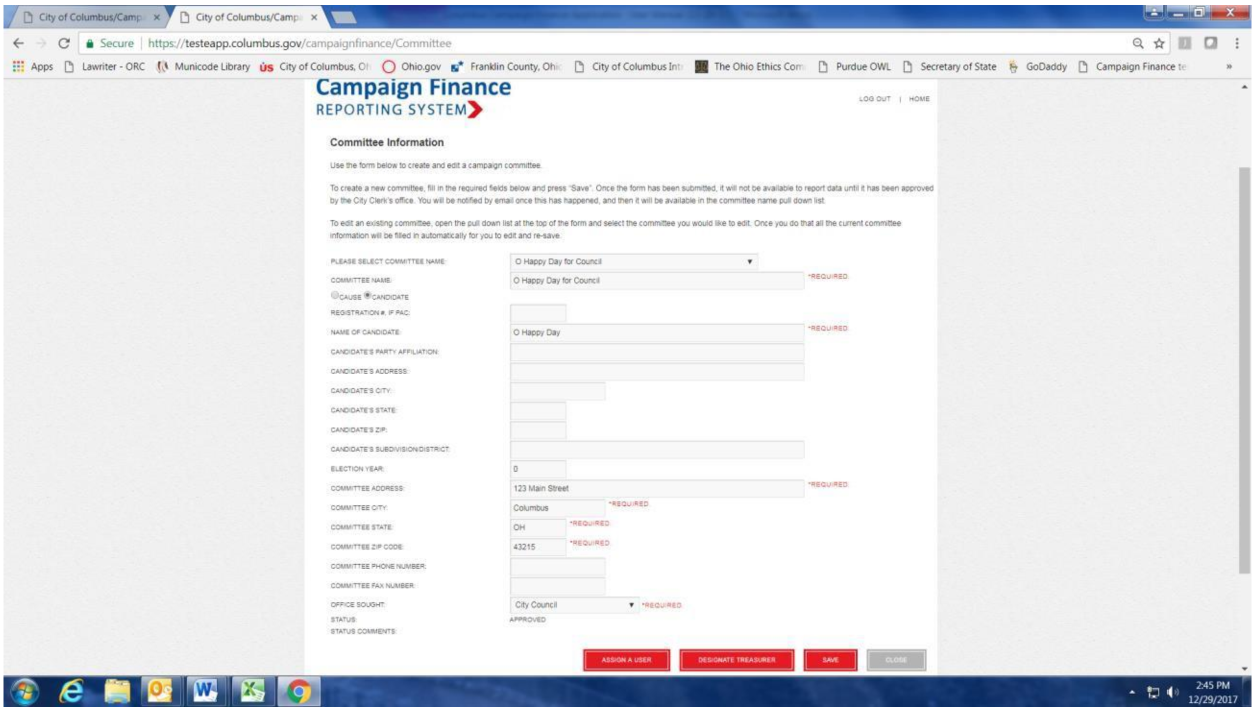
This will load the "Committee Information" screen:



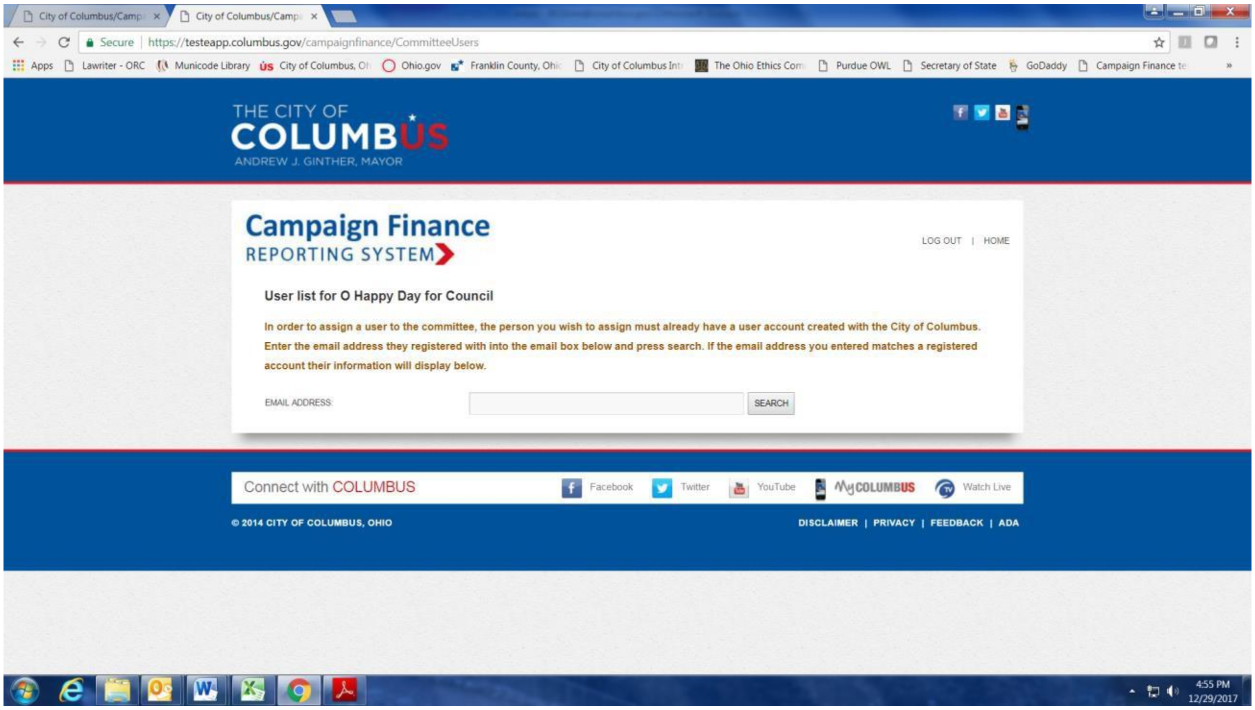
Select the name of the committee to add a user for the campaign committee from the pull down menu in the “PLEASE SELECT COMMITTEE NAME” field.

Once the information for the committee is loaded, follow these steps:

1. Click on the red “**ASSIGN A USER**” button at the bottom of the “Committee Information” page to load the “User List” Screen:



From the User List screen:



2. Type the email address for the account that should be added as a user and click on "SEARCH."

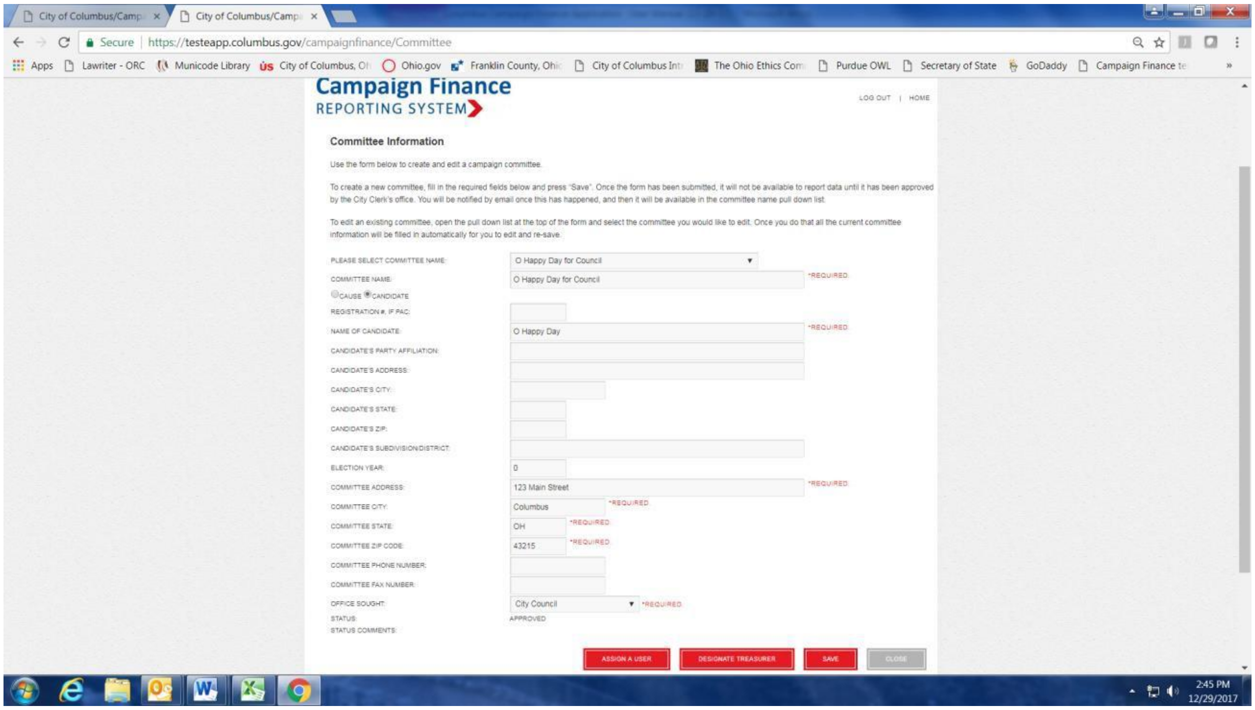
Please note: *in order to add an additional user for a campaign committee, the user must already have a registered account with the City of Columbus Campaign Finance application.*

*For instructions on how to create a user account, please see the section on Account Creation on page 3, above.

3. If the email address is registered with the Campaign Finance application, the following message will appear: "USER WAS FOUND IN THE SYSTEM. CLICK ADD TO ASSIGN THE USER TO THE COMMITTEE."
    a. Click on the gray "ADD USER" button to complete the process and register the user. A user who is added to a campaign committee will receive a confirmation email.

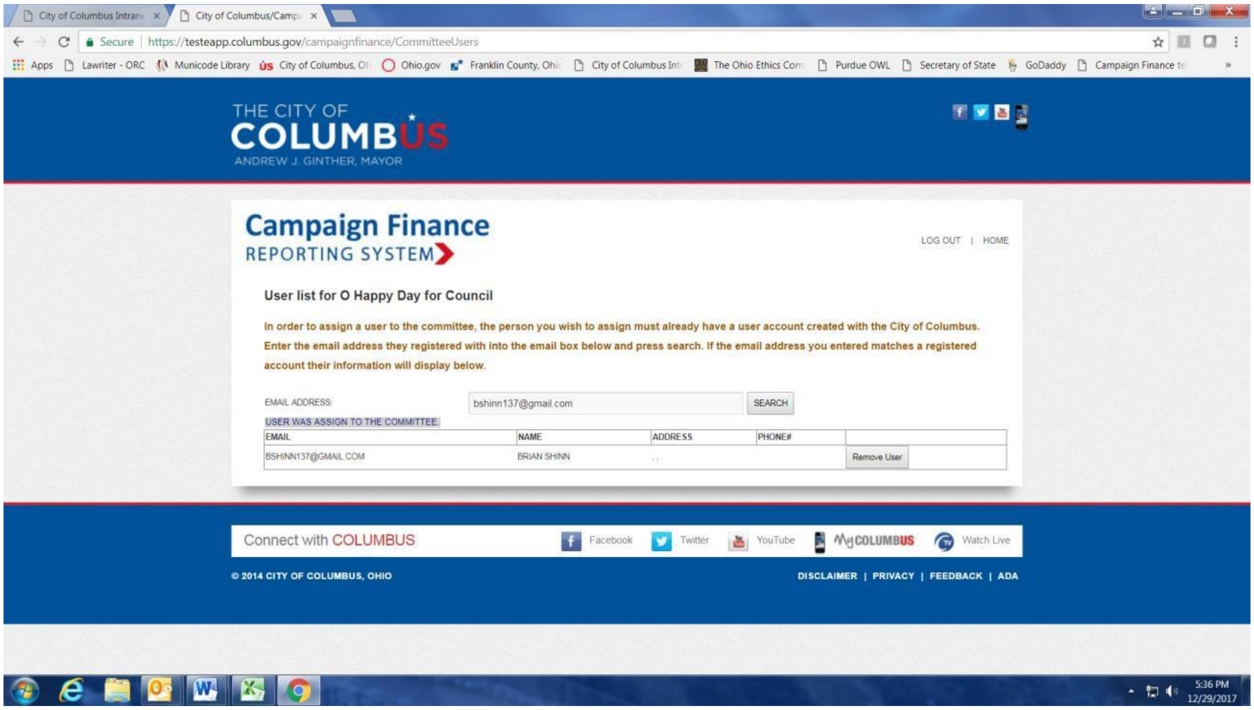
Additionally, an **Account Manager** can **remove users** already added from the "User List" screen. To view the current list of users for a committee:

1. Go into the "Committee Information" screen and select the campaign committee from the pull down menu.



2. Click on the red "**ASSIGN A USER**" button at the bottom of the screen.

3. The current user list will be displayed below the search box.



4. Click on the gray “Remove User” button to the right of the user’s email address and name to remove the user’s access to the campaign committee.

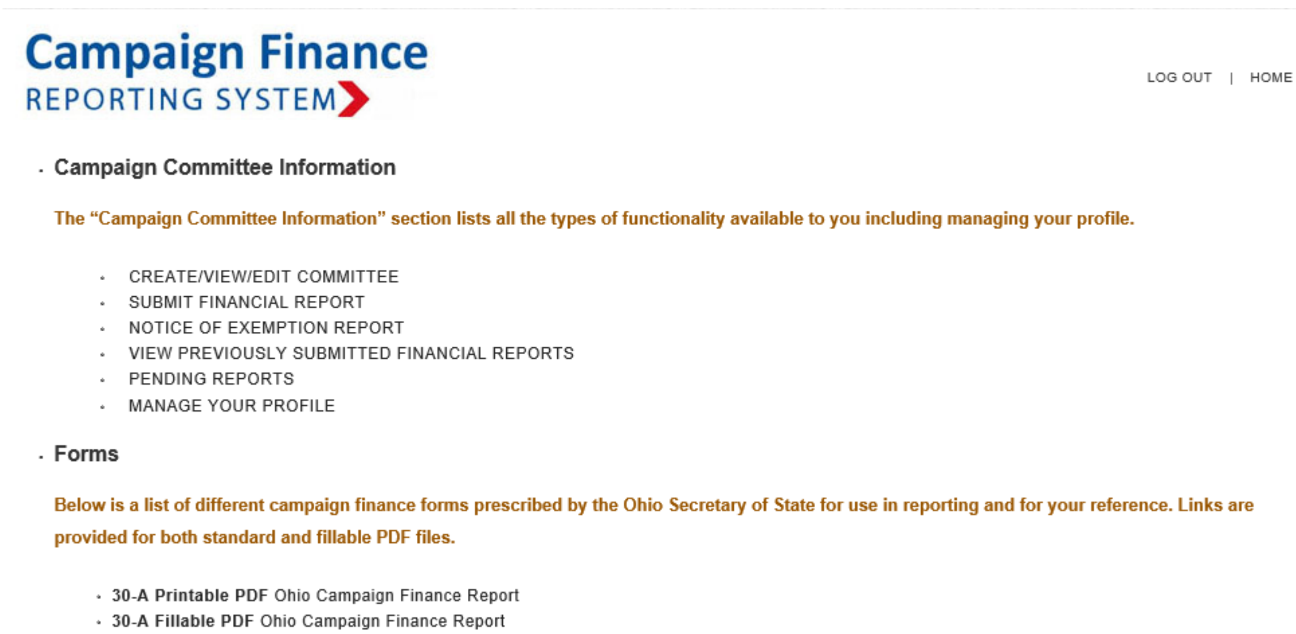
Campaign Finance Reporting

With the Columbus Campaign Finance application, campaign committees can report contributions and expenditures as required by the City of Columbus. Report submitting is a multistep process. A campaign finance report does not need to be completed at the time it is started. It can be completed at a later time from the "Pending Reports" section of the site that will be covered later in this document.

Submitting a Report

Cover Page Creation (Step 1)

1. Select "SUBMIT FINANCIAL REPORT" from the "Campaign Committee Information" page:



Campaign Finance
REPORTING SYSTEM

LOG OUT | HOME

- **Campaign Committee Information**

The "Campaign Committee Information" section lists all the types of functionality available to you including managing your profile.

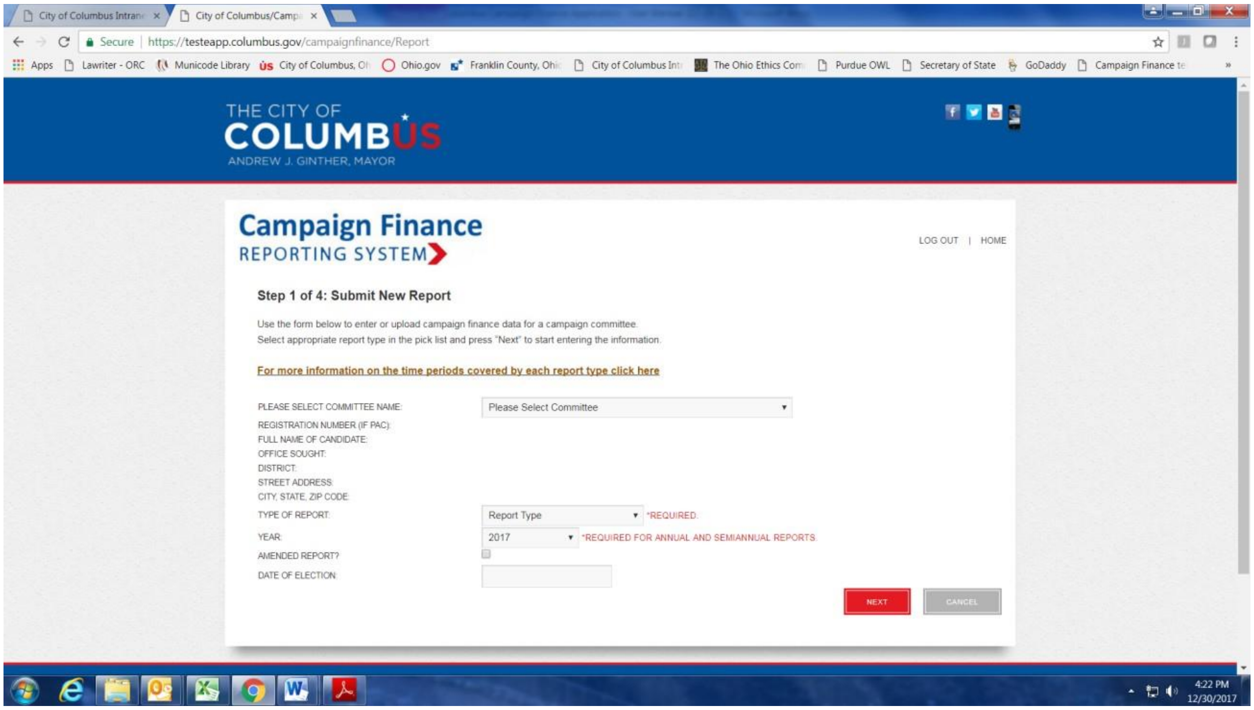
- CREATE/VIEW/EDIT COMMITTEE
- SUBMIT FINANCIAL REPORT
- NOTICE OF EXEMPTION REPORT
- VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
- PENDING REPORTS
- MANAGE YOUR PROFILE

- **Forms**

Below is a list of different campaign finance forms prescribed by the Ohio Secretary of State for use in reporting and for your reference. Links are provided for both standard and fillable PDF files.

- **30-A Printable PDF** Ohio Campaign Finance Report
- **30-A Fillable PDF** Ohio Campaign Finance Report

2. In the "Please Select Committee Name" field on the "Submit New Report" page, select the committee from the pull down menu.



3. Specify the report type, this field is required. Ensure that the correct report type is chosen. The report type cannot be changed by a user once the report has been submitted. However, an amended report can be filed for any necessary changes to the report.

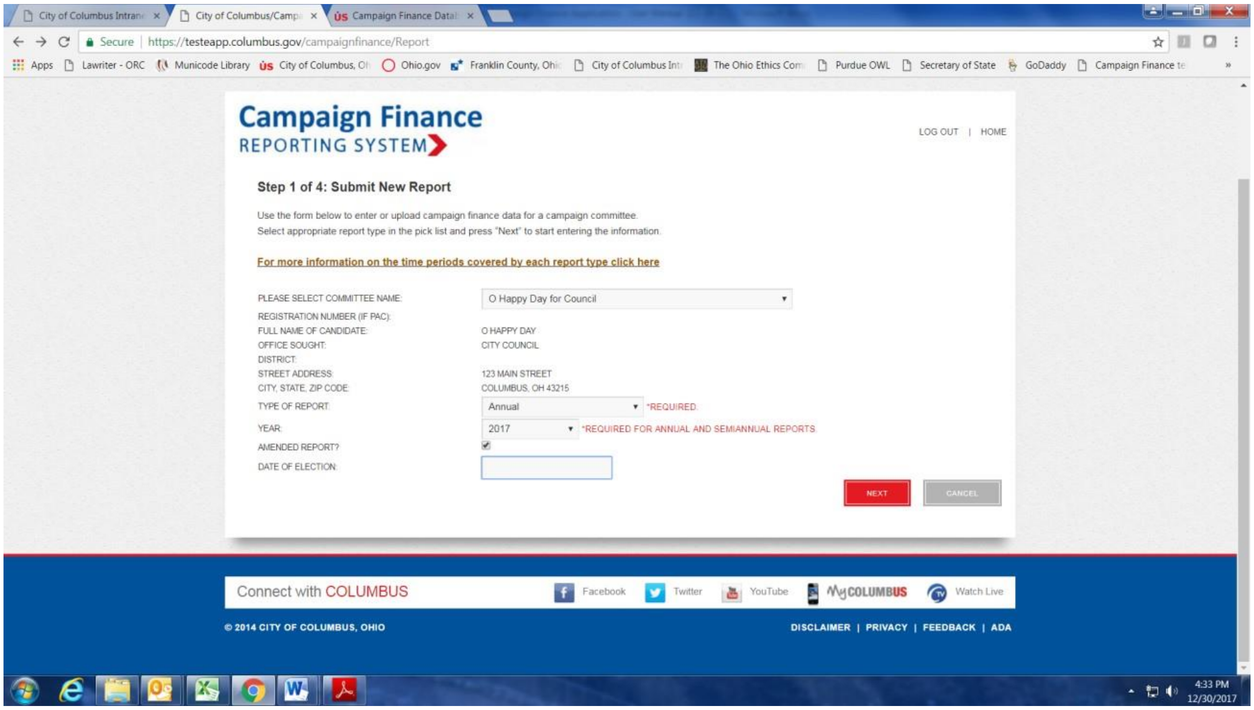
For more information on campaign finance report types, see the document "CITY OF COLUMBUS CAMPAIGN FINANCE REFERENCE GUIDE" on the Columbus Campaign Finance website:

https://www.columbus.gov/WorkArea/DownloadAsset.aspx?id=2147508964

Or see Appendix A of this manual on Page 36.

4. Select the year for the report.

5. If this is an amended report, specify that by clicking on the box for "Amended Report?" Once selected, a checkmark will appear in the box.



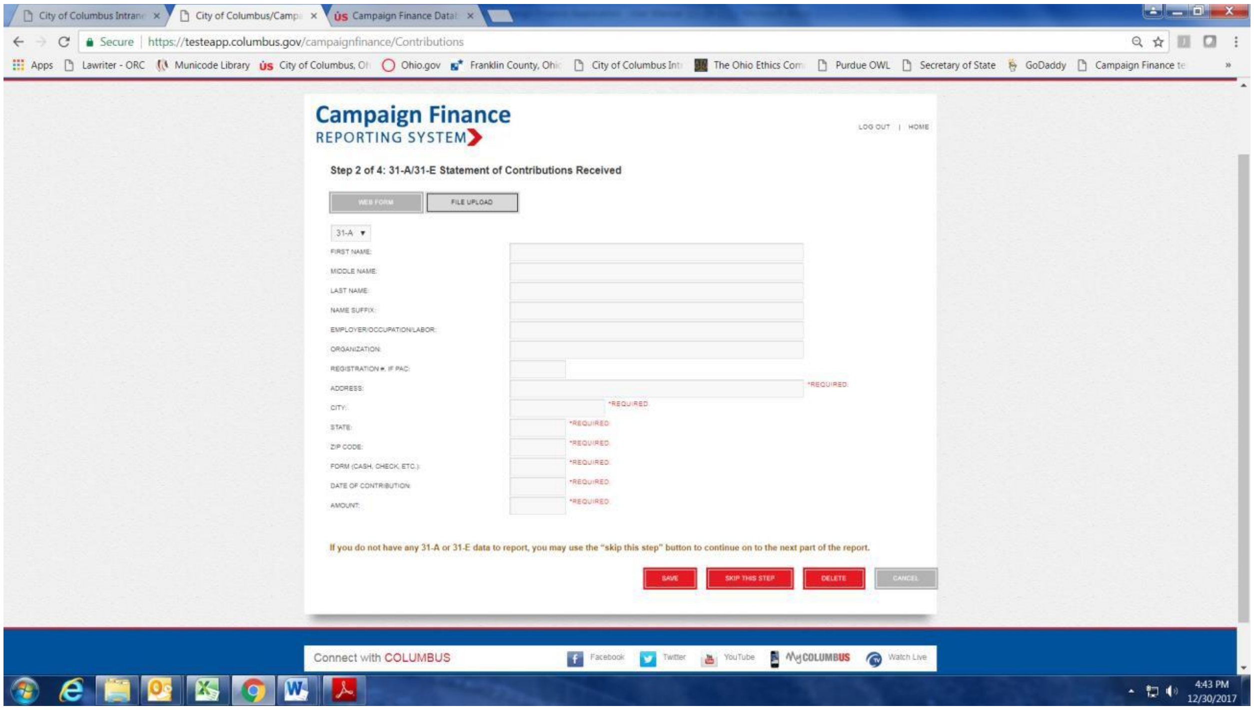
6. If this report is associated with an election, input the date of the election in the “Date of Election” field.

7. Select the “Next” button to continue to the next section.

31-A/31-E Statement of Contributions Received (Step 2)

The Campaign Finance application offers two methods for accepting financial contribution data from a committee:

1. <u>File Upload</u> – Using a template provided by the City of Columbus, a user can import data from a pre-populated template. Click on the gray “FILE UPLOAD” button at the top of the screen to upload data from the City of Columbus Template Form 31A Contributions.



Note: Form 31-A is available on the Campaign Finance website:
https://www.sos.state.oh.us/globalassets/candidates/forms/31a.pdf

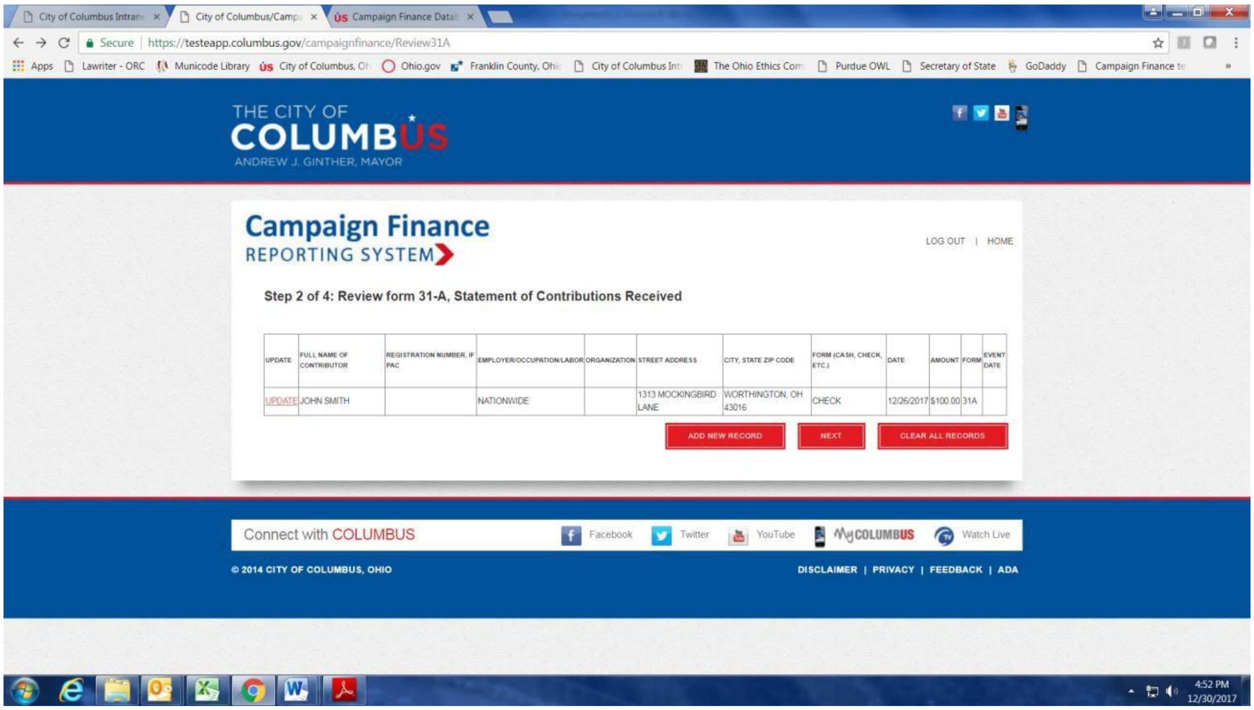
Additional information on use of the Columbus Campaign Finance templates and uploading data from a user's Excel spreadsheet is also available in the document "Campaign Finance Template Instructions," listed as "Template Instructions" on the City Council's Campaign Finance website: https://www.columbus.gov/WorkArea/DownloadAsset.aspx?id=2147508958

2. User Input – This method of reporting data allows the user to manually enter individual contributions. Click on the gray "WEB FORM" button at the top of the screen to manually enter contribution data.

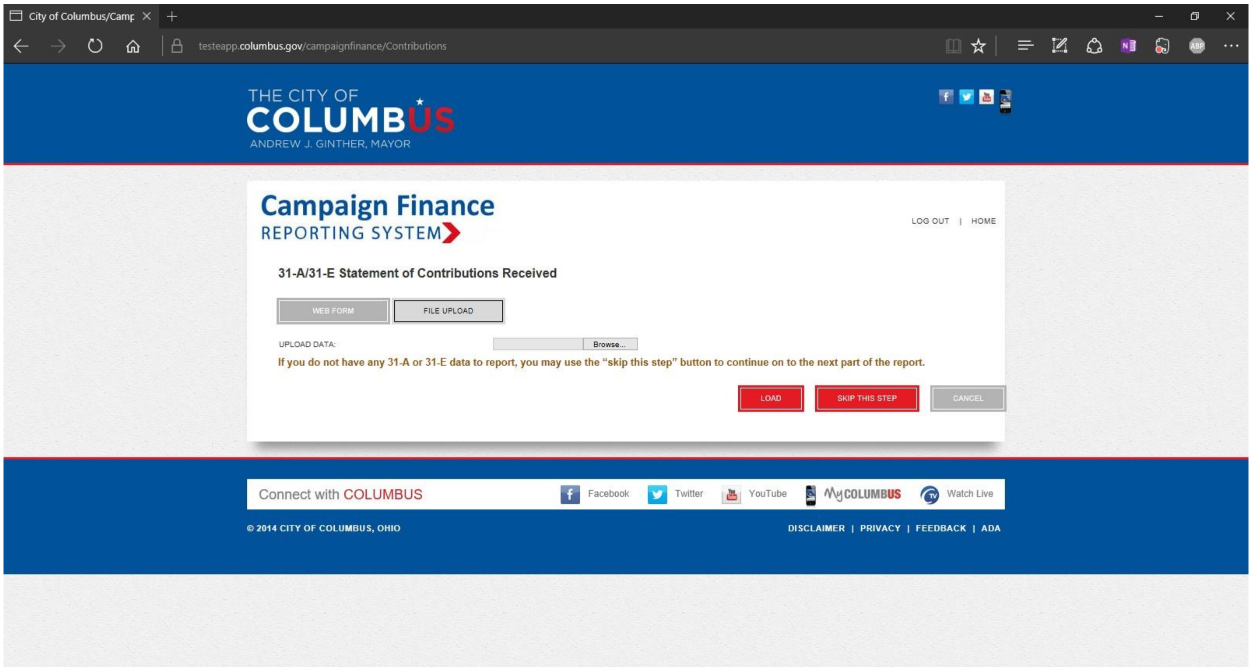
   Data may be entered for each contribution individually; select either 31-A if the contribution is a regular contribution or 31-E if it is associated with a fundraising event.

   After entering each contribution, the information can be edited by clicking on "UPDATE," adding another contribution by clicking on "ADD NEW RECORD," or clicking on

"NEXT" to proceed with entering expenditures. A user may click on "CLEAR ALL RECORDS" to delete all contribution information and start over.



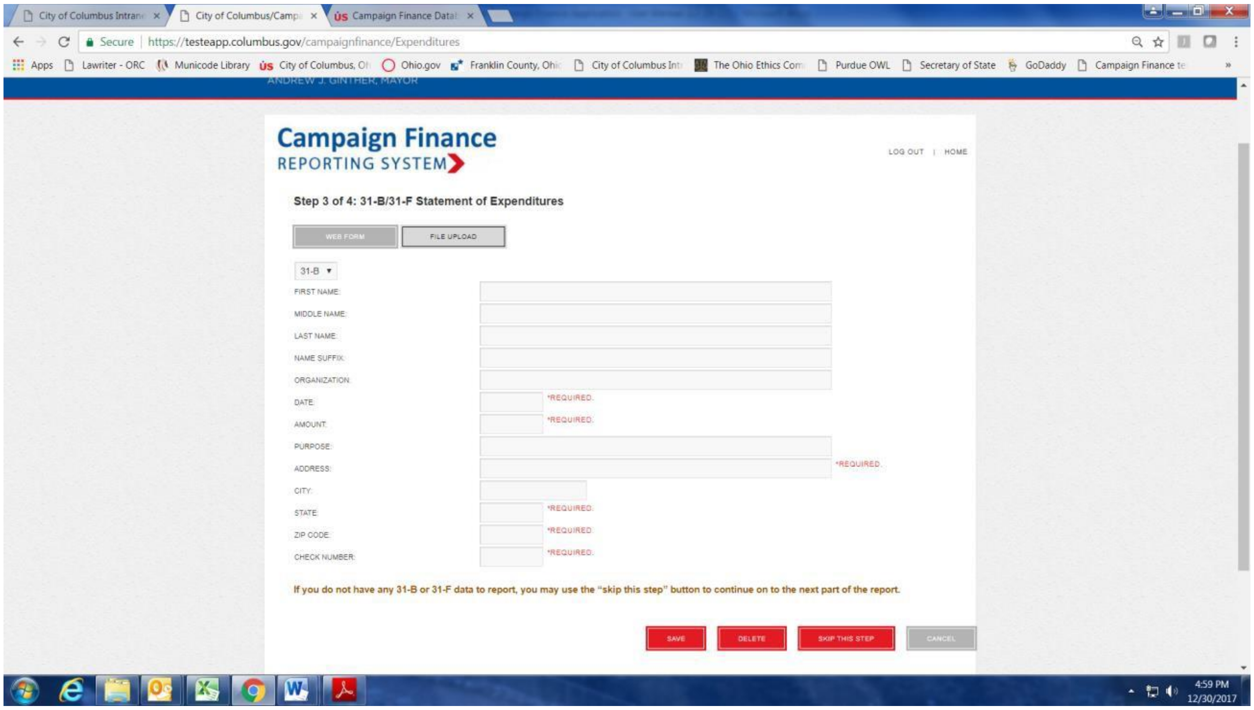
Select the red "**SAVE**" button at the bottom of the screen once all data has been entered or imported. If there is no data for this step, it may be skipped by clicking on the red "**SKIP THIS STEP**" button.



31-B/31-F Statement of Expenditures (Step 3)

The Campaign Finance application offers two methods for accepting financial expenditure data from a committee:

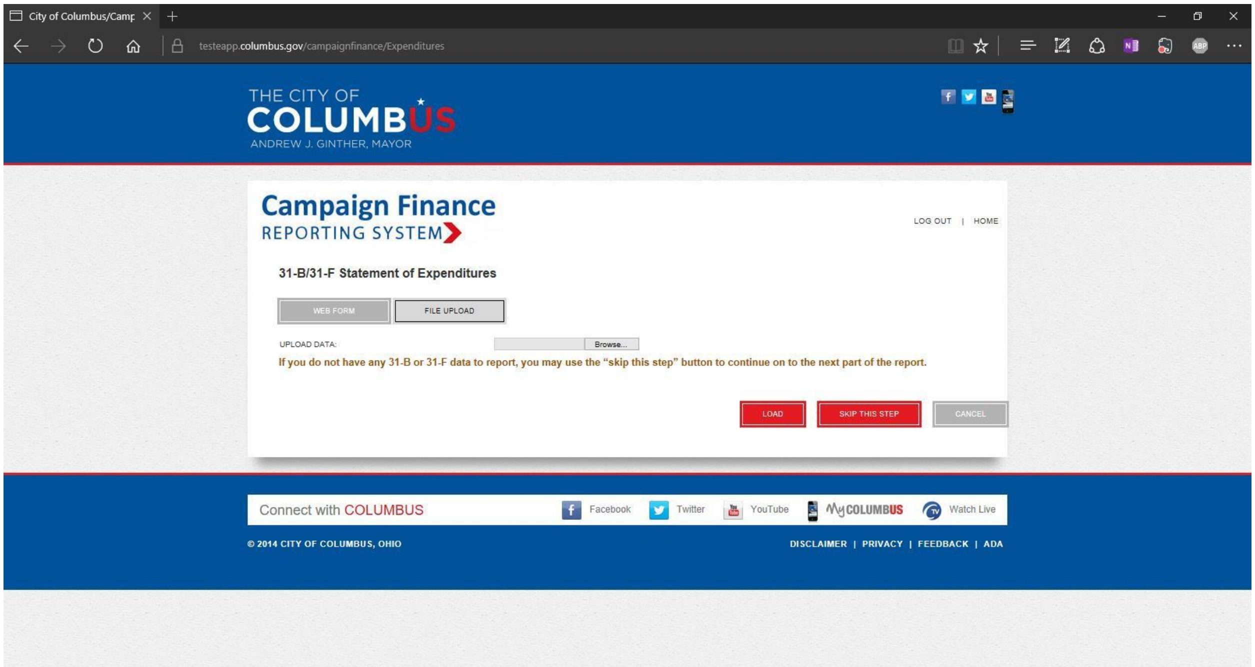
1. File Upload – Using a template provided by the City of Columbus, a reporting user can import data from a pre-populated template. Click on the gray "FILE UPLOAD" button at the top of the screen to upload data from the City of Columbus Template Form 31B Expenditures.



Note: Template Form 31B Expenditures is available on the Campaign Finance website: https://www.sos.state.oh.us/globalassets/candidates/forms/31b.pdf

Additional information on use of the Campaign Finance templates and uploading data from a user's Excel spreadsheet is also available in the document "Campaign Finance Template Instructions," listed as "Template Instructions" on the City Council's Campaign Finance website: https://www.columbus.gov/WorkArea/DownloadAsset.aspx?id=2147508958

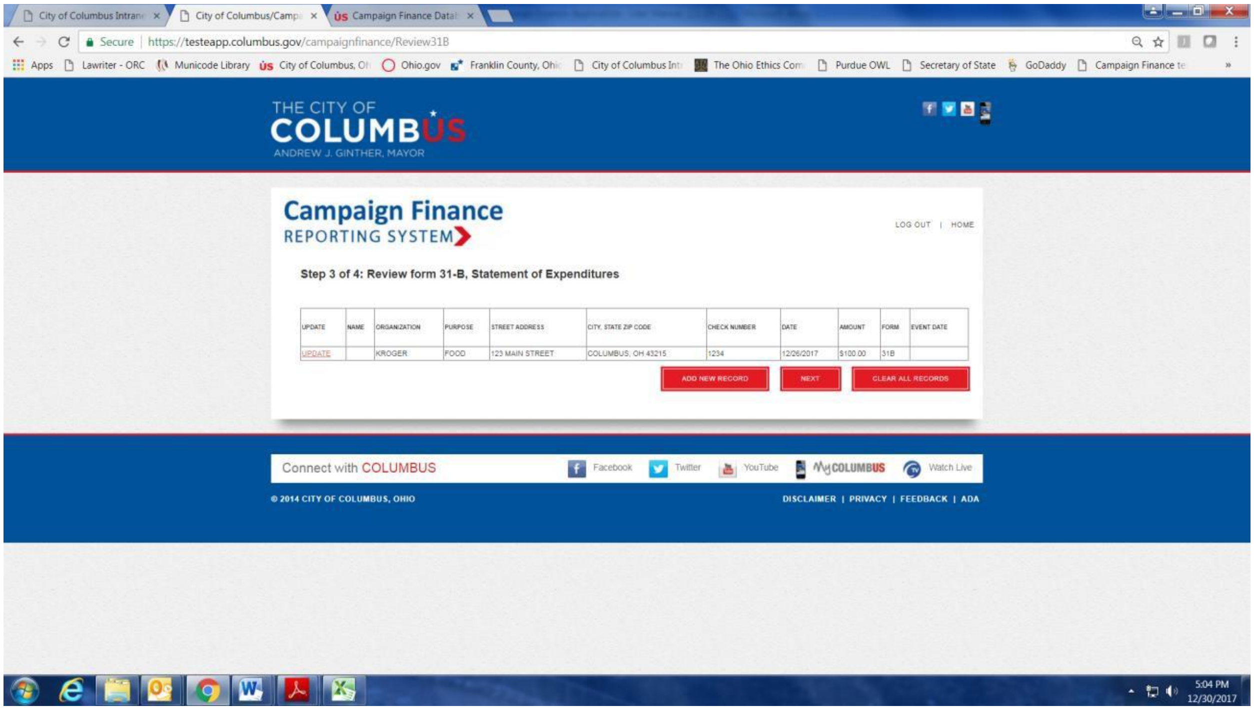
Click on the red "**SAVE**" button once all data has been entered or imported. If there is no data for this step, it may be skipped with the red "**SKIP THIS STEP**" button.



2. <u>User Input</u> – This method allows the reporting user to manually enter expenditures. Click on the gray "WEB FORM" button at the top of the screen to manually enter expenditure data.

   Data may be entered for each expenditure individually; select either 31-B if the expenditure is a regular expenditure or 31-F if it is associated with a fundraising event.

   Following the entry of each expenditure, information can be edited by clicking on "UPDATE," adding another expenditure by clicking on "ADD NEW RECORD," or clicking on "NEXT" to proceed. Click on "CLEAR ALL RECORDS" to delete all expenditure information and start over.



Template Import Method

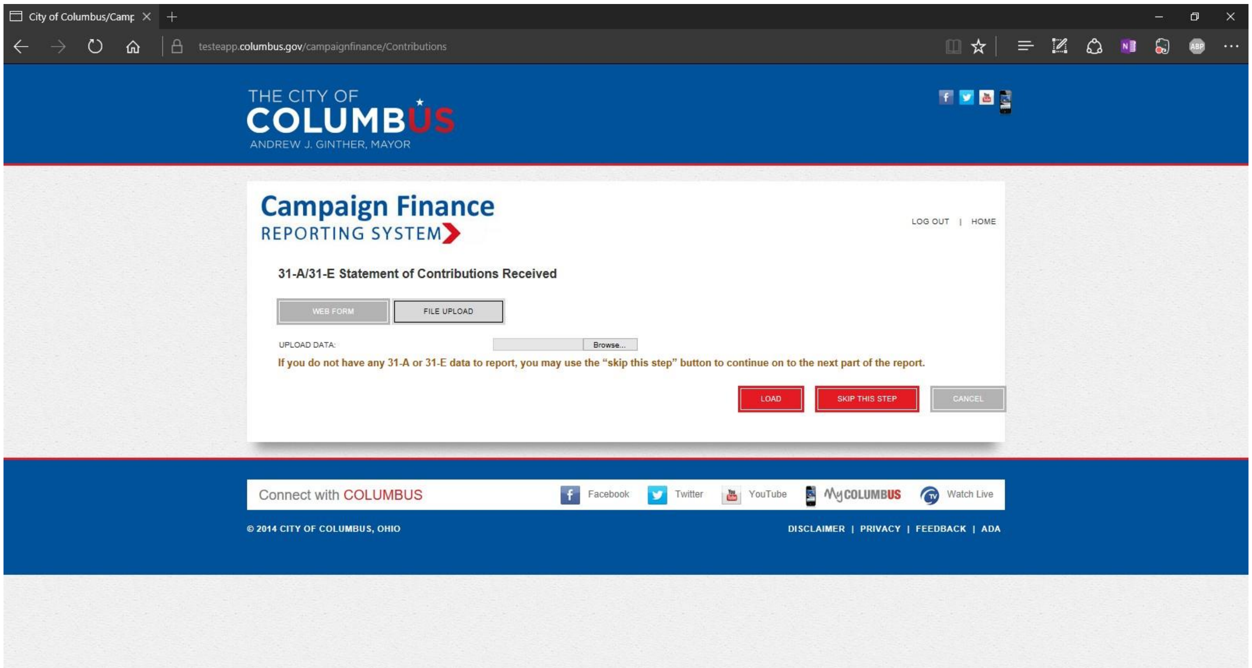
Using a standardized template provided by the City of Columbus, campaign finance data can be easily imported into the Campaign Finance application rather than manually entering each transaction. The spreadsheet user guide can be found in the "Campaign Finance Template Instructions".

Importing data from spreadsheet:

1. Select the "File Upload" button on either the 31A/E or 31B/F page.
2. Select the browse button on the form.
3. Browse to the location for the spreadsheet stored on the user's local computer. Select the file, and select "OPEN" on the dialogue box.
4. The statement screen should now refresh showing the data from the spreadsheet in a table. Review all the data to ensure accuracy. If information is not input as directed, such as an extra space between 31 and E, the information will not auto-populate correctly into the corresponding form.
    a. Upon a successful import, the total number of records will be reported at the top of the table. Ensure that number matches the original spreadsheet that was imported.
    b. If data needs to be edited, select the "Update" link next to the entry that needs correction. This will open up the record in detail and allow all the fields to be changed.

Once the modifications are complete select the "SAVE" button. An entry can be completed deleted by selecting the "DELETE" button on the same page.

5. Select "**SAVE**" once all the data that has been entered is accurate.



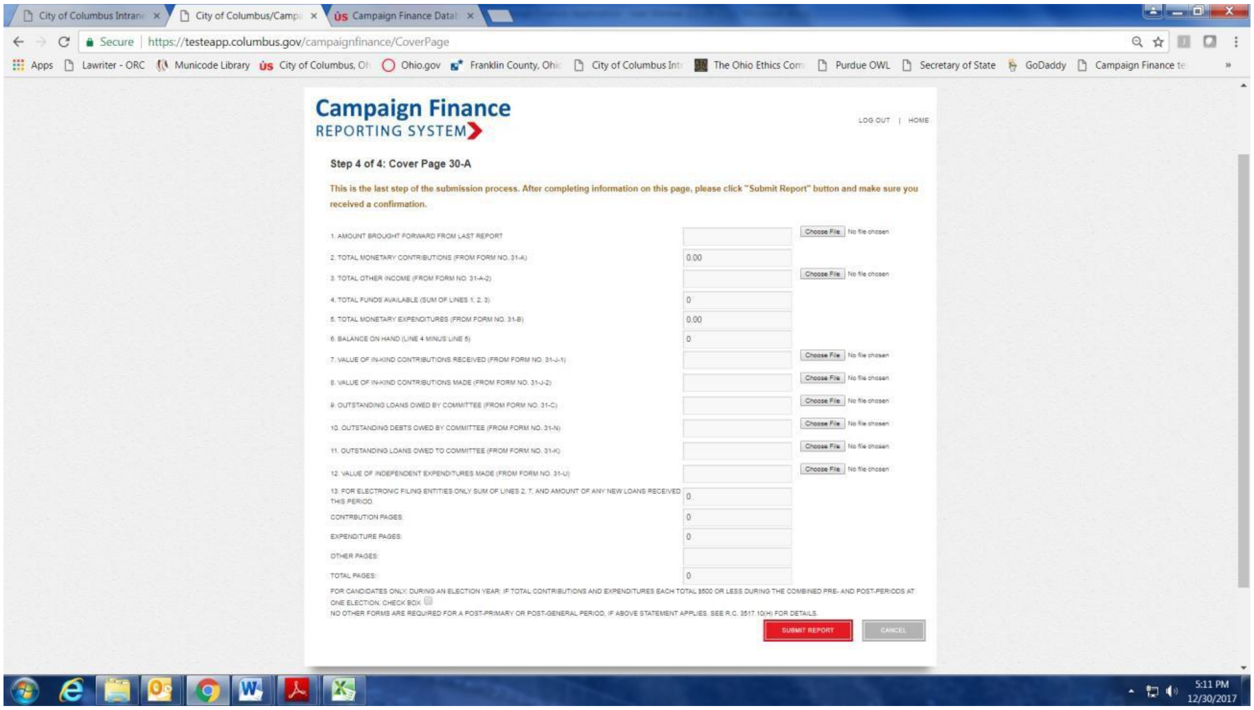
Cover Page 30-A (Step 4)

The next step in campaign finance reporting is entering the data in the Cover Page 30-A, which is the equivalent of Ohio Secretary of State Form 30-A "Ohio Campaign Finance Report" summarizing the data for all contributions and expenditures for the campaign committee for the reporting period.

Data may be manually entered for each field on this page. Data will also auto-populate from all the contribution and expenditure data that has been entered for the reporting period.

Note - Please ensure the numbers entered match the Form 30-A filed with the Franklin County Board of Elections.

PDF files of other Ohio Secretary of State campaign finance forms (such as Form 31-C Outstanding Loans or 31- J-1 for In-Kind Contributions Received) may also be uploaded into the application. For any forms uploaded, manually enter the amount on the corresponding line on the Cover Page 30-A web page.

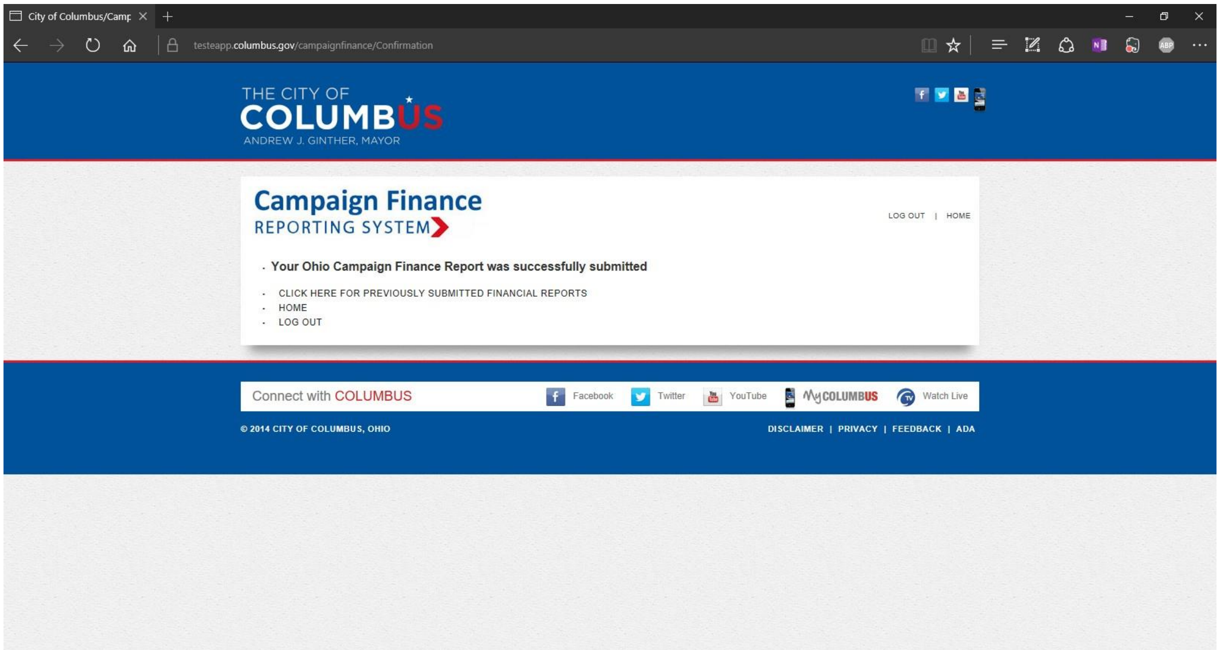


1. Amount brought forward from last report
2. Total monetary contributions (From Form No. 31-A)
3. Total other income (From Form No. 31-A-2)
4. Total funds available (Sum of lines 1, 2, 3)
5. Total monetary expenditures (From Form No. 31-B)
6. Balance on hand (Line 4 minus line 5)
7. Value of in-kind contributions received (From Form No. 31-J-1)
8. Value of in-kind contributions made (From Form No. 31-J-2)
9. Outstanding loans owed by committee (From Form No. 31-C)
10. Outstanding debts owed by committee (From Form No. 31-N)
11. Outstanding loans owed to committee (From Form No. 31-K)
12. Value of independent expenditures made (From Form No. 31-U)
13. For Electronic Filing Entities only Sum of lines 2, 7, and amount of any new loans received this period.
14. Contribution Pages
15. Expenditure Pages
16. Other Pages
17. Total Pages

Once all amounts have been entered correctly and any necessary PDF files uploaded, click on the red "SUBMIT REPORT" button at the bottom of the screen to submit the campaign finance report.

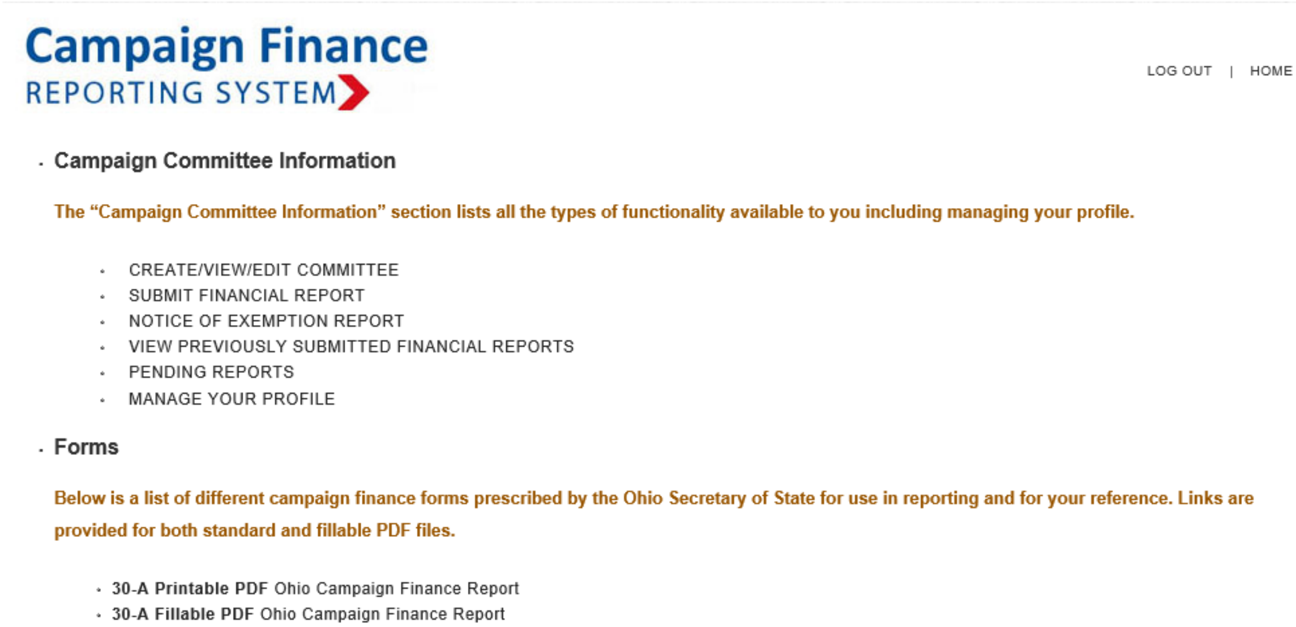
Successful Submission (Step 5)

If the campaign finance report was submitted, the user will receive notice that it was successfully submitted.



Pending Reports

Unfinished campaign finance reports that have not yet been submitted, but have not been deleted, may be accessed by selecting “PENDING REPORTS” from the Campaign Committee Information screen.

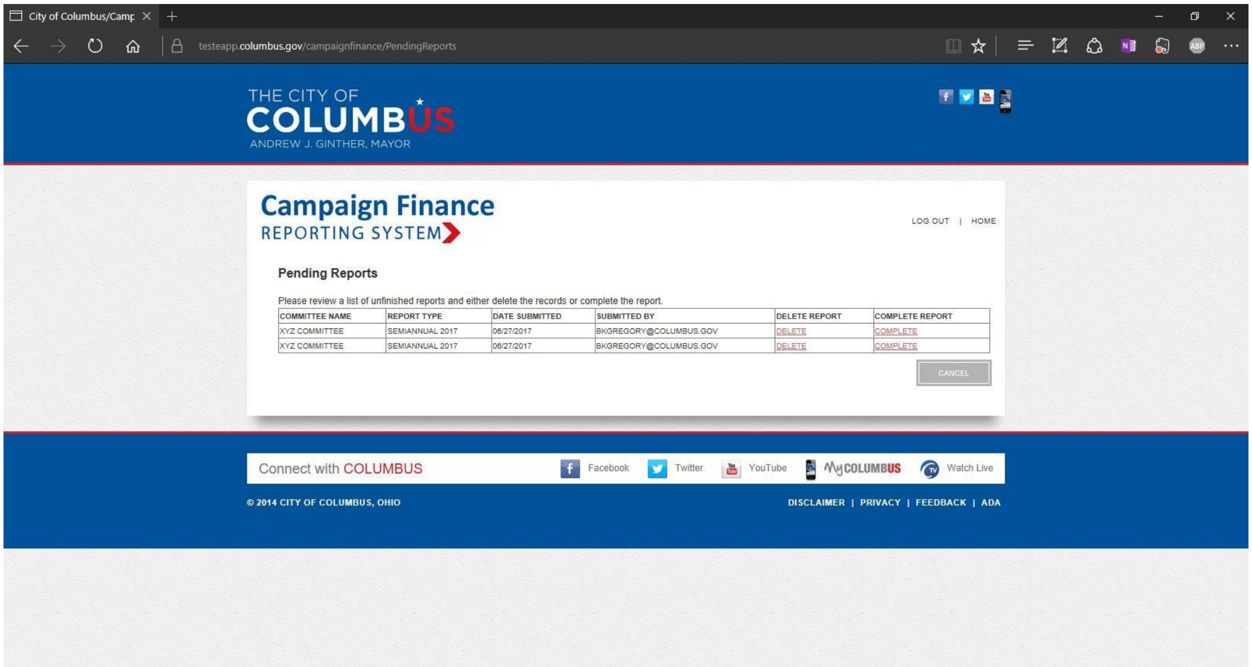


Click on “COMPLETE” to continue entering contribution and expenditure data for the report and to submit it once finished.

Follow the steps for Submitting a Report, starting on Page 22 to enter data for report completion.

Click on “DELETE” to delete the report that has been started but not yet submitted for the reporting period. Once a pending report is deleted, the data cannot be recovered.

A campaign finance report that has already been submitted cannot be deleted later. Instead, an amended report must be filed.



Viewing Historical Data

The user may view (but not edit or delete) previously submitted campaign finance reports by selecting "VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS" from the Campaign Committee Information screen.

THE CITY OF COLUMBUS
CITY COUNCIL

Campaign Finance
REPORTING SYSTEM

LOG OUT | HOME

- **Campaign Committee Information**

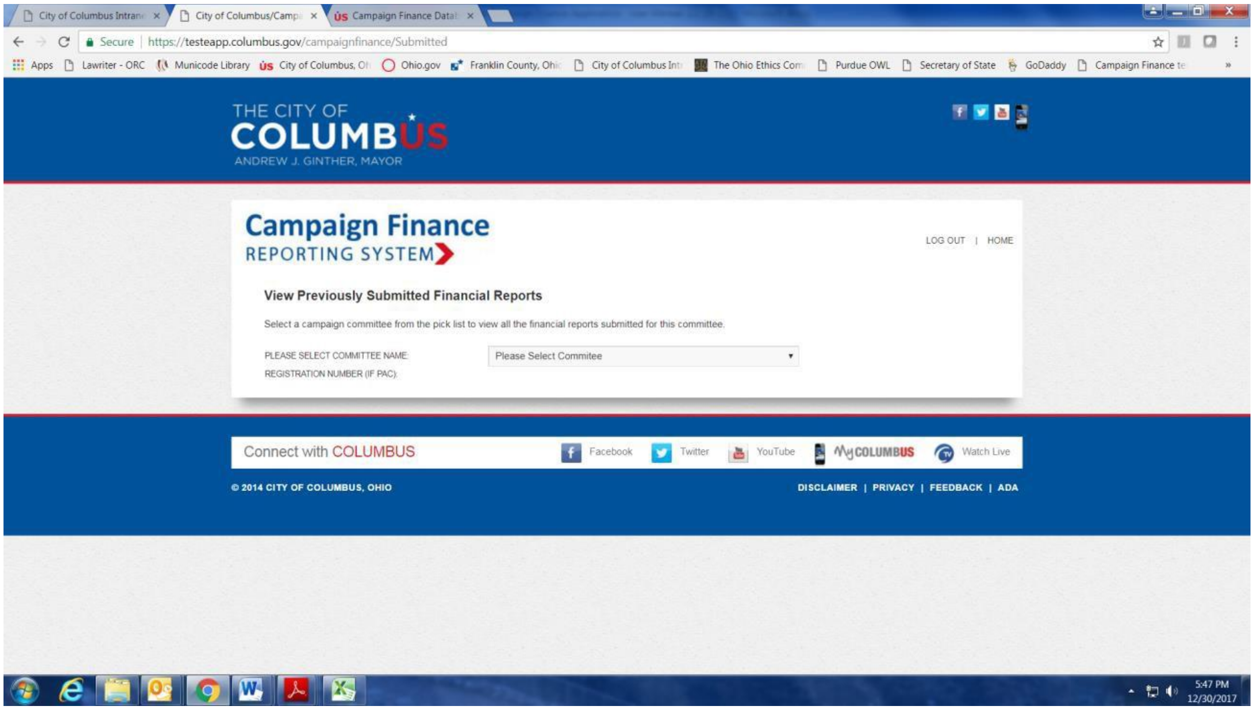
The "Campaign Committee Information" section lists all the types of functionality available to you including managing your profile.

- CREATE/VIEW/EDIT COMMITTEE
- SUBMIT FINANCIAL REPORT
- NOTICE OF EXEMPTION REPORT
- VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
- PENDING REPORTS
- MANAGE YOUR PROFILE

- **Forms**

Below is a list of different campaign finance forms prescribed by the Ohio Secretary of State for use in reporting and for your reference. Links are provided for both standard and fillable PDF files.

- **30-A Printable PDF** Ohio Campaign Finance Report
- **30-A Fillable PDF** Ohio Campaign Finance Report



Select the name of the campaign committee from the pull down menu of campaign committees associated with the user's account to view previously submitted campaign finance reports for that committee.

Getting Support

Please contact Renata Ramsini at (614) 645-7673 or CampaignFinance@columbus.gov with any questions.

For more information on campaign finance reports, please see the Campaign Finance Handbook on the Ohio Secretary of State's website: http://www.sos.state.oh.us/SOS/CampaignFinance/CFHandbook.aspx.