

CAMPAIGN FINANCE APPLICATION

User Manual



January 2, 2018

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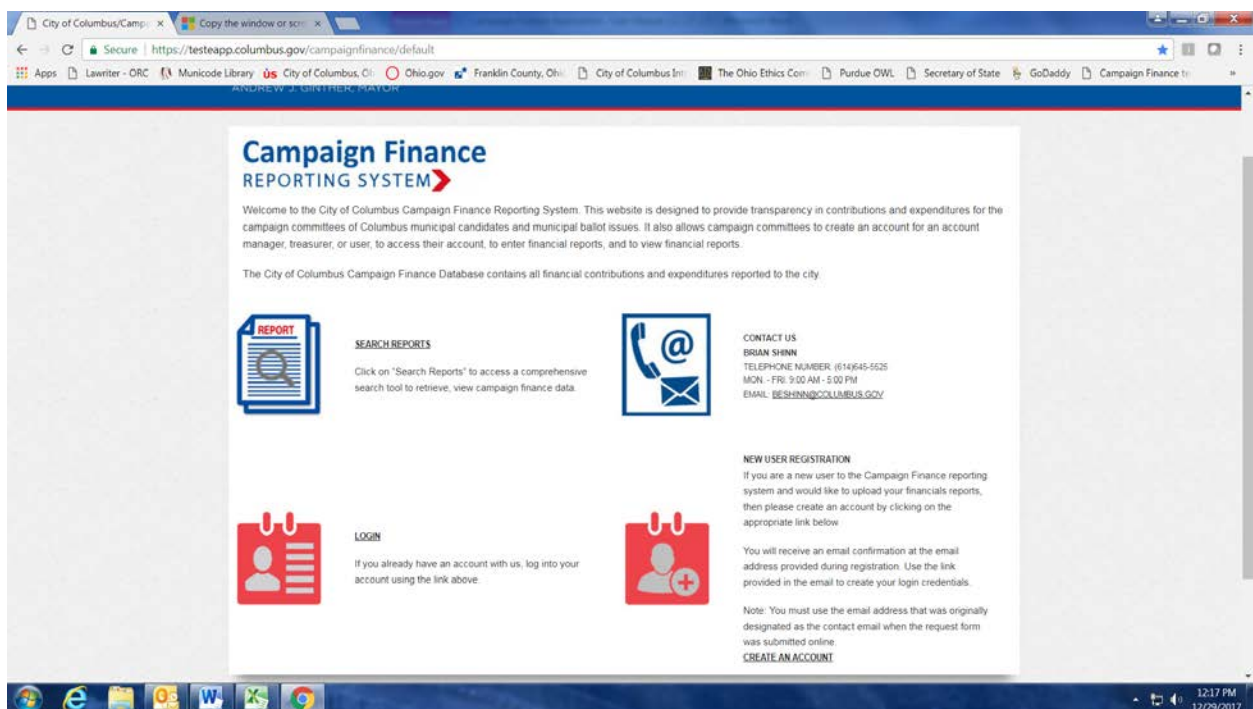
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Account Management

Creating an account is required for financial reporting in the Campaign Finance application with the City of Columbus. Creating an account is a simple step that works similarly to most modern websites you area already familiar with.

Account Creation

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



When you click on the “CREATE AN ACCOUNT” link, the following page appears:

Campaign Finance REPORTING SYSTEM

LOG OUT | HOME

Account Information

Fill out the form below and press "Save" to submit a request to create an Account with the Campaign Finance Reporting System. You will receive an email confirmation at the email address provided during registration. Follow the link in the confirmation email to create your login credentials.

FIRST NAME:	<input type="text"/>	*REQUIRED.
MIDDLE NAME:	<input type="text"/>	
LAST NAME:	<input type="text"/>	*REQUIRED.
ORGANIZATION:	<input type="text"/>	
EMAIL ADDRESS:	<input type="text"/>	*REQUIRED.
ADDRESS:	<input type="text"/>	
CITY:	<input type="text"/>	
STATE:	<input type="text"/>	
ZIP CODE:	<input type="text"/>	
HOME PHONE NUMBER:	<input type="text"/>	
WORK PHONE NUMBER:	<input type="text"/>	
MOBILE PHONE NUMBER:	<input type="text"/>	
BEST WAY TO CONTACT:	<input type="text" value="Any Listed"/>	

SAVE

CLOSE

On the Account Information Page, fill out all required fields (marked ***REQUIRED**) and any relevant optional fields. 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:

Campaign Finance REPORTING SYSTEM

. Your account information was submitted successfully! Please check your emails to setup your account!

. HOME

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.

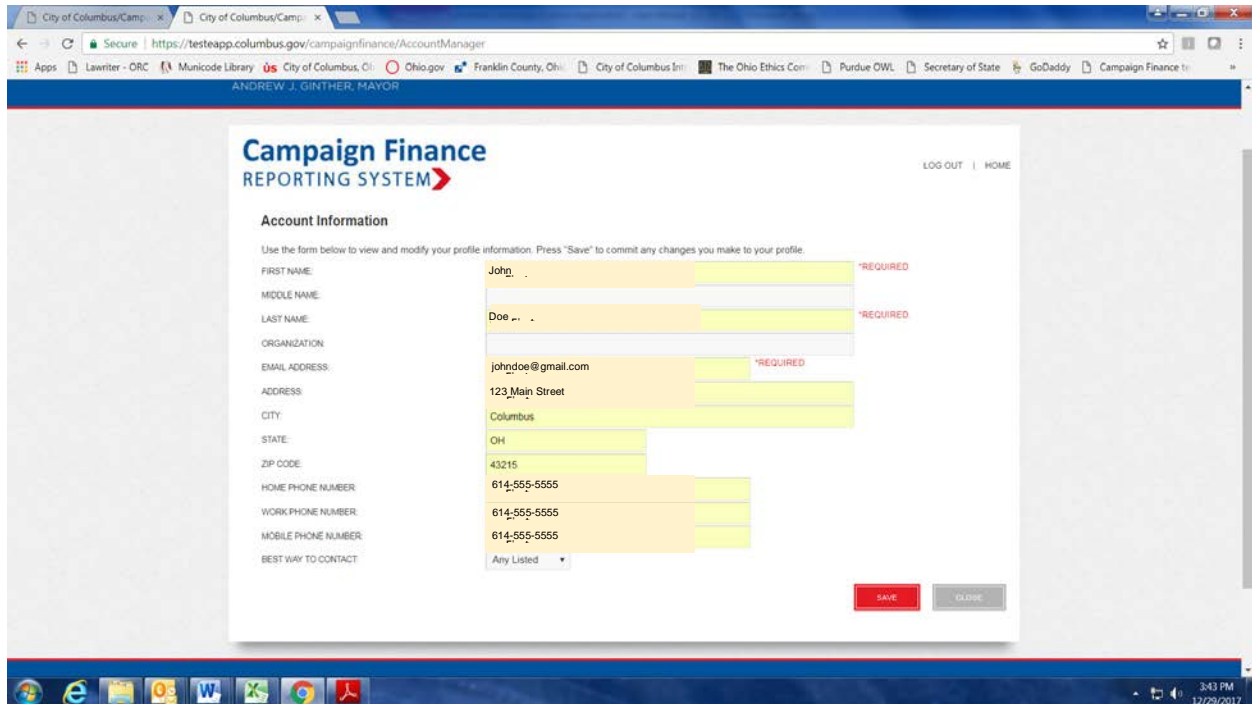
Once your information is submitted successfully, an email will arrive in the user's inbox for the email account supplied in the Account Information form. Click on the link in the email to load a new page asking for the user's email address. The user then must enter a password. The password will need to be confirmed, and both password fields will need to match before the credentials are saved in the Campaign Finance application. Once your account has been created and approved, you may log into the Campaign Finance application to create campaign committees and report campaign finance information (contributions and expenditures).

Updating Account Information

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

The screenshot shows the top navigation bar of the City of Columbus website with the logo and Mayor Andrew J. Ginther's name. Below this is the header for the "Campaign Finance Reporting System" with "LOG OUT | HOME" links. The main content area is titled "Campaign Committee Information" and includes a descriptive paragraph and a list of actions: VIEW/EDIT COMMITTEE, SUBMIT FINANCIAL REPORT, VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS, PENDING REPORTS, and MANAGE YOUR PROFILE. A second section titled "Forms" provides a list of links for "30-A Printable PDF Ohio Campaign Finance Report" and "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

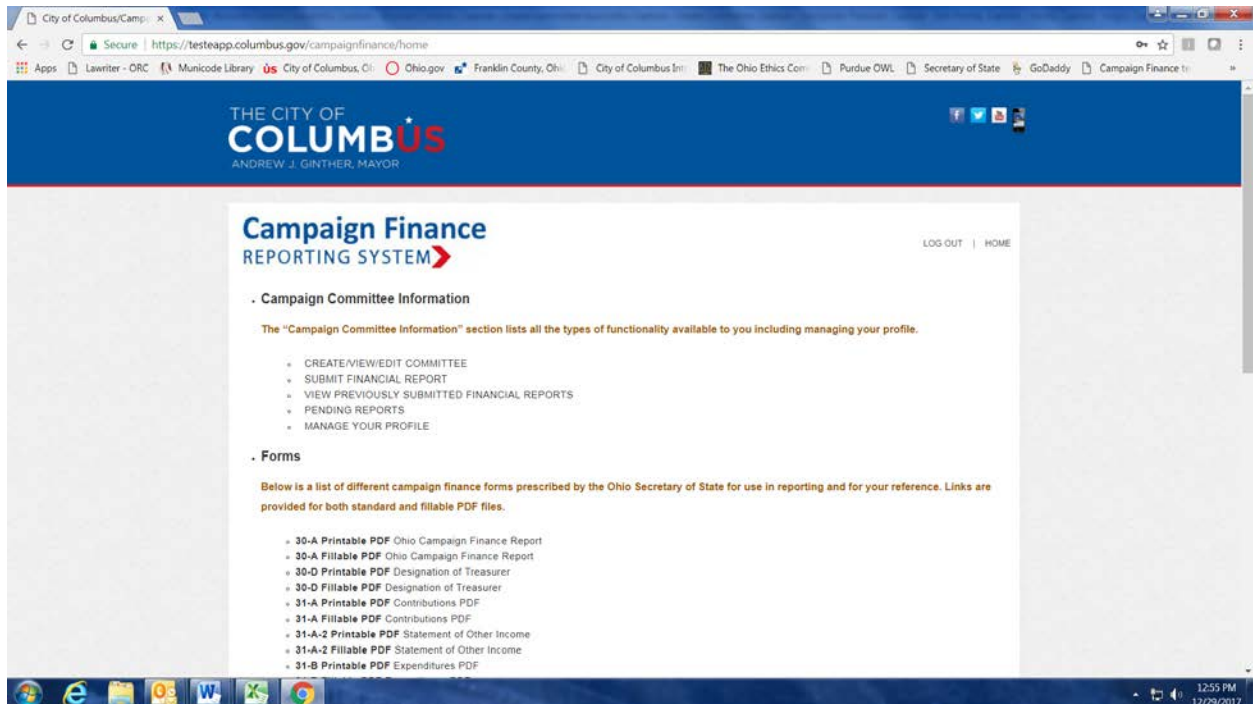
Campaign committees for candidates, ballot issue committees, or political action committees may be registered by anyone who has created an account with the Campaign Finance application.

A registered user who creates a campaign committee for a candidate, ballot issue, or PAC 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/EDITE COMMITTEE” link:



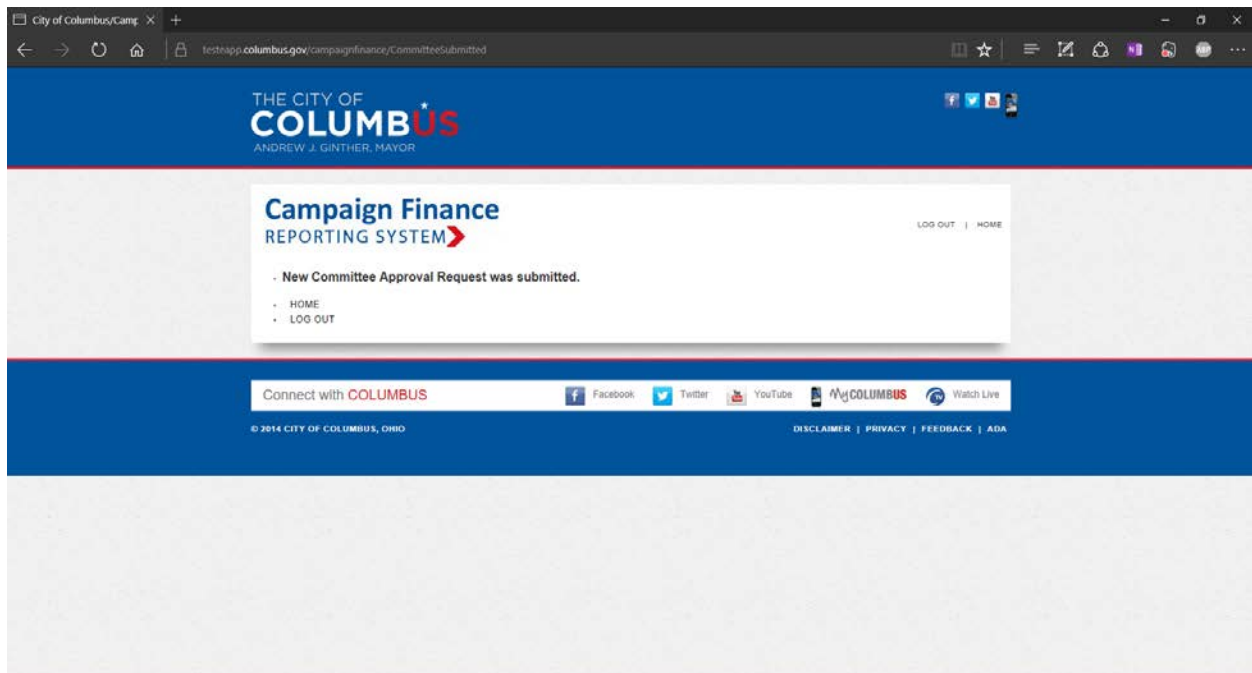
This will load the “Committee Information” page:

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 if we need to contact you)
- 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.

You will receive notification that the New Committee Approval was submitted:

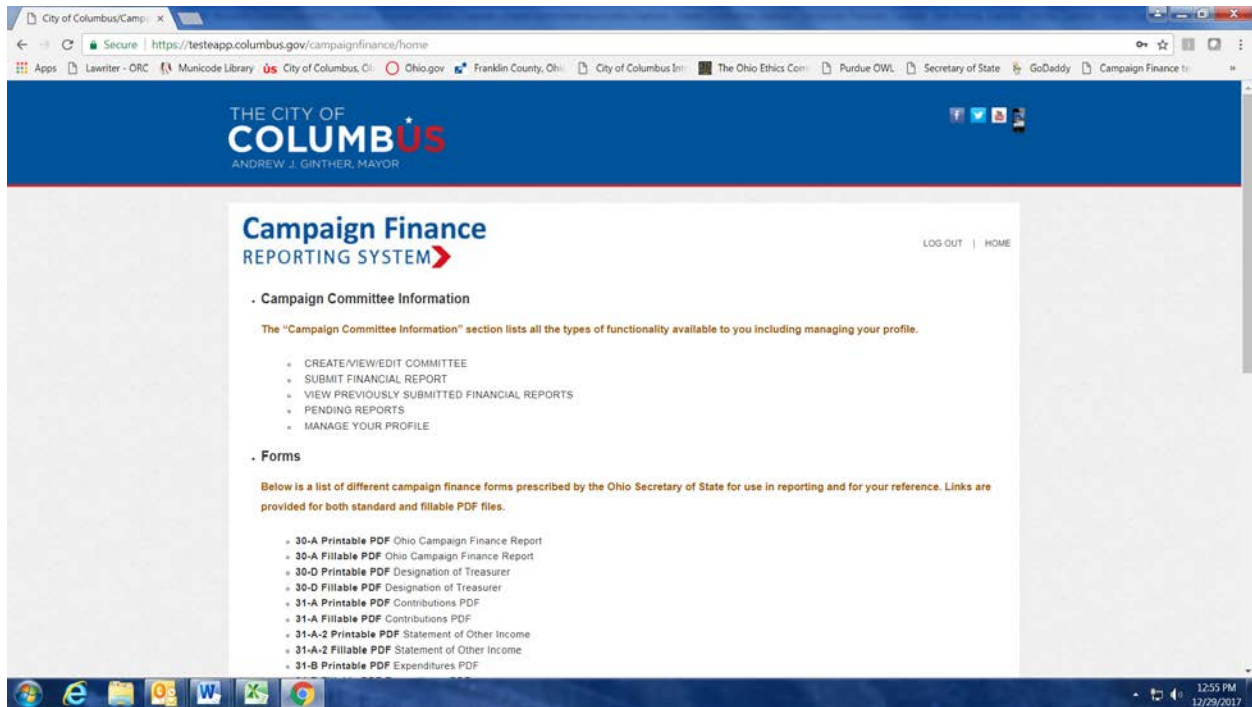


You will also receive a confirmation email at the email address you registered with the system. Our staff will review and approve the committee or contact you if they need additional information, and then you will receive an additional email confirming that the committee has been approved and that you may now add a Treasurer for the campaign committee.

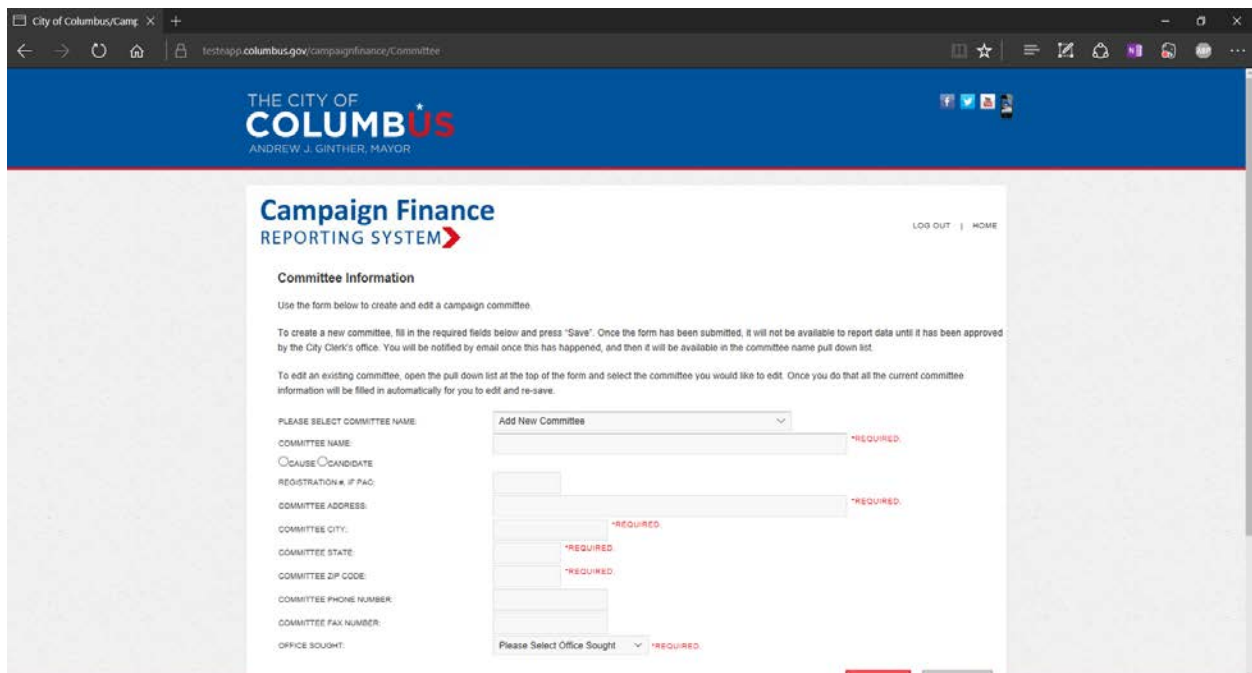
***NOTE: Once the committee has been approved you must designate a registered user as TREASURER for the campaign committee before the system will permit the Account Manager, the Treasurer, or any additional authorized user to submit campaign finance information (contributions and expenditures).**

Committee Editing

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



This will load the “Committee Information” screen:



From the “PLEASE SELECT COMMITTEE NAME” field select the campaign committee you would like to edit from the pull down list of committees associated with your 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 inform you that the committee information was saved successfully. Click on the gray “CLOSE” button at the bottom right of the screen to exit that screen.

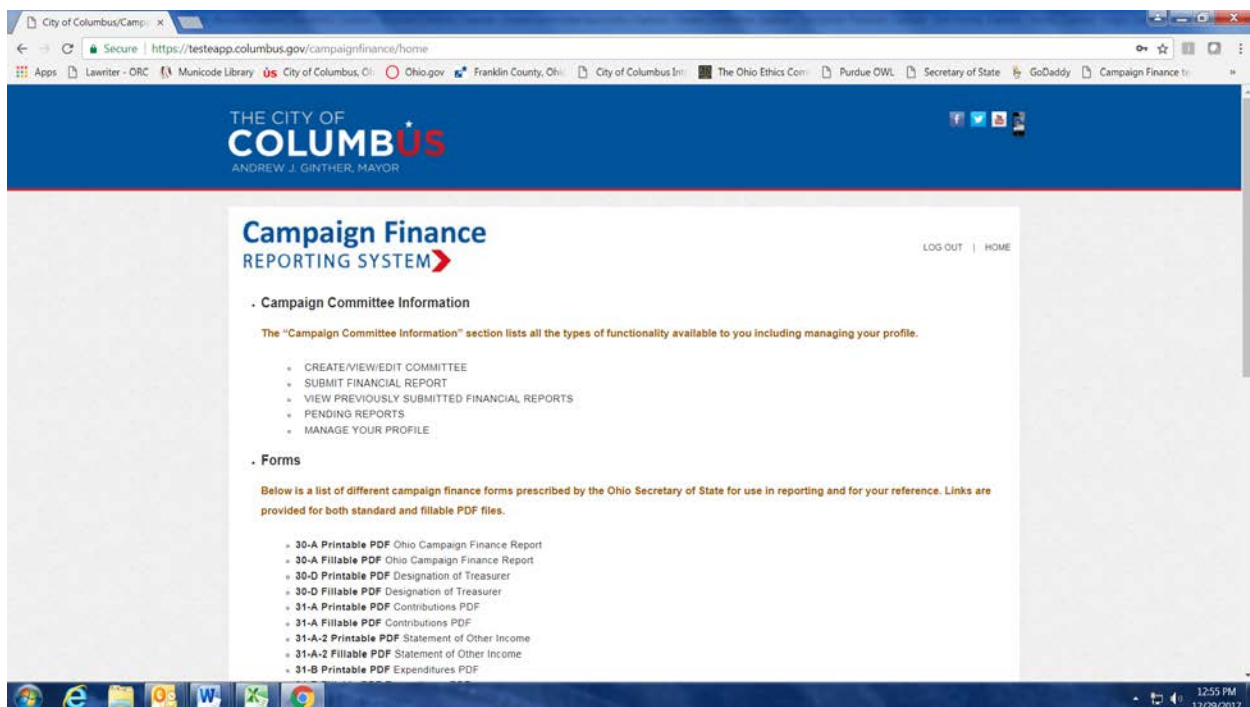
Designating a Treasurer

Once a committee has been created and approved, you **MUST** designate a registered user as Treasurer 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:

The screenshot shows a web browser window displaying the 'Committee Information' form in the Campaign Finance Reporting System. The browser's address bar shows the URL 'testapp.columbus.gov/campaignfinance/Committee'. The page header includes the City of Columbus logo and the name of the Mayor, Andrew J. Ginther. The form itself is titled 'Committee Information' and includes instructions for creating and editing committees. It features a dropdown menu for 'PLEASE SELECT COMMITTEE NAME' with 'Add New Committee' selected. Below this are several text input fields for 'COMMITTEE NAME', 'REGISTRATION # IF PAC', 'COMMITTEE ADDRESS', 'COMMITTEE CITY', 'COMMITTEE STATE', 'COMMITTEE ZIP CODE', 'COMMITTEE PHONE NUMBER', and 'COMMITTEE FAX NUMBER'. A final dropdown menu for 'OFFICE SOUGHT' is also present. Red asterisks and the word '*REQUIRED' are placed next to the dropdown menu and several of the text input fields to indicate they are mandatory. At the bottom of the form, there are two buttons: a red one and a grey one.

Select the name of the committee for which you want 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 for which you want to designate a Treasurer 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”:

Campaign Finance REPORTING SYSTEM

Committee Information

Use the form below to create and edit a campaign committee.

To create a new committee, fill in the required fields below and press "Save". Once the form has been submitted, it will not be available to report data until it has been approved by the City Clerk's office. You will be notified by email once this has happened, and then it will be available in the committee name put down list.

To edit an existing committee, open the put down list at the top of the form and select the committee you would like to edit. Once you do that all the current committee information will be filled in automatically for you to edit and re-save.

PLEASE SELECT COMMITTEE NAME: Committee Name *REQUIRED

COMMITTEE NAME: *REQUIRED

CAUSE / CANDIDATE:

REGISTRATION # / P. FAC.:

NAME OF CANDIDATE: *REQUIRED

CANDIDATE'S PARTY AFFILIATION:

CANDIDATE'S ADDRESS:

CANDIDATE'S CITY:

CANDIDATE'S STATE:

CANDIDATE'S ZIP:

CANDIDATE'S BUREAU/DISTRICT:

ELECTION YEAR:

COMMITTEE ADDRESS: 123 Main Street *REQUIRED

COMMITTEE CITY: Columbus *REQUIRED

COMMITTEE STATE: OH *REQUIRED

COMMITTEE ZIP CODE: 43215 *REQUIRED

COMMITTEE PHONE NUMBER:

COMMITTEE FAX NUMBER:

OFFICE SOUGHT: City Council *REQUIRED

STATUS:

STATUS COMMENTS:

Buttons: ADD NEW USER, DESIGNATE TREASURER, SAVE, CLOSE

System tray: 2:45 PM 12/29/2017

The "Treasurer Information" page will load for the Committee:

Campaign Finance REPORTING SYSTEM

Treasurer Information for: Committee Name

In order to designate a treasurer, the person you wish to designate must already have a Treasurer account created with the City of Columbus. Enter the email address they registered with into the email box below and press search. If the email address you entered matches a registered account their information will display below.

SAME AS ACCOUNT MANAGER

EMAIL ADDRESS: SEARCH

FIRST NAME:

MIDDLE NAME:

LAST NAME:

ADDRESS: *REQUIRED

CITY: *REQUIRED

STATE: *REQUIRED

ZIP CODE: *REQUIRED

CONTACT PHONE NUMBER: *REQUIRED

FAX NUMBER:

DESIGNATION OF TREASURER 30-D:

Buttons: CREATE 30-D, CHANGE TREASURER, CLOSE

System tray: 2:49 PM 12/29/2017

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 you input 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.

The screenshot shows a web browser window with the URL `testapp.columbus.gov/campaignfinance/treasurer`. The page header features the City of Columbus logo and the text "THE CITY OF COLUMBUS ANDREW J. GINTHER, MAYOR". The main content area is titled "Campaign Finance REPORTING SYSTEM" and includes a "LOG OUT | HOME" link. The section is "Treasurer Information for XYZ Committee".

Treasurer Information for XYZ Committee

In order to designate a treasurer, the person you wish to designate must already have a Treasurer account created with the City of Columbus. Enter the email address they registered with into the email box below and press search. If the email address you entered matches a registered account their information will display below.

SAME AS ACCOUNT MANAGER

EMAIL ADDRESS:

FIRST NAME:

MIDDLE NAME:

LAST NAME:

ADDRESS: *REQUIRED

CITY: *REQUIRED

STATE: *REQUIRED

ZIP CODE: *REQUIRED

CONTACT PHONE NUMBER: *REQUIRED

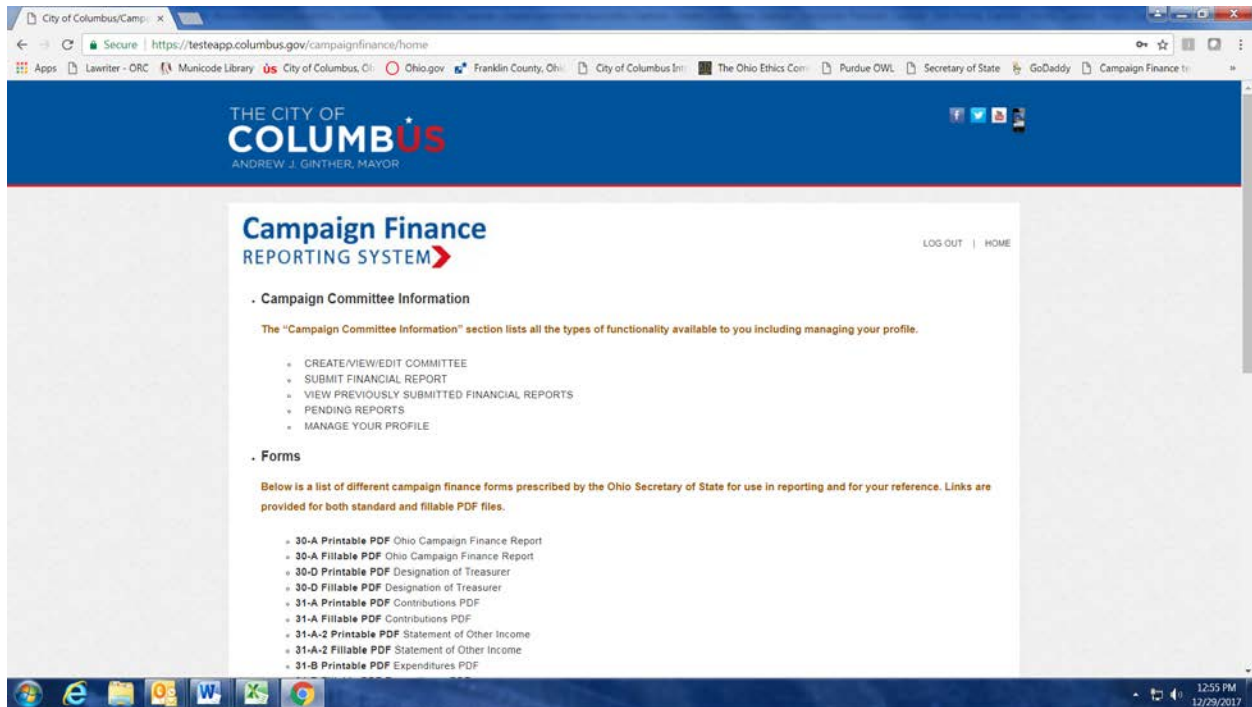
FAX NUMBER:

DESIGNATION OF TREASURER 30-D:

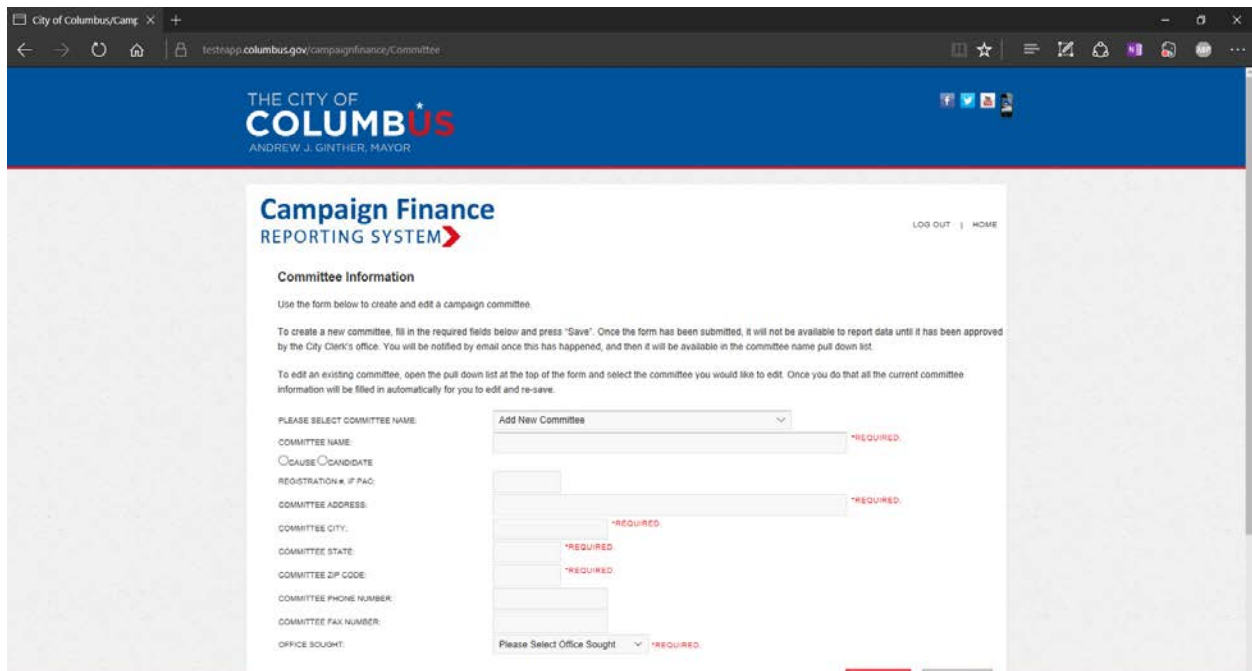
Additional User Management

If desired, Account Managers and Treasurers may add additional users to a committee to give additional people 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:



This will load the “Committee Information” screen:



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

Once the information for that committee for which you want to add a user 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:

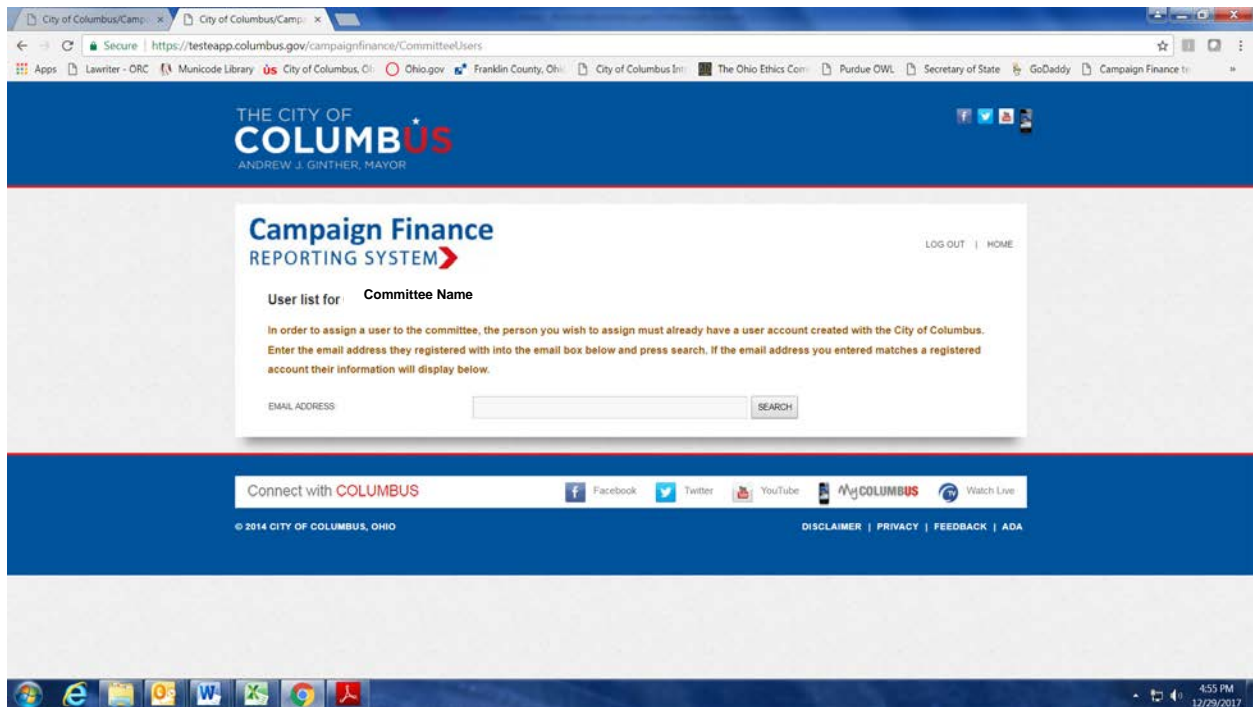
The screenshot displays the 'Campaign Finance REPORTING SYSTEM' interface. The main heading is 'Committee Information'. Below the heading, there are instructions: 'Use the form below to create and edit a campaign committee. To create a new committee, fill in the required fields below and press "Save". Once the form has been submitted, it will not be available to report data until it has been approved by the City Clerk's office. You will be notified by email once this has happened, and then it will be available in the committee name pull-down list. To edit an existing committee, open the pull-down list at the top of the form and select the committee you would like to edit. Once you do that all the current committee information will be filled in automatically for you to edit and re-save.'

The form includes the following fields and sections:

- PLEASE SELECT COMMITTEE NAME:** A dropdown menu with 'Committee Name' selected.
- COMMITTEE NAME:** A text input field with 'Committee Name' entered.
- REGISTRATION # (FAC):** A text input field.
- NAME OF CANDIDATE:** A text input field.
- CANDIDATE'S PARTY AFFILIATION:** A text input field.
- CANDIDATE'S ADDRESS:** A text input field.
- CANDIDATE'S CITY:** A text input field.
- CANDIDATE'S STATE:** A text input field.
- CANDIDATE'S ZIP:** A text input field.
- CANDIDATE'S SUBDIVISION/DISTRICT:** A text input field.
- ELECTION YEAR:** A text input field.
- COMMITTEE ADDRESS:** A text input field with '123 Main Street' entered.
- COMMITTEE CITY:** A text input field with 'Columbus' entered.
- COMMITTEE STATE:** A text input field with 'OH' entered.
- COMMITTEE ZIP CODE:** A text input field with '43215' entered.
- COMMITTEE PHONE NUMBER:** A text input field.
- COMMITTEE FAX NUMBER:** A text input field.
- OFFICE SOUGHT:** A dropdown menu with 'City Council' selected.
- STATUS:** A dropdown menu with 'APPROVED' selected.
- STATUS COMMENTS:** A text input field.

At the bottom of the form, there are four buttons: 'ASSIGN A USER' (red), 'DESIGNATE TREASURER' (red), 'SAVE' (red), and 'CLOSE' (grey).

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 them.

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

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.

The screenshot shows a web browser window displaying the 'Campaign Finance REPORTING SYSTEM' interface. The page title is 'Committee Information'. Below the title, there are instructions: 'Use the form below to create and edit a campaign committee.' and 'To create a new committee, fill in the required fields below and press "Save". Once the form has been submitted, it will not be available to report data until it has been approved by the City Clerk's office. You will be notified by email once this has happened, and then it will be available in the committee name pull down list.' and 'To edit an existing committee, open the pull down list at the top of the form and select the committee you would like to edit. Once you do that all the current committee information will be filled in automatically for you to edit and re-save.'

The form contains the following fields and labels:

- PLEASE SELECT COMMITTEE NAME: Committee Name (dropdown menu)
- COMMITTEE NAME: Committee Name (text input, marked *REQUIRED)
- COMMITTEE NAME: Committee Name (text input, marked *REQUIRED)
- REGISTRATION # IF PAC: (text input)
- NAME OF CANDIDATE: (text input)
- CANDIDATE'S PARTY AFFILIATION: (text input)
- CANDIDATE'S ADDRESS: (text input)
- CANDIDATE'S CITY: (text input)
- CANDIDATE'S STATE: (text input)
- CANDIDATE'S ZIP: (text input)
- CANDIDATE'S SUBDIVISION/DISTRICT: (text input)
- ELECTION YEAR: 0 (text input)
- COMMITTEE ADDRESS: 123 Main Street (text input, marked *REQUIRED)
- COMMITTEE CITY: Columbus (text input, marked *REQUIRED)
- COMMITTEE STATE: OH (text input, marked *REQUIRED)
- COMMITTEE ZIP CODE: 43215 (text input, marked *REQUIRED)
- COMMITTEE PHONE NUMBER: (text input)
- COMMITTEE FAX NUMBER: (text input)
- OFFICE SOUGHT: City Council (dropdown menu, marked *REQUIRED)
- STATUS: (text input)
- STATUS COMMENTS: (text input)

At the bottom of the form, there are four buttons: 'ASSIGN A USER', 'DESIGNATE TREASURER', 'SAVE', and 'CANCEL'. The 'ASSIGN A USER' button is highlighted in red.

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.

The screenshot shows a web browser window displaying the Campaign Finance Reporting System. The page title is "Campaign Finance REPORTING SYSTEM" with "LOG OUT" and "HOME" links. Below the title is a section titled "User list for Committee Name". A message states: "In order to assign a user to the committee, the person you wish to assign must already have a user account created with the City of Columbus. Enter the email address they registered with into the email box below and press search. If the email address you entered matches a registered account their information will display below." There is a search form with "EMAIL ADDRESS" and a "SEARCH" button. Below the search form is a table with the heading "USER WAS ASSIGNED TO THE COMMITTEE". The table has columns for "EMAIL", "NAME", "ADDRESS", and "PHONE#". One row is visible with "johndoe@gmail.com" in the email column and "John Doe" in the name column. To the right of the "John Doe" entry is a gray button labeled "Remove User".

4. Click on the gray "Remove User" button to the right of the user's email address and name to remove them from having access for the campaign committee.

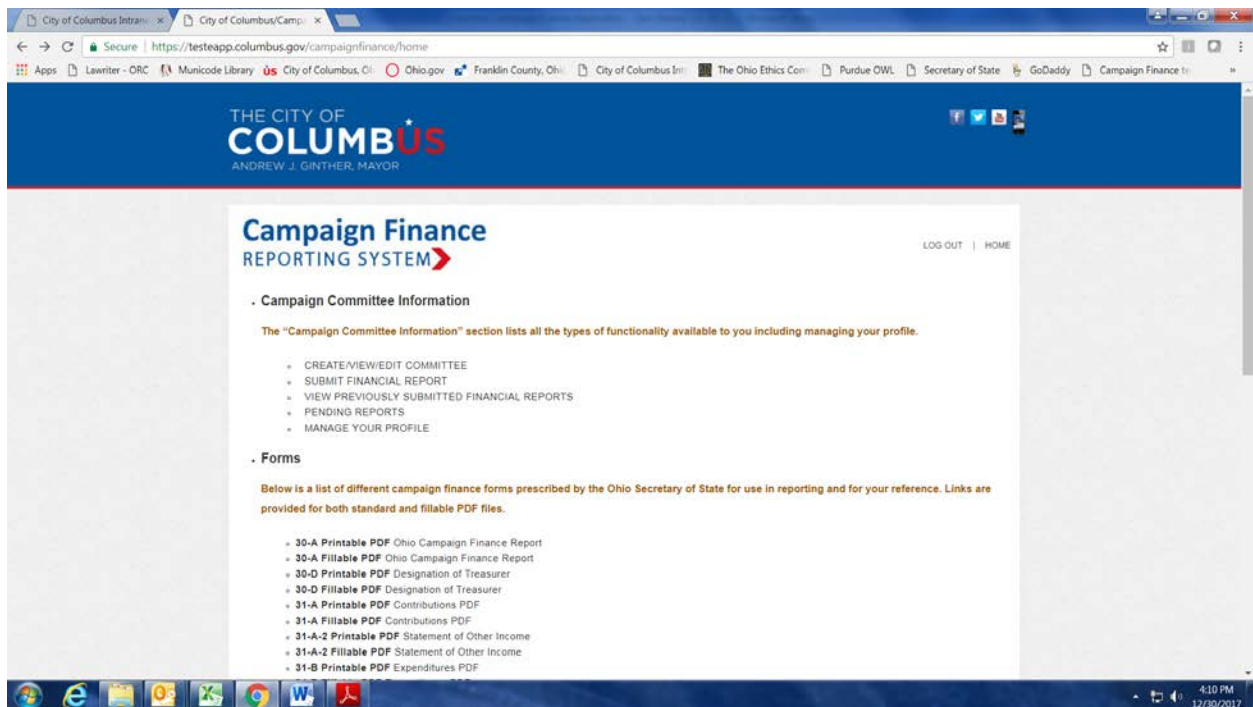
Campaign Finance Reporting

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 that will walk you through all required information to complete a report. You do not need to finish a report at the time it is started. It can be started and continued 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:



2. In the “Please Select Committee Name” field on the “Submit New Report” page select from the pull down menu the committee that the report is for.

The screenshot shows a web browser window with the URL <https://testapp.columbus.gov/campaignfinance/Report>. The page header features the City of Columbus logo and the name of the Mayor, Andrew J. Ginther. The main content area is titled "Campaign Finance REPORTING SYSTEM" and includes a "LOG OUT | HOME" link. The current step is "Step 1 of 4: Submit New Report". Below this, there is a brief instruction: "Use the form below to enter or upload campaign finance data for a campaign committee. Select appropriate report type in the pick list and press 'Next' to start entering the information." A link for more information on time periods is provided. The form fields are as follows: "PLEASE SELECT COMMITTEE NAME" with a dropdown menu showing "Please Select Committee"; "REGISTRATION NUMBER (IF PAC):", "FULL NAME OF CANDIDATE:", "OFFICE SOUGHT:", "DISTRICT:", "STREET ADDRESS:", "CITY, STATE, ZIP CODE:"; "TYPE OF REPORT:" with a dropdown menu showing "Report Type" and a red asterisk indicating it is required; "YEAR:" with a dropdown menu showing "2017" and a red asterisk indicating it is required for annual and semiannual reports; "AMENDED REPORT?" with an unchecked checkbox; and "DATE OF ELECTION:" with an empty text input field. At the bottom right of the form, there are "NEXT" and "CANCEL" buttons. The Windows taskbar at the bottom shows the system time as 4:22 PM on 12/30/2017.

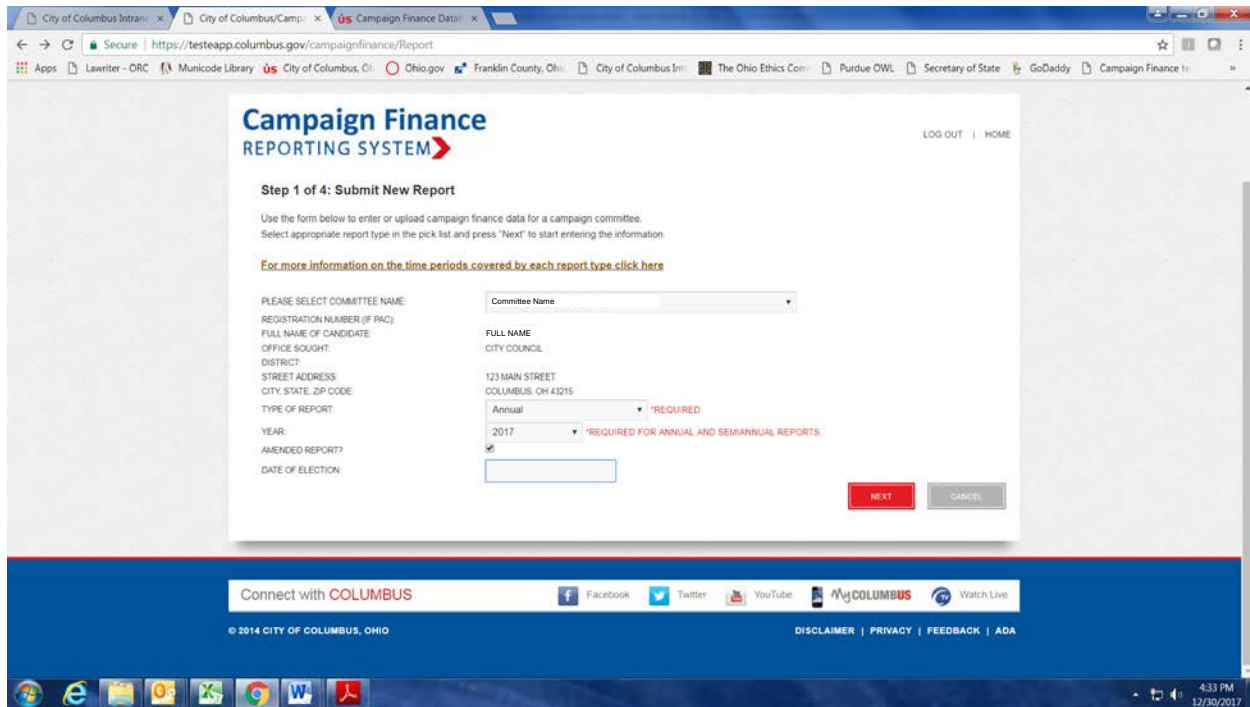
3. Specify the report type, this field is required. Ensure you select the correct report type. The report type cannot be changed by a user once the report has been submitted. However, we can change it if necessary with a written request from the Account Manager.

***For more information on campaign finance report types, see the document “Campaign Finance Filing Descriptions” on the City Council Campaign Finance website:**

<https://www.columbus.gov/council/How-Do-I/Campaign-Finance-Database/>

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?”, if it is selected a checkmark will appear in the box.

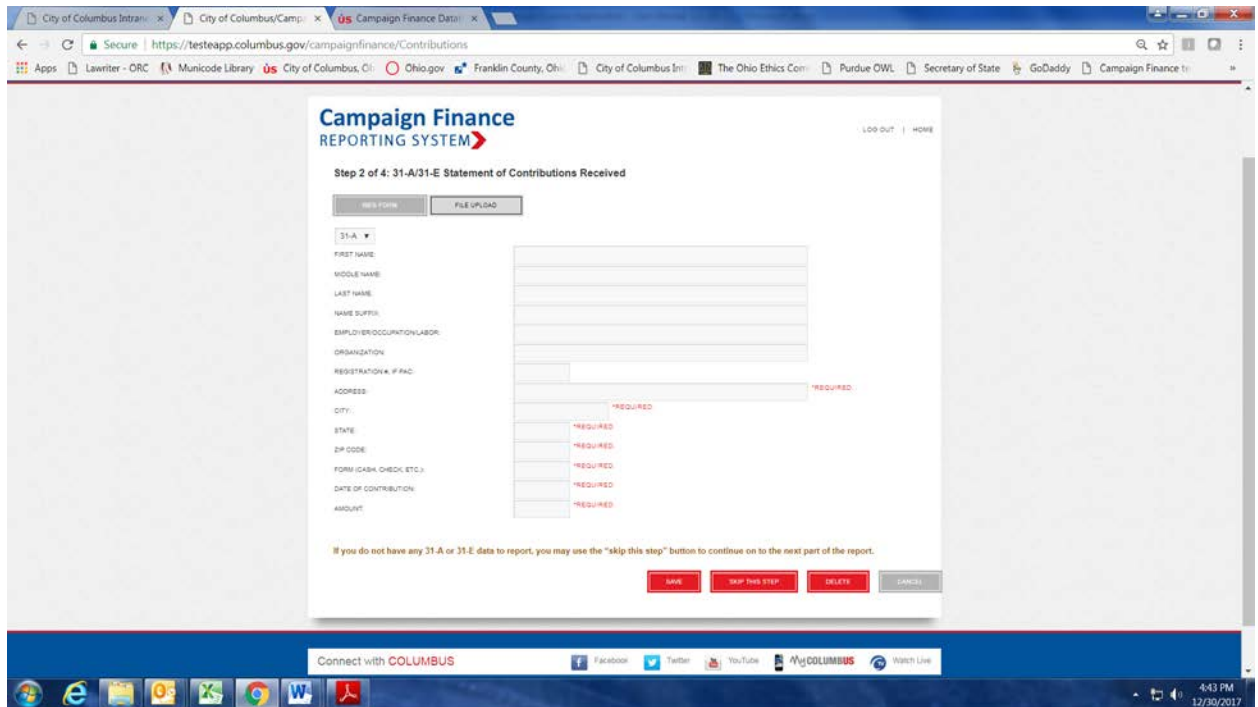


6. If this report is associated with an election, input the date of the election in the “Date of Election” field.
7. Select the “Next” button to continue to the next section.

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. **File Upload** – 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:** The City of Columbus Template Form 31A Contributions is available on the City Council Campaign Finance website:

<https://www.columbus.gov/council/How-Do-I/Campaign-Finance-Database/>

***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 Management" available on the City Council's Campaign Finance website:**

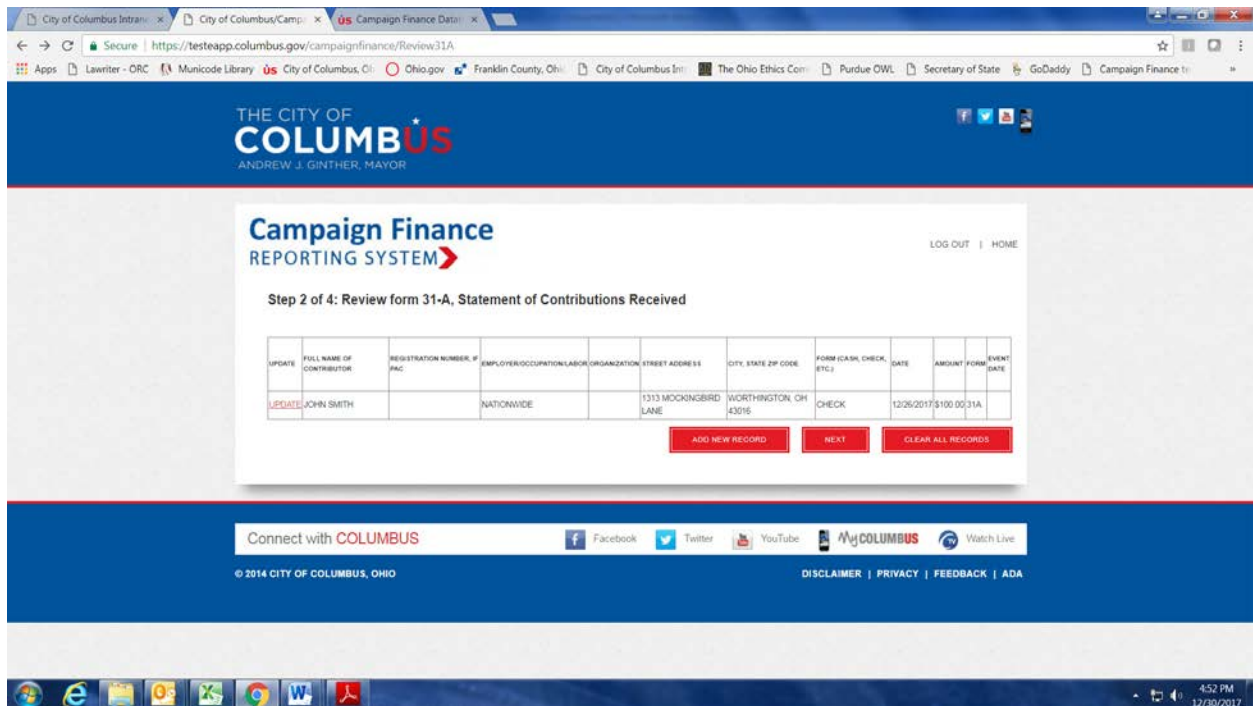
<https://www.columbus.gov/council/How-Do-I/Campaign-Finance-Database/>

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.

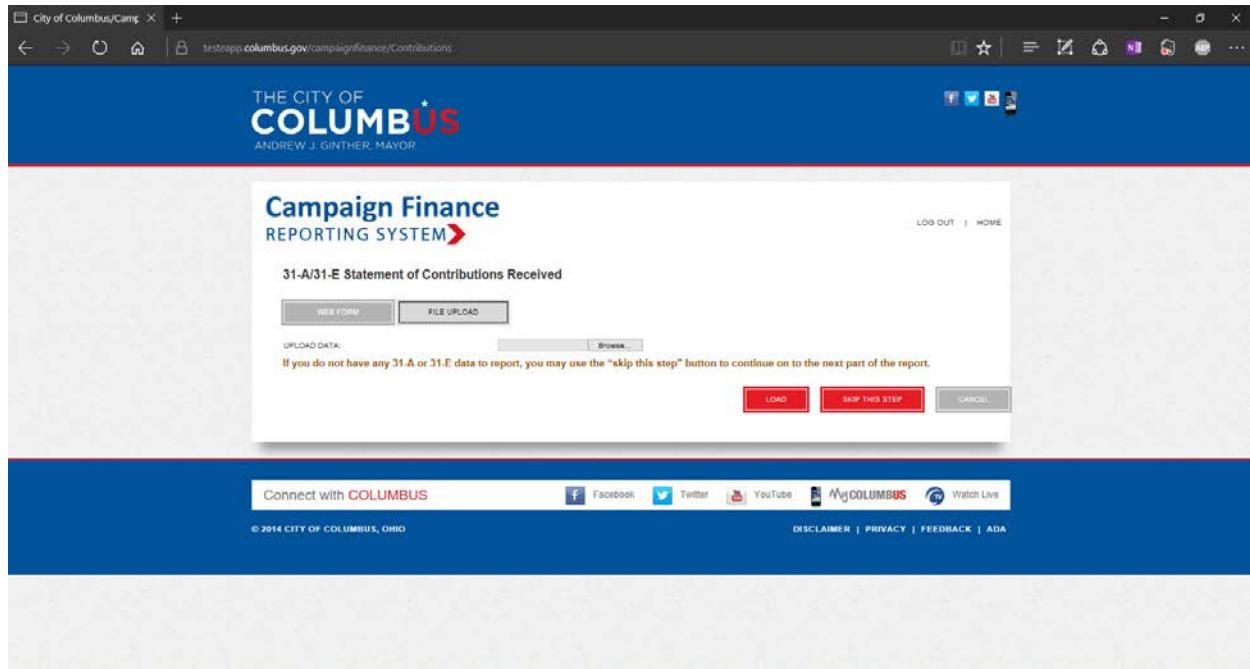
You may enter data for each contribution individually and select either 31-A if the contribution is a regular contribution or 31-E if it is associated with a fundraising event.

After you enter each contribution, you have the option of editing the information by clicking on "UPDATE," adding another contribution by clicking on "ADD NEW RECORD," or clicking on

“NEXT” to proceed with entering expenditures. You also may click on “CLEAR ALL RECORDS” if you desire 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.

Campaign Finance REPORTING SYSTEM

LOG OUT | HOME

Step 3 of 4: 31-B/31-F Statement of Expenditures

WEB FORM | FILE UPLOAD

31-B
FIRST NAME
MIDDLE NAME
LAST NAME
NAME SUFFIX
ORGANIZATION
DATE
AMOUNT
PURPOSE
ADDRESS
CITY
STATE
ZIP CODE
CHECK NUMBER

*REQUIRED
*REQUIRED
*REQUIRED
*REQUIRED
*REQUIRED
*REQUIRED

If you do not have any 31-B or 31-F data to report, you may use the "skip this step" button to continue on to the next part of the report.

SAVE DELETE SKIP THIS STEP CANCEL

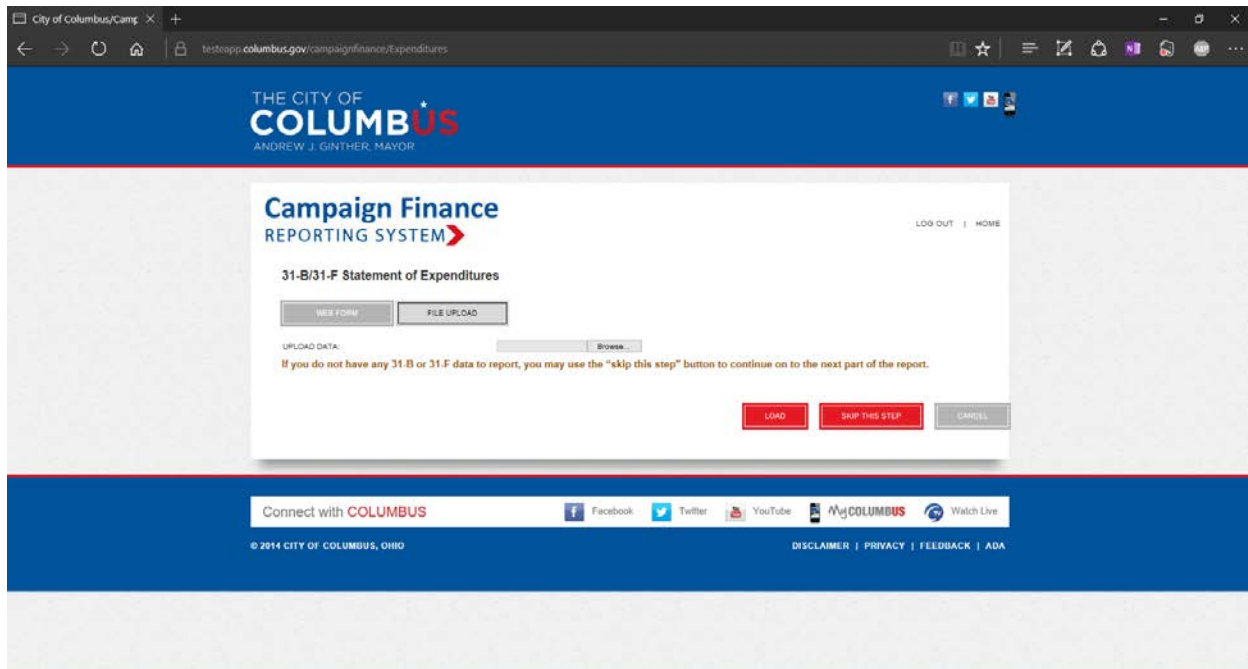
***Note:** The City of Columbus Template Form 31B Expenditures is available on the City Council Campaign Finance website:

<https://www.columbus.gov/council/How-Do-I/Campaign-Finance-Database/>

***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 Management" available on the City Council's Campaign Finance website:**

<https://www.columbus.gov/council/How-Do-I/Campaign-Finance-Database/>

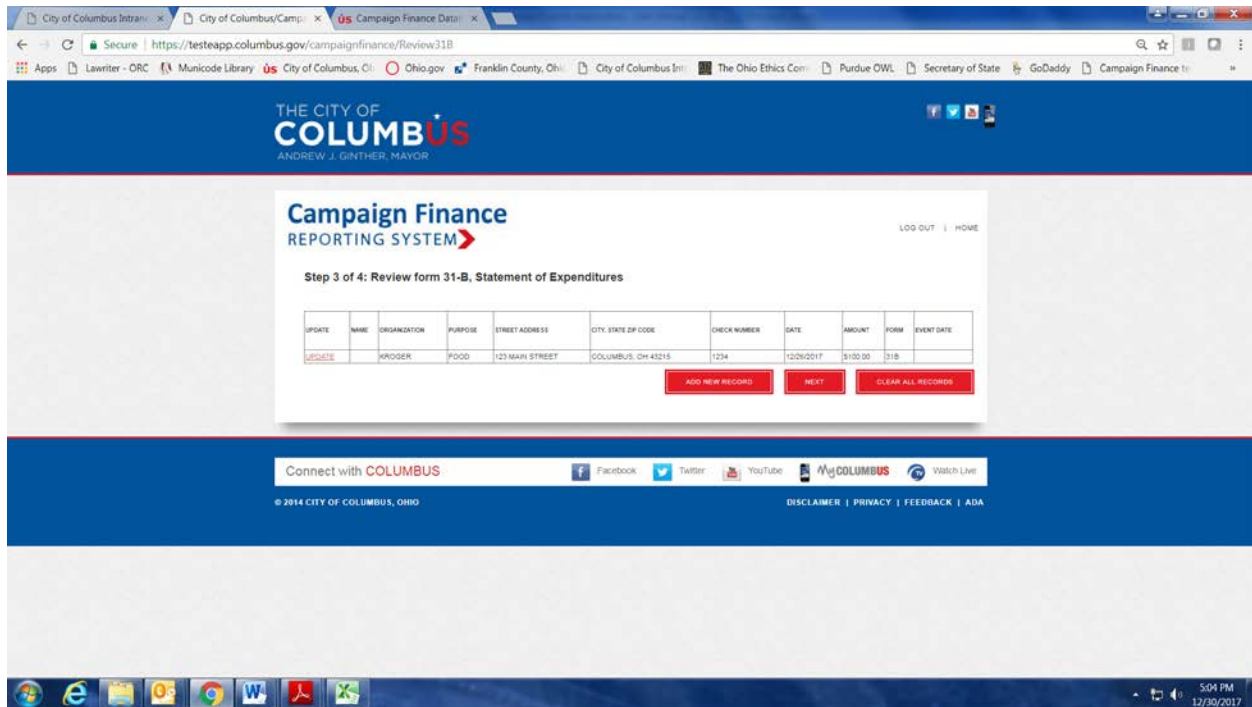
Click on the red "SAVE" button once all data has been entered or imported. If there is no data for this step it may be skipped with the red "SKIP THIS STEP" button.



2. User Input – 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.

You may enter data for each expenditure individually and select either 31-B if the expenditure is a regular expenditure or 31-F if it is associated with a fundraising event.

After you enter each expenditure, you have the option of editing the information by clicking on “UPDATE,” adding another expenditure by clicking on “ADD NEW RECORD,” or clicking on “NEXT” to proceed. You also may click on “CLEAR ALL RECORDS” if you desire to delete all expenditure information and start over.



Template Import Method

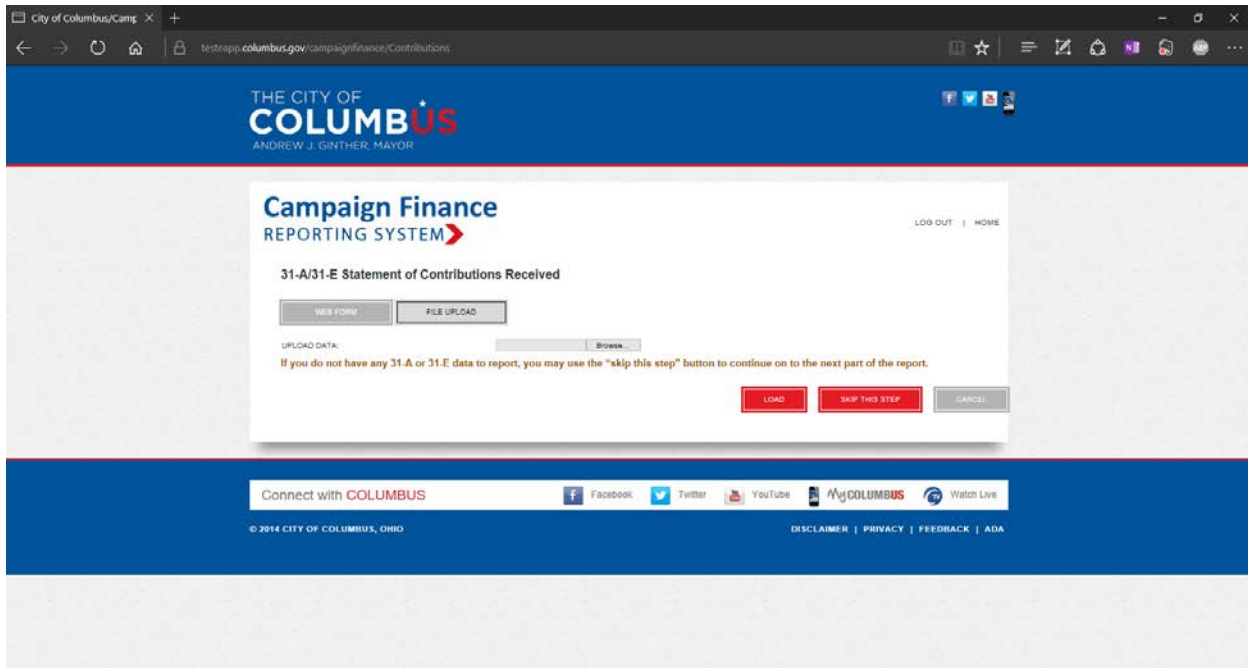
Using a standardized template provided by the City of Columbus, campaign finance data can be easily imported into the Campaign Finance application rather than manually entering each transaction. The spreadsheet and user guide for it can be found on the “Campaign Committee Information” page at the bottom.

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 where you have the spreadsheet stored on your 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.
 - 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 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 you have entered for the reporting period.

***Note -** Please ensure the numbers you enter match the Form 30-A that you file with the Franklin County Board of Elections.

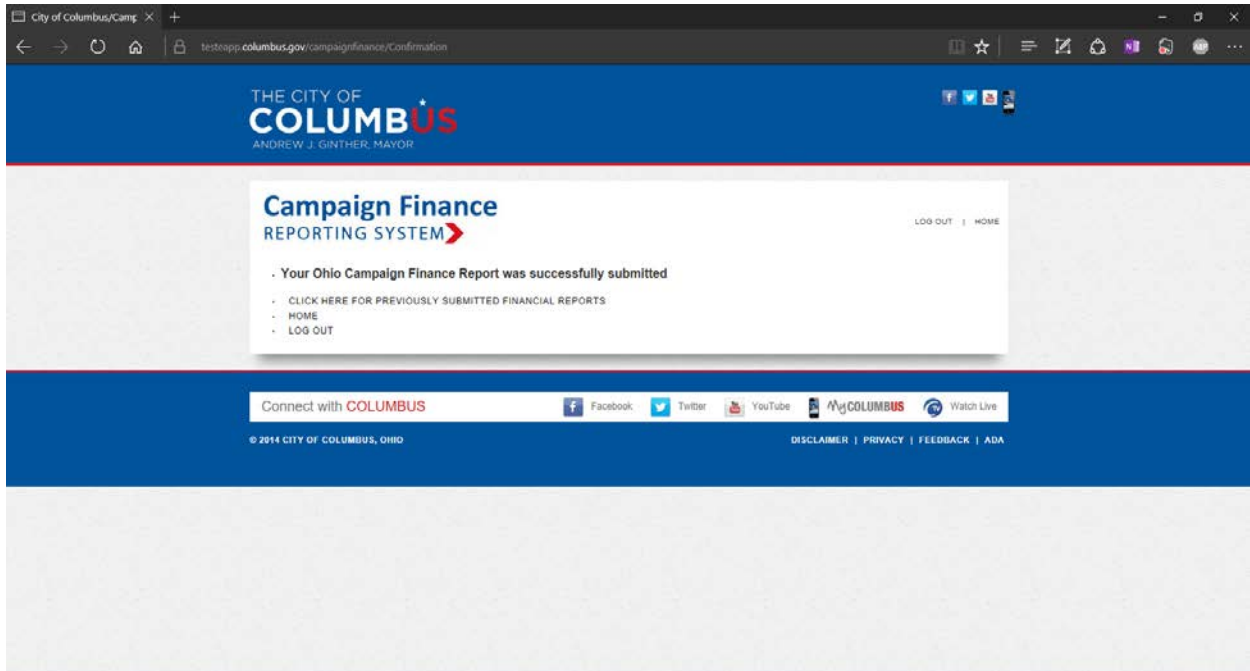
PDF files of other Ohio Secretary of State prescribed forms (such as Form 31-C Outstanding Loans or 31-J-1 for In-Kind Contributions Received) may also be uploaded into the application. For any forms uploaded, manually enter the amount on the corresponding line on the Cover Page 30-A web page.

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 your campaign finance report.

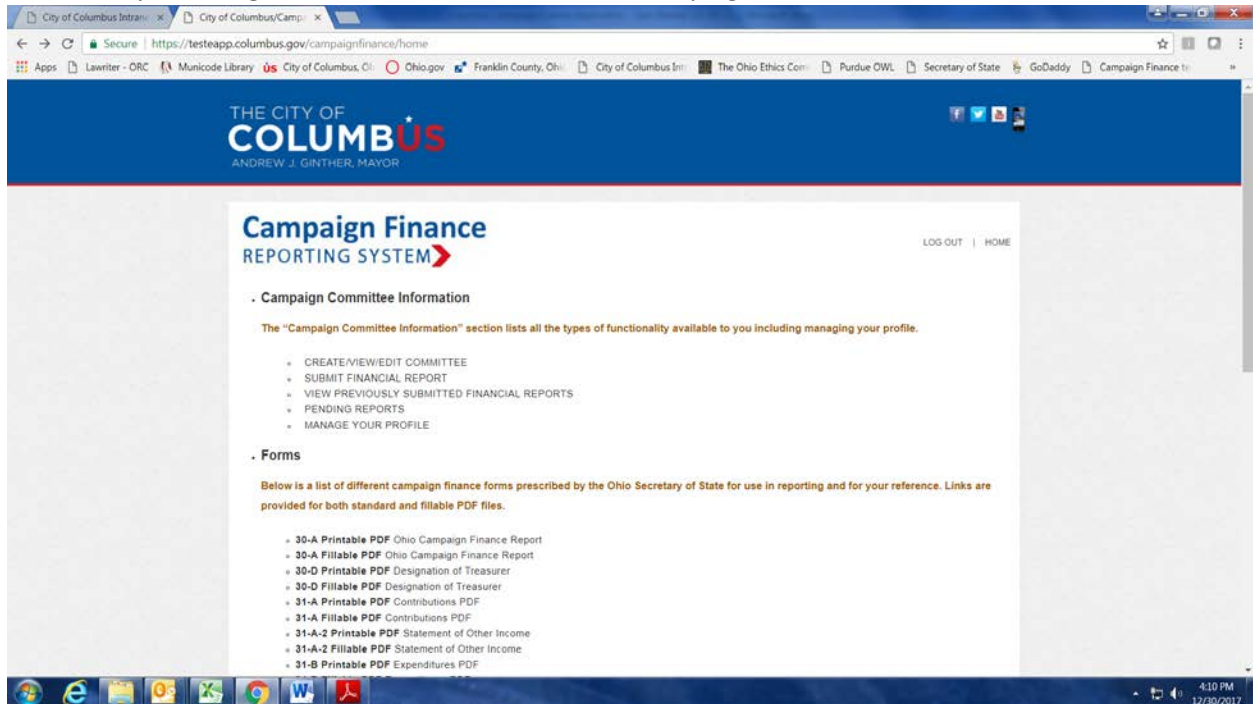
Successful Submission (Step 5)

If your campaign finance report was submitted successfully, you will receive notice that it was submitted.



Pending Reports

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

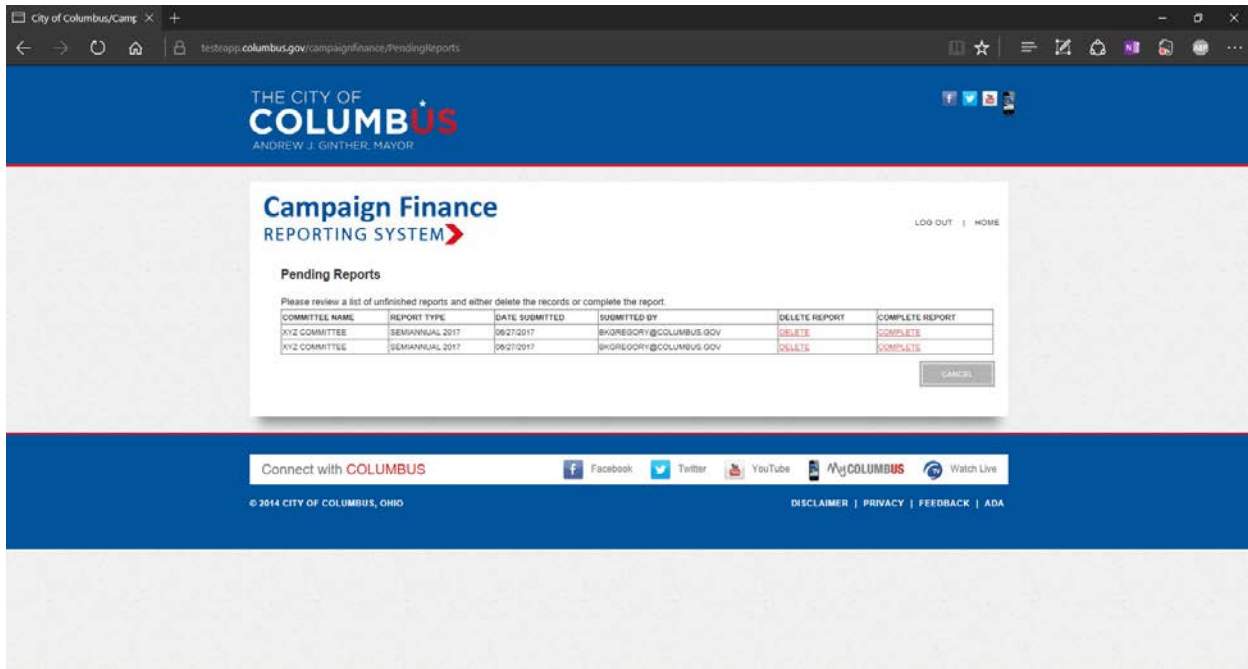


You may click on “COMPLETE” to continue entering contribution and expenditure data for the report and to submit it once you are finished.

Follow the steps for Submitting a Report starting on Page 22 to complete entering data.

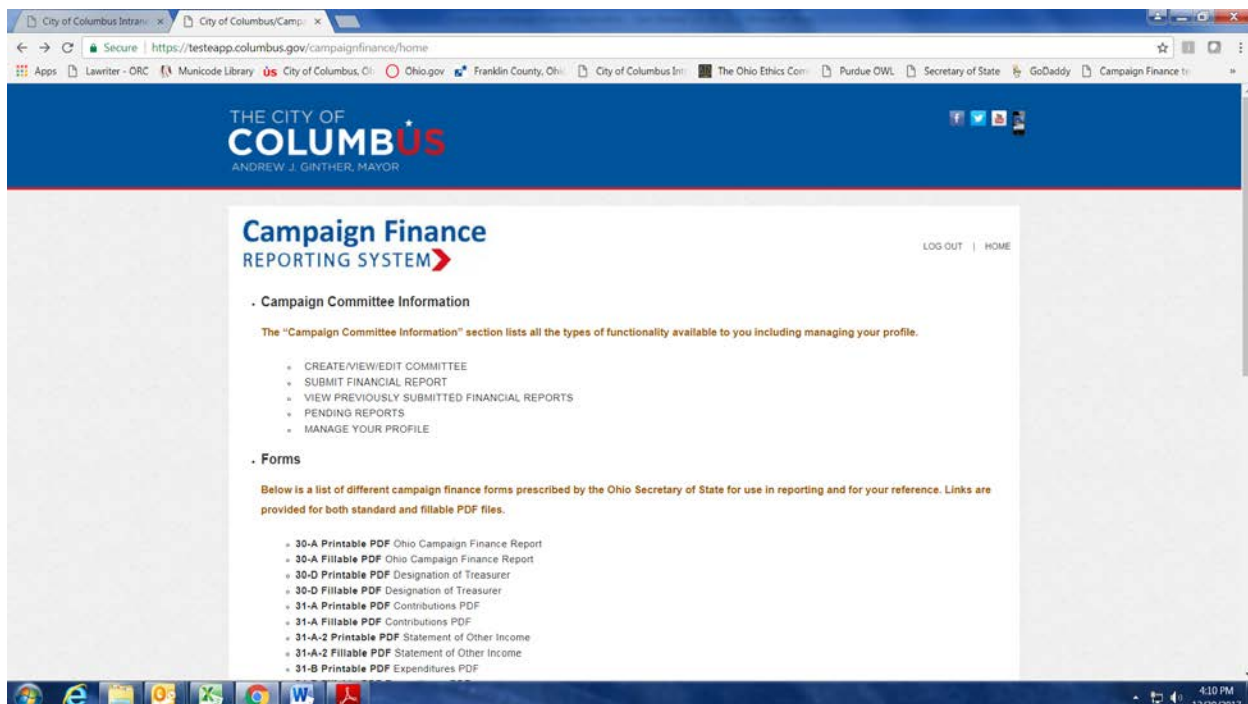
You may click on “DELETE” to delete the report that you have started but not yet submitted for the reporting period. Once you delete a pending report, the data cannot be recovered.

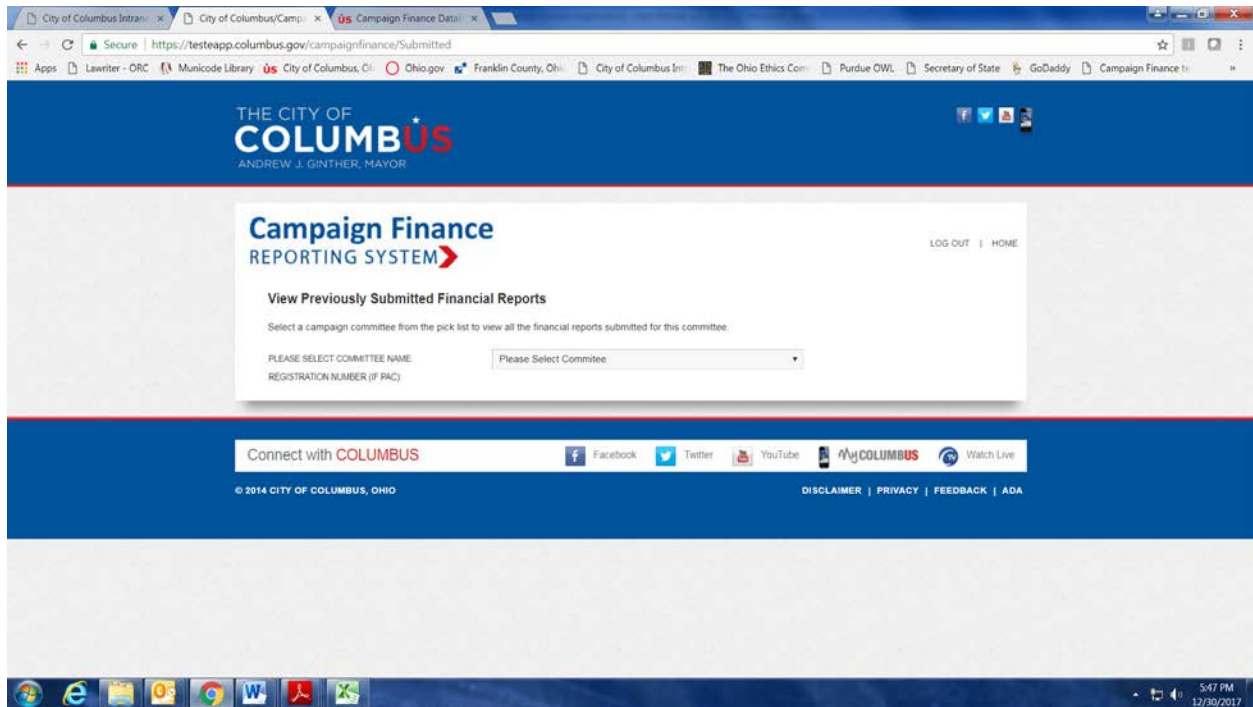
A campaign finance report that has already been submitted cannot be deleted later.



Viewing Historical Data

You 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.





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

Getting Support

You may contact Andrea Blevins at 614-645-7431 or anblevins@columbus.gov with questions about the Columbus Campaign Finance Application. If you are having problems uploading your data using a spreadsheet or template, you may be referred to the Columbus Department of Technology for additional assistance.

Appendix A – Campaign Finance Report Types

EXPLANATION OF CAMPAIGN FINANCE REPORT TYPES (12/27/17)

All campaign finance reports for the campaign committees of municipal candidates and municipal ballot issues as well as those of political action committees, political contributing entities, and political parties that make a contribution to or an expenditure in support of or in opposition to a municipal candidate or municipal ballot issue are required to file campaign finance reports with both the Franklin County Board of Elections and the Columbus City Clerk. Campaign finance reports filed with the Franklin County Board of Elections are paper only, while the campaign finance reports filed with the Columbus City Clerk are electronic only. However, the Columbus Campaign Finance Reporting System was designed to convert electronic reports filed with the City Clerk to pdf files that may be printed, signed, and filed with the Franklin County Board of Elections.

Campaign finance report filing deadlines are based upon when the candidate or ballot issue appears on the ballot. For write-in candidates, the reports are based upon the election when the office for which the write-in candidate was certified to receive votes is on the ballot.

Columbus municipal officers (Mayor, Council Member, City Auditor, and City Attorney) are only elected in odd-numbered years (2017, 2019, 2021, etc.). A municipal ballot issue could appear on the ballot in any year.

Under the Columbus City Charter, a primary election is not held when only two candidates are certified by the Franklin County Board of Elections to the ballot for the office to be elected that year at the general election. For city council members, no primary election is held when the number of candidates that are certified to the ballot is no more than two times the number of city council members to be elected that year. For example, in a year when three city council members are to be elected, no primary election would be held if only six or less candidates are certified to the ballot. However, a primary election would have to be held if seven or more candidates are certified to run in a year when three city council members are to be elected at the general election. Amendments to the campaign finance ordinance in 2017 clarified that campaign finance reports related to the date of the primary election are **still required to be filed** by the candidates for office even if there is no primary election held for that office that year.

State law required campaign finance reports

1. Annual Report – must be filed no later than 4 pm on the last business day of January to reflect contributions received and expenditures made between the time period covered in the most-recent previously filed campaign finance report and December 31 of the prior year. However, the Annual Report is not required if a campaign committee filed a Post-General Election Report. An Annual Report is required to be filed even if the campaign committee had no contributions or expenditures for the reporting period.
2. Semiannual Report – must be filed no later than 4 pm of the last business day of July to reflect all contributions received and expenditures made between the time period covered in the most-recent previously filed campaign finance report and June 30. A Semiannual Report is not

required if a campaign committee was required to file a Post-Primary Election Report. The campaign committees of municipal candidates are not required to file a Semiannual Report unless the campaign committee received contributions exceeding \$10,000 for the reporting period.

3. Pre-Primary, Pre-General, and Pre-Special Election Reports – must be filed no later than 4 pm of the twelfth day before the election to reflect contributions received and expenditures made between the time period covered in the most-recent previously filed campaign finance report and the 20th day before the election. However, the Pre-Primary, Pre-General, and Pre-Special Election Reports are only required if the candidate or municipal ballot issue is on the ballot at that election and if the campaign committee received or spent \$1,000 or more for the reporting period. The \$1,000 threshold includes monetary and in-kind contributions as well as the value of any new loans received during the reporting period.
4. Post-Primary, Post-General, and Post-Special Election Reports – must be filed no later than 4 pm of the 38th day after the election when the candidate or ballot issue appeared on the ballot to reflect any contributions and expenditures not previously reported through the 31st day after the election.
5. Designation of Treasurer – this form is considered a “registration” form for the campaign committee of a municipal candidate or municipal ballot issue and includes basic information such as the candidate’s name and address, the campaign committee’s name, the office sought and the name of the treasurer and any deputy treasurers. The candidate must either designate herself/himself or another person as the campaign committee treasurer. The candidate must, and the treasurer should, sign the Designation of Treasurer Form. Candidates are responsible to update/amend this information as necessary by filing an updated Designation of Treasurer form with the Board of Elections and the Columbus City Clerk. There is no specific deadline for filing a Designation of Treasurer or to file an updated version, but one must be filed before the campaign committee receives any contributions or makes any expenditures.
6. Termination - A campaign committee for a candidate or municipal ballot issue may terminate by filing a final campaign finance report with the Board of Elections and Columbus City Clerk. The campaign committee must have a zero balance, no outstanding debts, and no outstanding loans before it can terminate. When these criteria have been met, the campaign committee must file a final report. This report should list all activity, if any, that has occurred since the most recent, previously-filed report. The termination box on the appropriate SOS Form must also be marked when the committee wants to terminate. There is no separate form for terminating.

Columbus City Code Required Campaign Finance Reports

Columbus City Codes section 2321.53(D) requires different campaign finance reports depending upon whether the candidate or the municipal ballot issue are on the ballot that year or not. The Columbus campaign finance reports are **in addition to** the state-law required campaign finance reports:

1. Mid-Cycle/60 Day Report – must be filed no later than 4 pm of the 60th day before the primary and/or the general election when the candidate or municipal ballot issue appears on the ballot (or when a certified write-in candidate is eligible to receive write-in votes) to reflect contributions made or received and expenditures made from the close of business on the last day reflected in the most-recent previously filed campaign finance report (if any) through the close of business on the sixty-eighth day before the election. However, the campaign committee of a municipal candidate is not required to file the Mid-Cycle/60 Day Report unless the committee had total contributions or total expenditures for the reporting period equal to or exceeding \$10,000.00. Note that a Mid-Cycle/60 Day Report is not required before a Special Election.
2. 5 Day Report – must be filed no later than 4 pm of the 5th day before the primary, general, or special election when the candidate or municipal ballot issue appears on the ballot (or when a certified write-in candidate is eligible to receive write-in votes) to reflect contributions made or received and expenditures made from the close of business on the nineteenth day before the election through the close of business on the sixth day before the election. However, the campaign committee of a municipal candidate is not required to file the 5 Day Report unless the committee had total contributions or total expenditures for the reporting period equal to or exceeding \$10,000.00.
3. April Quarterly Report – must be filed no later than 4 pm on the last business day of April every year, except those years when the candidate or municipal ballot issue appears on the ballot, to reflect contributions made or received and expenditures made from the close of business on the last day reflected in the most-recent previously filed campaign finance report (if any) through the close of business on the last day of March of that year. However, the campaign committee of a municipal candidate is not required to file the April Quarterly Report unless the committee had total contributions or total expenditures for the reporting period equal to or exceeding \$10,000.00.
4. October Quarterly Report – must be filed no later than 4 pm on the last business day of October every year, except those years when the candidate or municipal ballot issue appears on the ballot, to reflect contributions made or received and expenditures made from the close of business on the last day reflected in the most-recent previously filed campaign finance report (if any) through the close of business on the last day of September of that year. However, the campaign committee of a municipal candidate is not required to file the October Quarterly Report unless the committee had total contributions or total expenditures for the reporting period equal to or exceeding \$10,000.00.

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>.

