INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

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For assistance, call:
Commission on Governmental Ethics and Election Practices
207-287-4179

Notes:

INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

All Candidates: Logging into the E-Filing System. See page 18 for changing your password.

1. Go to the Commission's website:

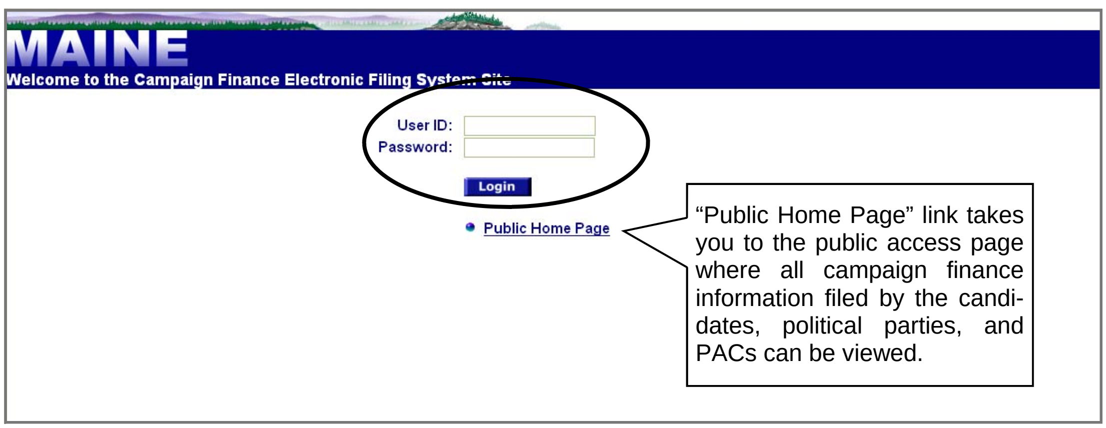
www.maine.gov/ethics

2. To get to the Commission's electronic filing system, click:

Filer Login →

3. Enter your user ID and password. These fields are not case sensitive.

4. Click: **Login**



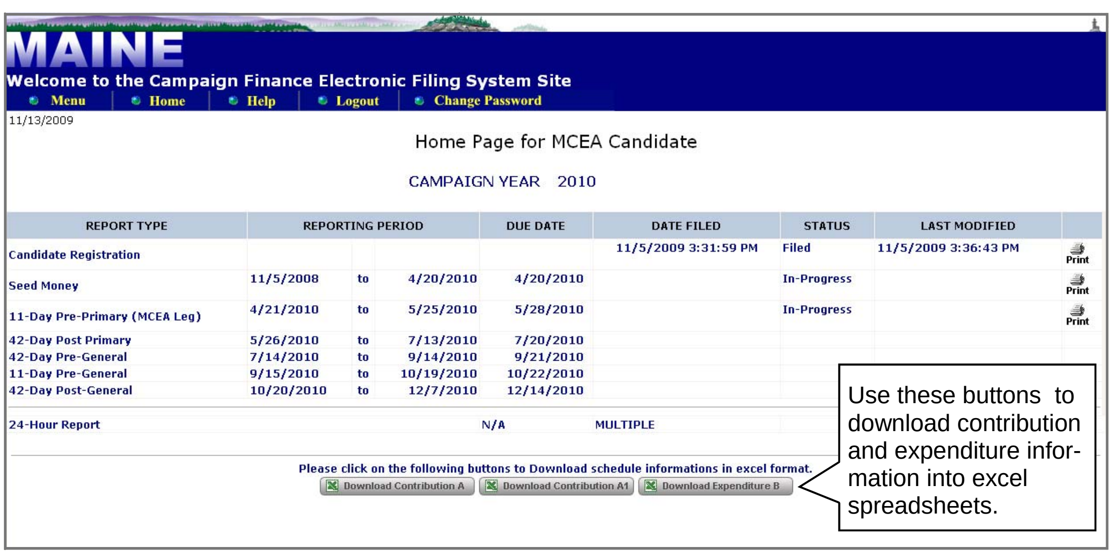
"Public Home Page" link takes you to the public access page where all campaign finance information filed by the candidates, political parties, and PACs can be viewed.

This is your home page for accessing and filing your campaign finance reports.

MCEA home page at left.

Traditionally financed home page, see next page.

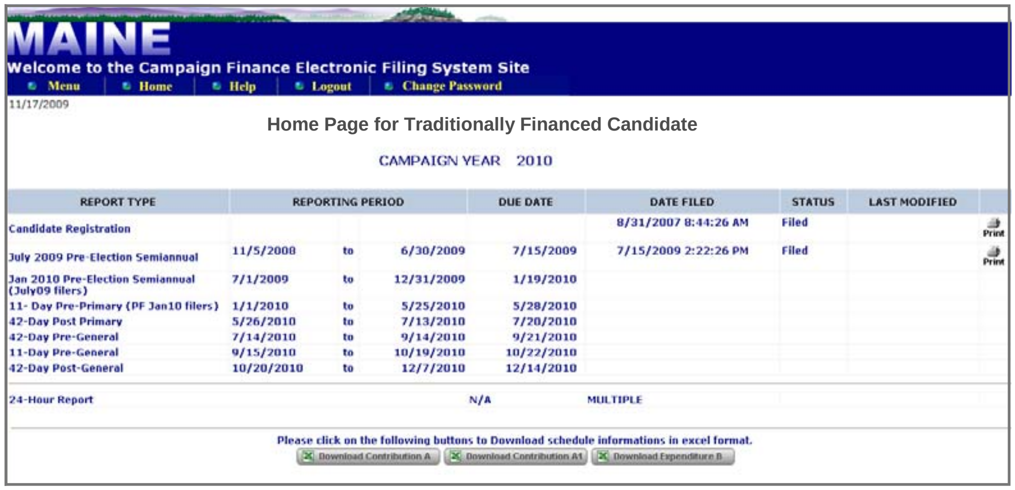
To change your password, see page 18.

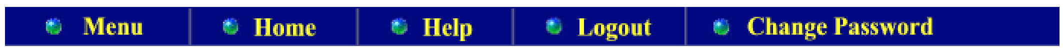


Use these buttons to download contribution and expenditure information into excel spreadsheets.

INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

Home page for traditionally financed candidate.





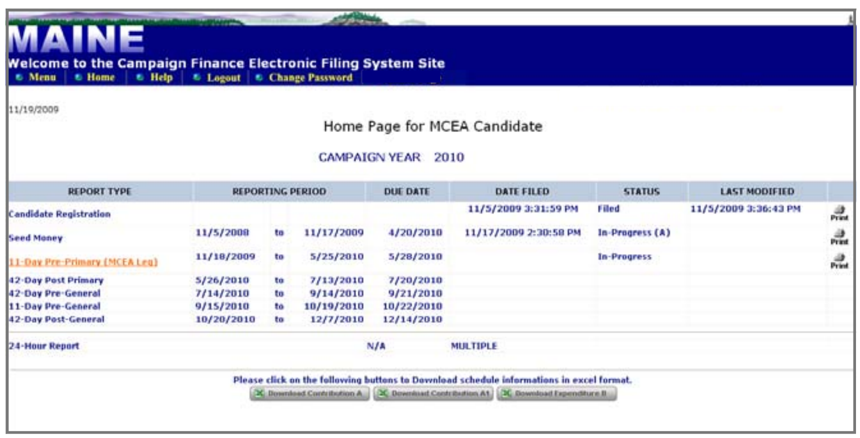
Use the buttons on the top menu bar to navigate around the e-filing system.

- When you're in a report, use this button to navigate within the report.
- Click to get back to your home page.
- Will be updated.
- Click to log out.
- Click to change your password. We recommend that you do.

All Candidates: Entering Information into a Report

Click the report name that you are entering information into.

Notice that the reporting period for each report is listed.



Entering contributions:

Check the box for "Schedule A."

Click:

"Add New Transactions."

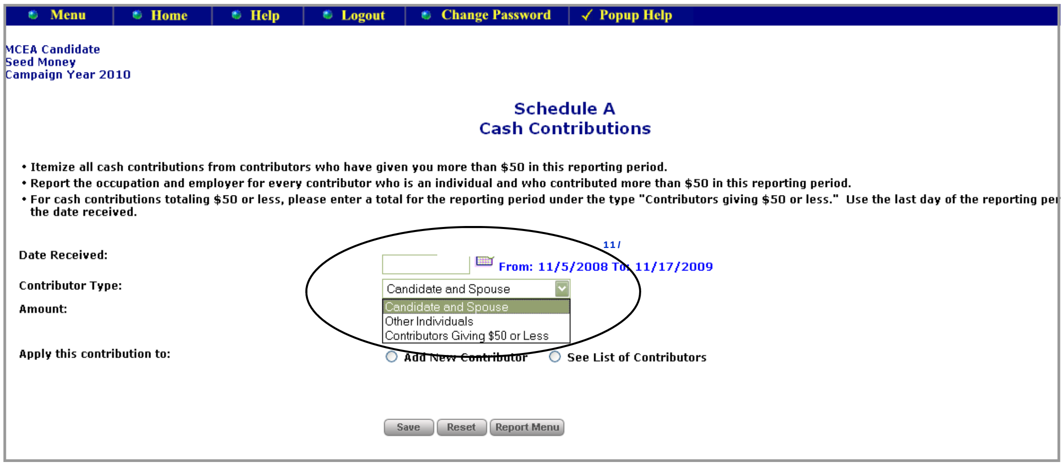
Another way to get to "Add New Transaction" screen": put cursor over "Menu", select from dropdown box.

MCEA Candidates: Entering Seed Money Contributions

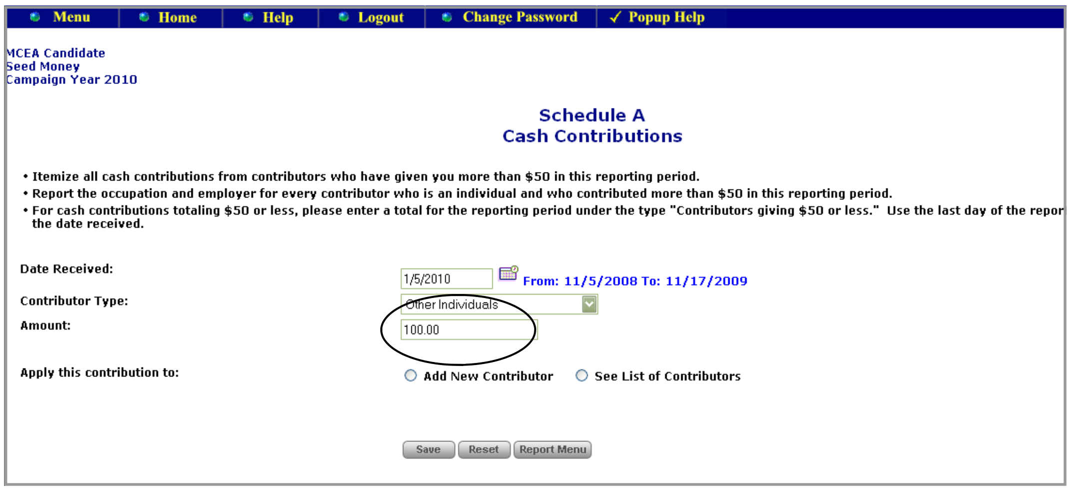
Note: Entering in-kind contributions on Schedule A-1 is similar to entering cash contributions

Enter the date of the contribution.

Select "Contributor Type" from list.



Enter amount.



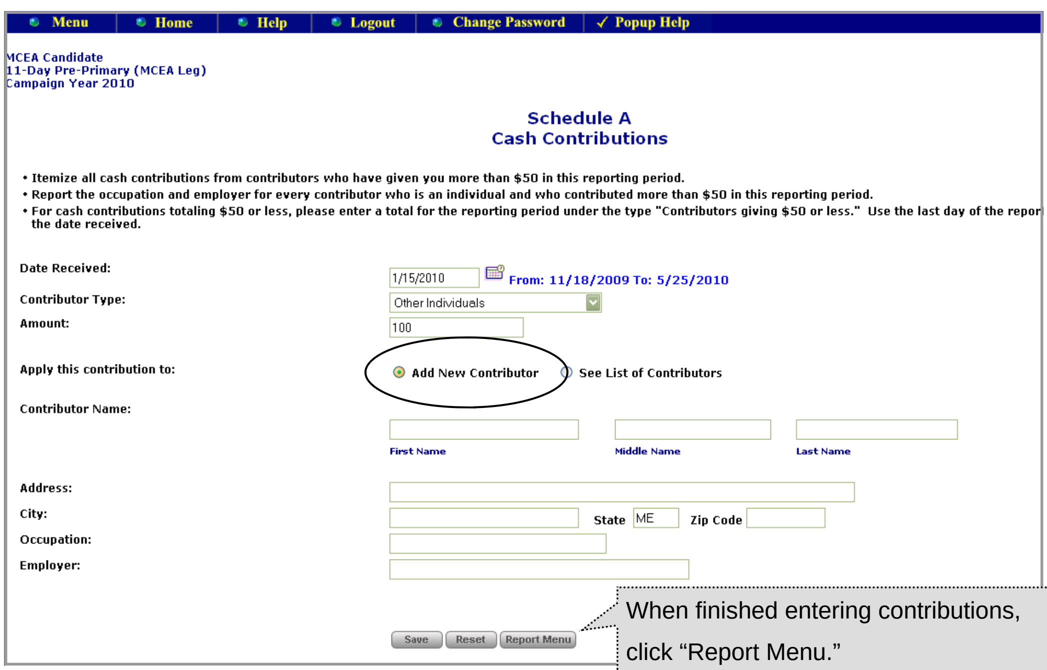
For NEW contributors:

1. Select "Add New Contributor."
2. Enter the information.

Click : Save

A new blank screen will appear.

Continue entering contributions.



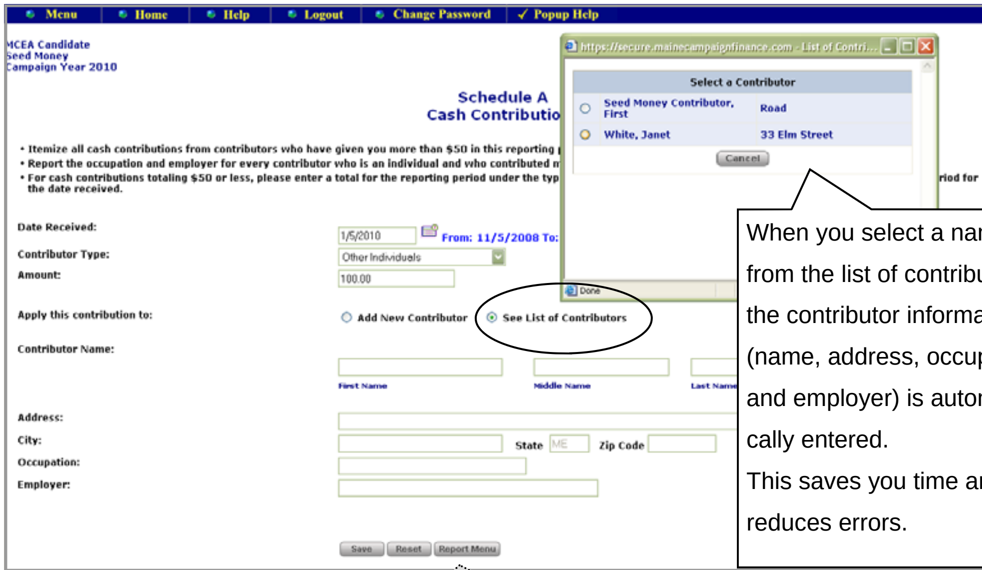
When finished entering contributions, click "Report Menu."

INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

For contributors you have already entered into the system:

1. Select "See List of Contributors."
2. A list box (at right) will display.
3. Select name from list.

Click: Save



When you select a name from the list of contributors, the contributor information (name, address, occupation and employer) is automatically entered.

This saves you time and reduces errors.

When finished entering contributions, click "Report Menu."

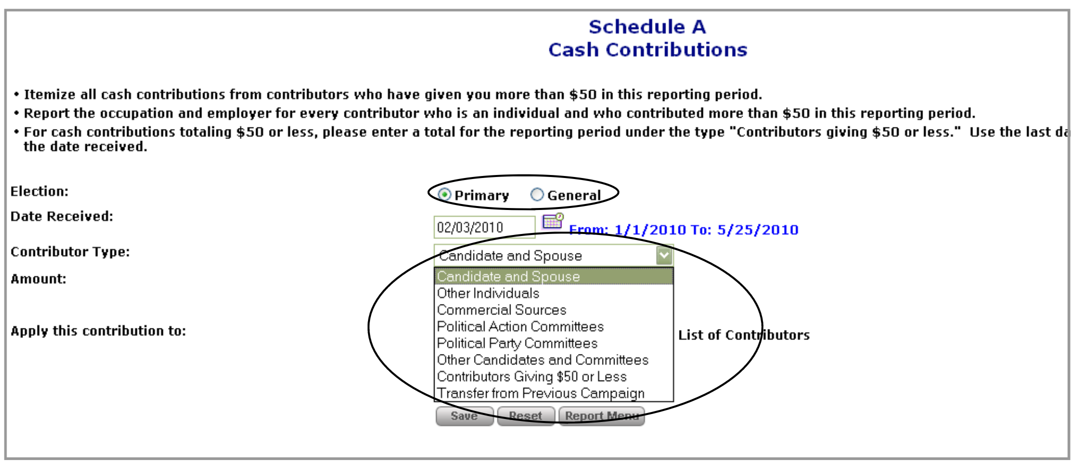
Traditionally Financed Candidates: Entering Contributions

Note: Entering in-kind contributions on Schedule A-1 is similar to entering cash contributions

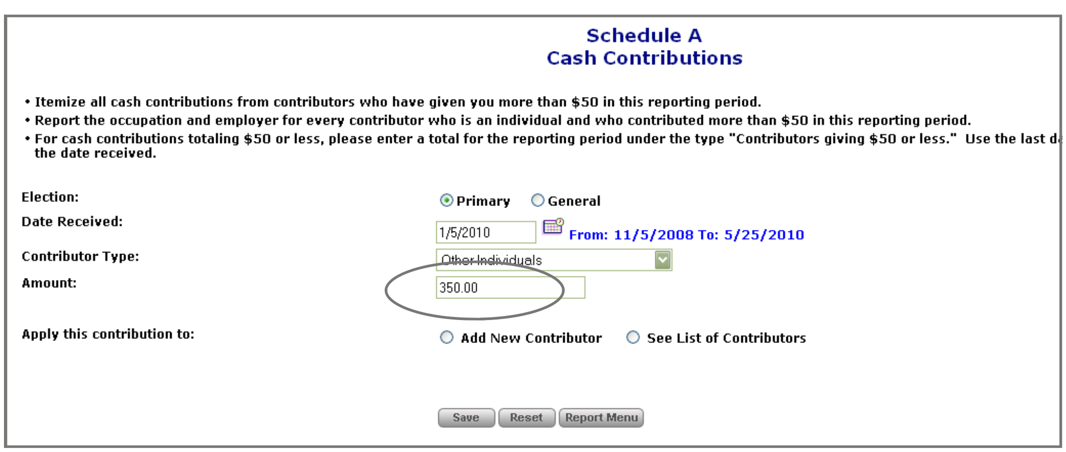
Select "Primary" or "General."

Enter the date of the contribution.

Select "Contributor Type" from the list.



Enter amount.



Instructions for the Campaign Finance E-Filing System

Traditionally Financed Candidate: Entering Contributions (continued)

Note: Entering in-kind contributions on Schedule A-1 is similar to entering cash contributions

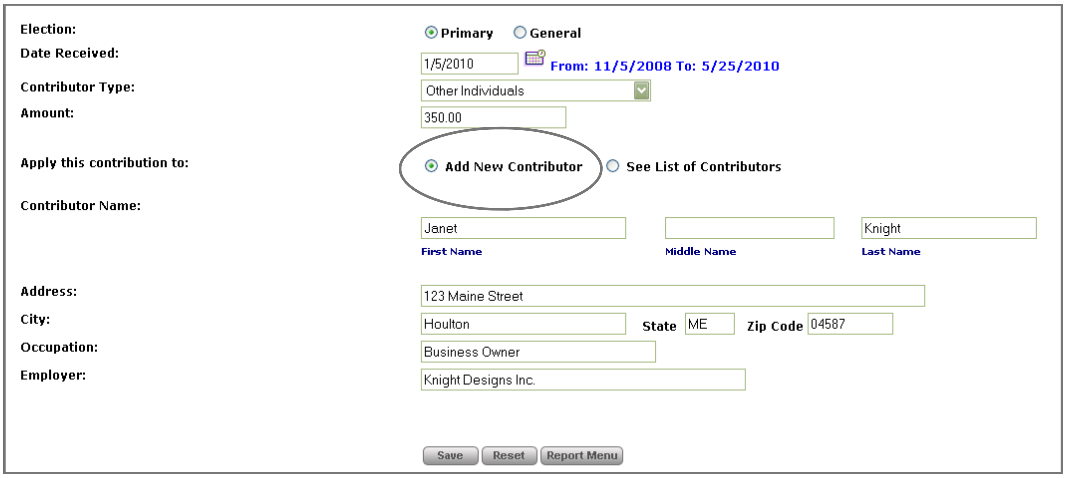
For NEW contributors:

1. Select "Add New Contributor."
2. Enter the information.

Click: Save

A new blank screen will appear.

Continue entering contributions.

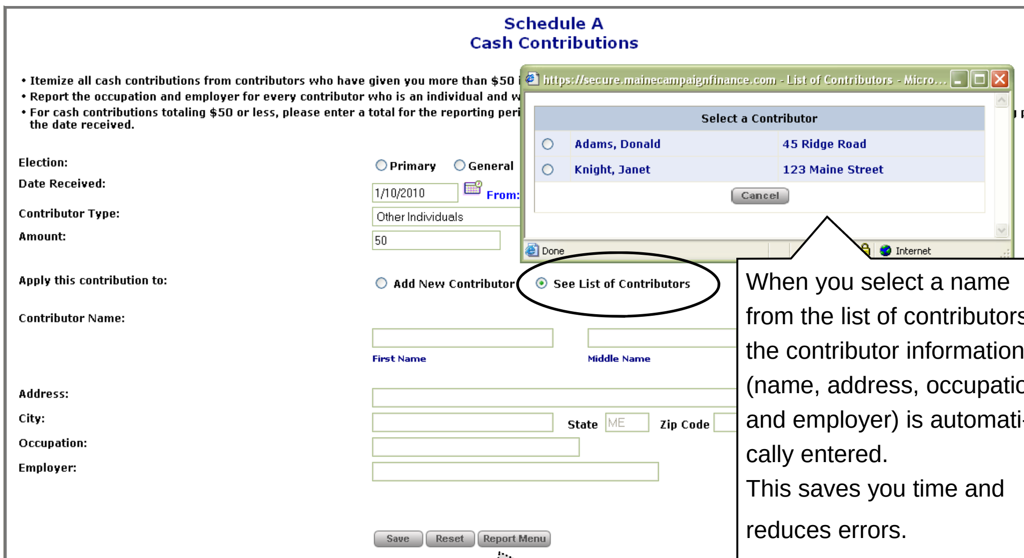


For contributors you have already entered into the system:

1. Select "See List of Contributors."
2. A list box (at right) will display.
3. Select name from list.

Click: Save

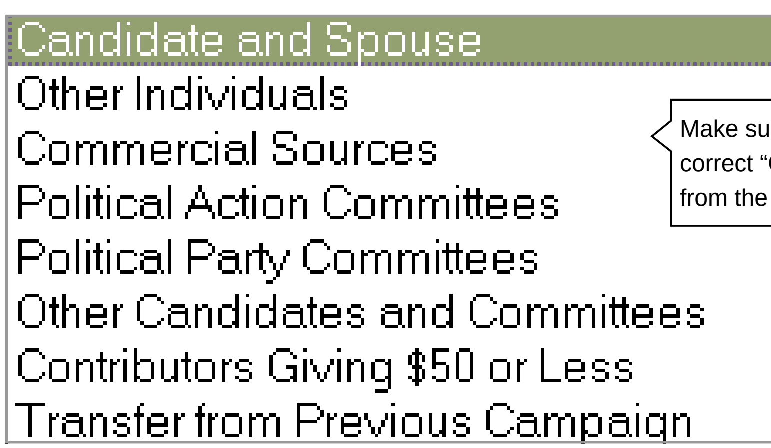
If name is not on list, click "Cancel" and follow instructions (above) for new contributor.



When you select a name from the list of contributors, the contributor information (name, address, occupation and employer) is automatically entered.
This saves you time and reduces errors.

When finished entering contributions, click "Report Menu."

Each contributor type (shown in dropdown box at right) has its own list of previously enter names. If you select "See List of Contributors" and the name you're looking for does not show on the list, make sure the correct contributor type was selected.



Make sure you select the correct "Contributor Type" from the dropdown box.

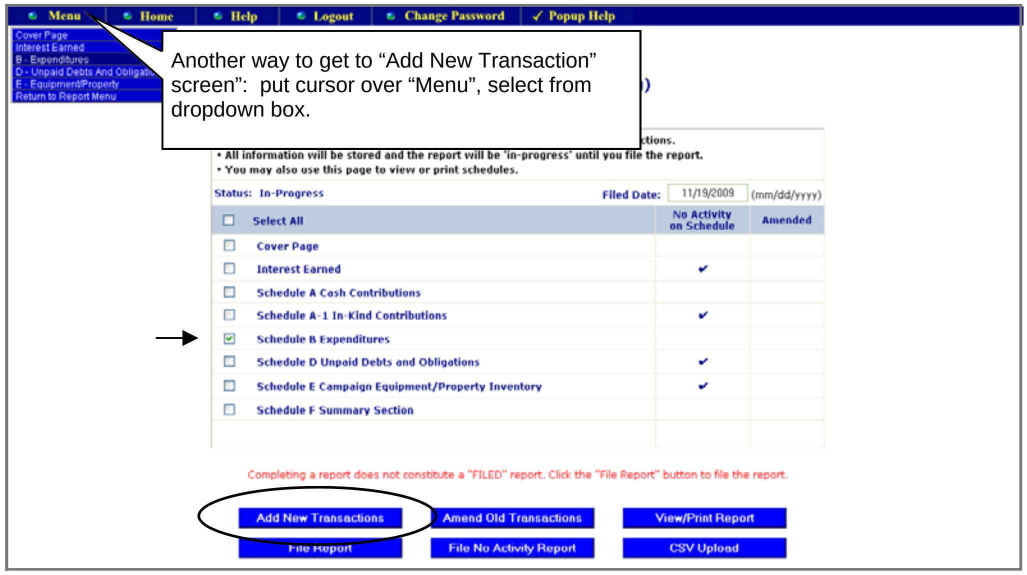
INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

All Candidates: Entering Expenditures

Check the box for "Schedule B Expenditures."

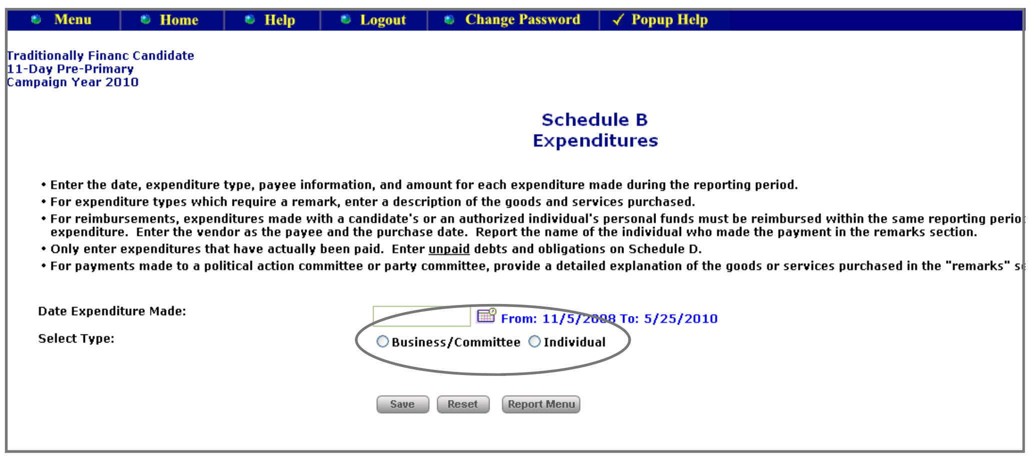
Click:

"Add New Transactions."



Enter the date of the expenditure.

Select "Type" of payee.

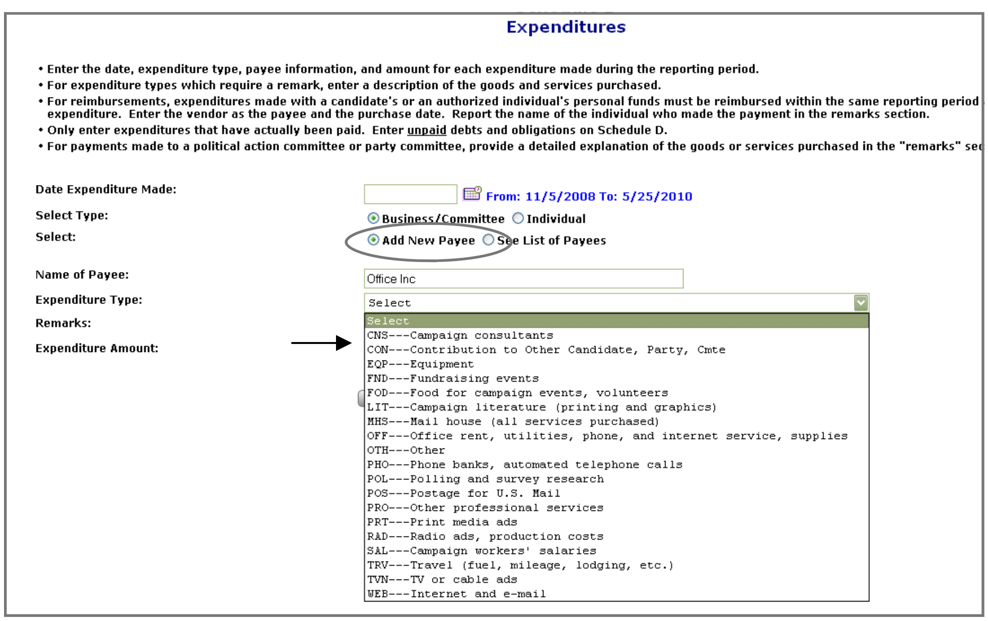


For NEW payee:

1. Select "Add New Payee."

2. Enter the payee name.

Select "Expenditure Type" from list.



All Candidates: Entering Expenditures (continued)

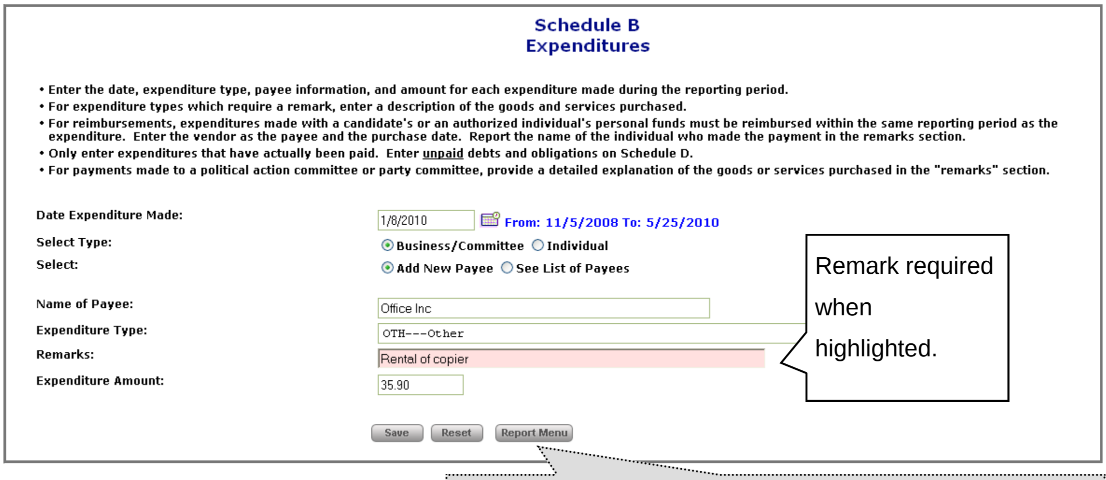
Enter remark if required. Remark field will be pink if remark required.

Enter amount.

Click: Save

A new blank screen will appear.

Continue entering expenditures.



When finished entering expenditures, click "Report Menu."

For payees you have already entered into the system:

Select "**See List of Payees.**"

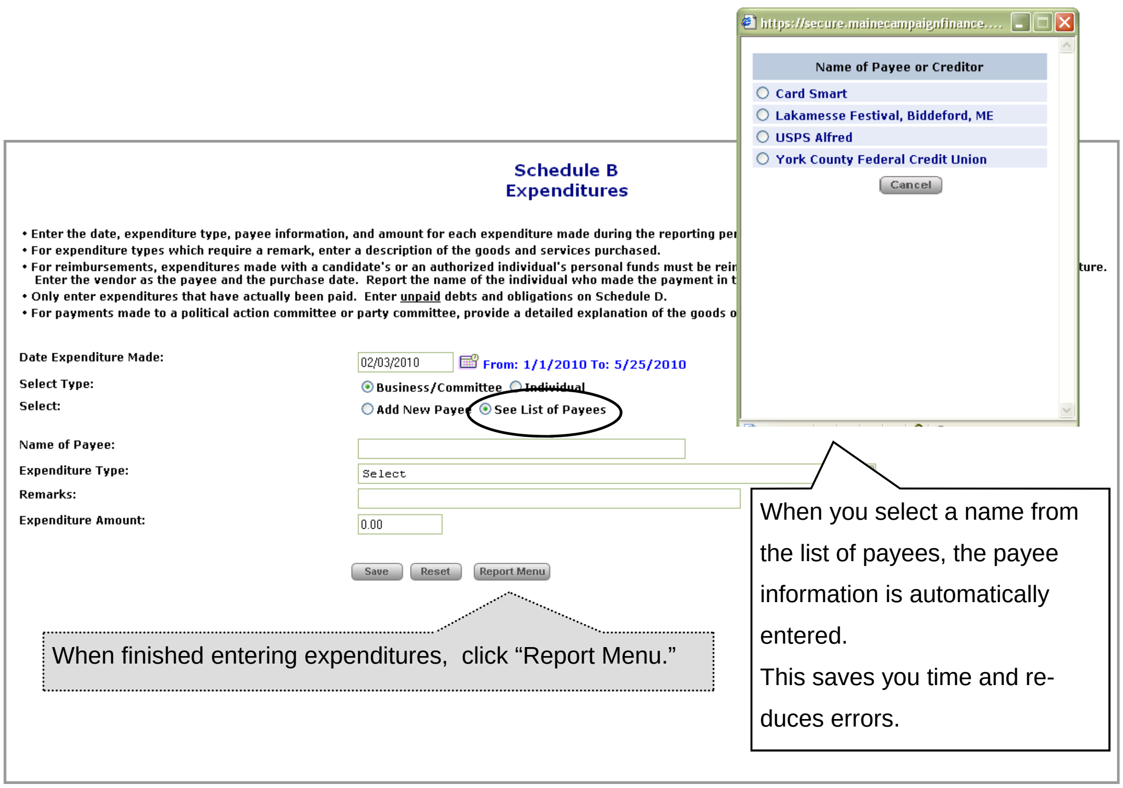
1. A list box (at right) will display.
2. Select name from list.

Select "Expenditure Type" from dropdown box.

Enter remark if required.

Enter amount.

Click: Save



When you select a name from the list of payees, the payee information is automatically entered.

This saves you time and reduces errors.

When finished entering expenditures, click "Report Menu."

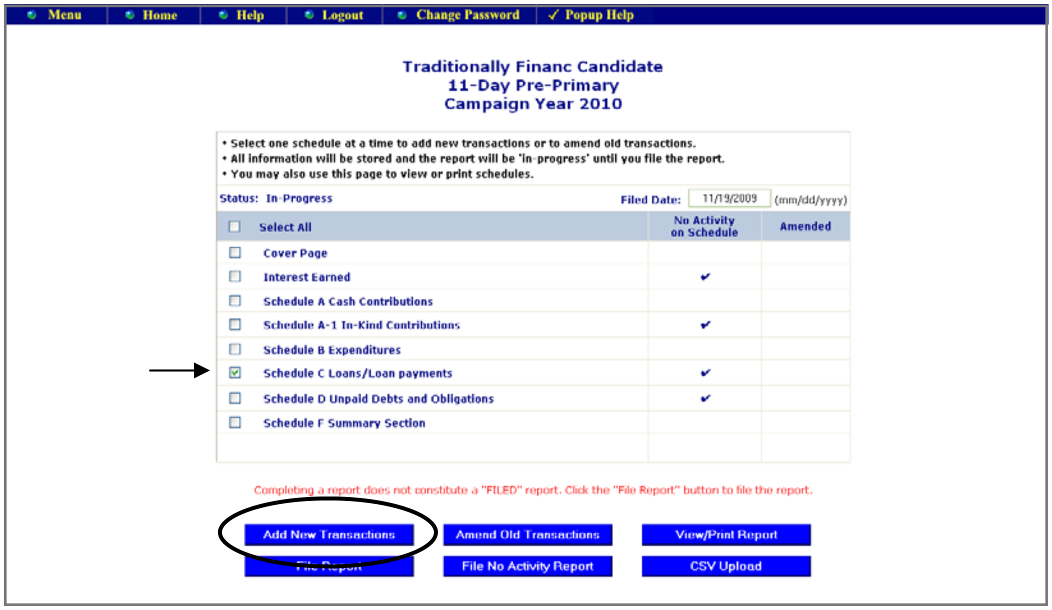
INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

Traditionally Financed Candidates: Entering Loans, Loan Payments and Forgiving Loans on Schedule C

Read First

To enter a **loan**:

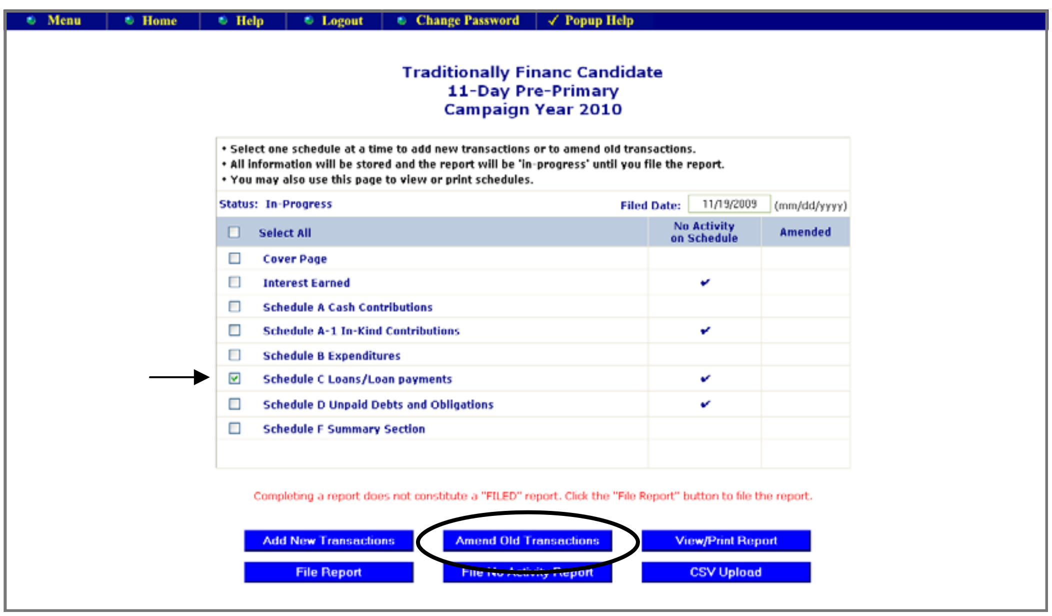
1. Select Schedule C on the report menu.
2. Click: "Add New Transaction."
3. Fill in the loan information. If you haven't made a payment yet, you're done.



To enter a **loan payment or to forgive part or all of the loan**:

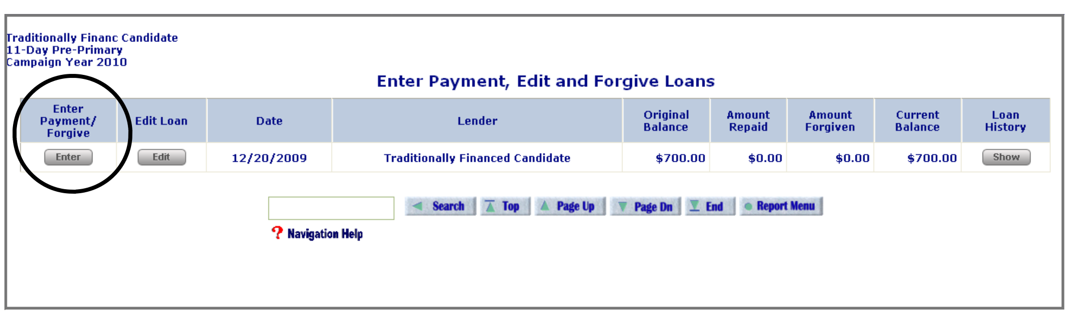
Select Schedule C on the report menu.

Click: "Amend Old Transactions."



Enter a payment or forgive an amount:

1. Click "Enter" under "Enter Payment/Forgive."

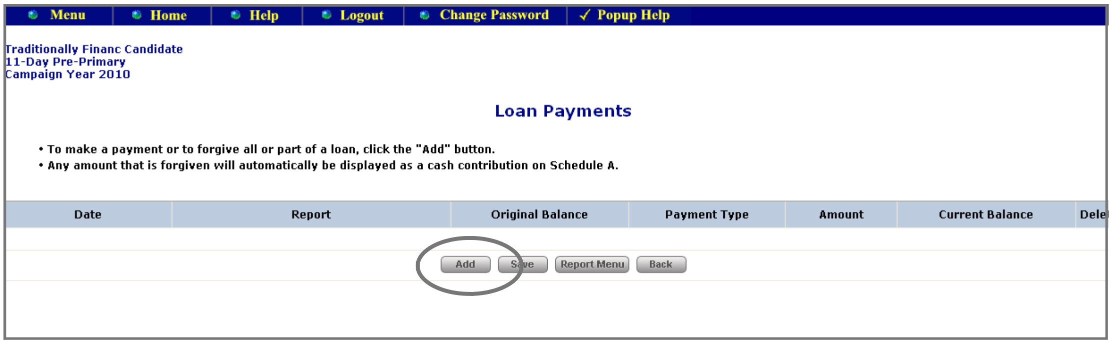


INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

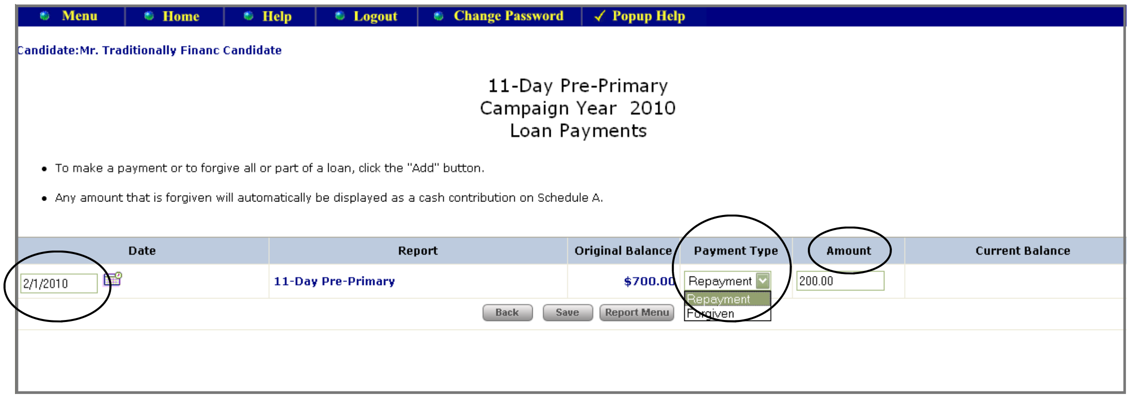
Entering Loan Payment or Forgiving a Loan (continued)

(Enter a payment/forgiven an amount continued)

2. Click “Add” button.



3. Enter date of payment or forgiveness.
4. Select “Repayment” or “Forgiven” from the list.
5. Enter amount.
6. Click: Save

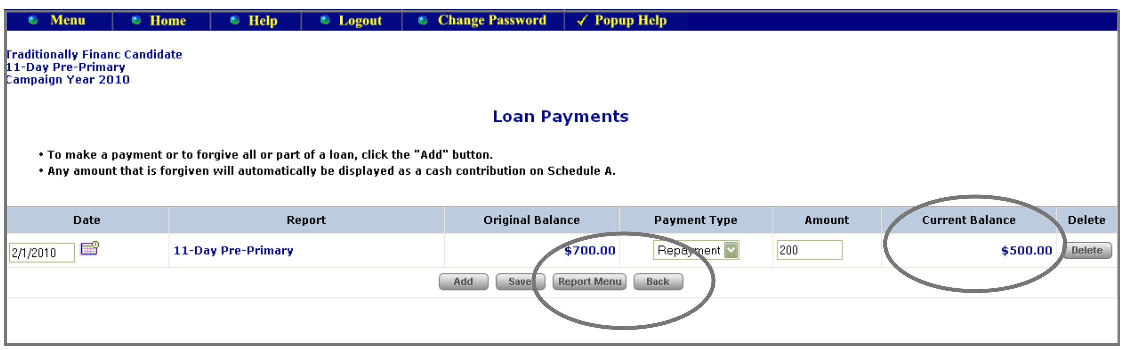


Note that current loan balance displays.

Click “Report Menu” if finished.

Or

Click “Back” and you return to the screen below.



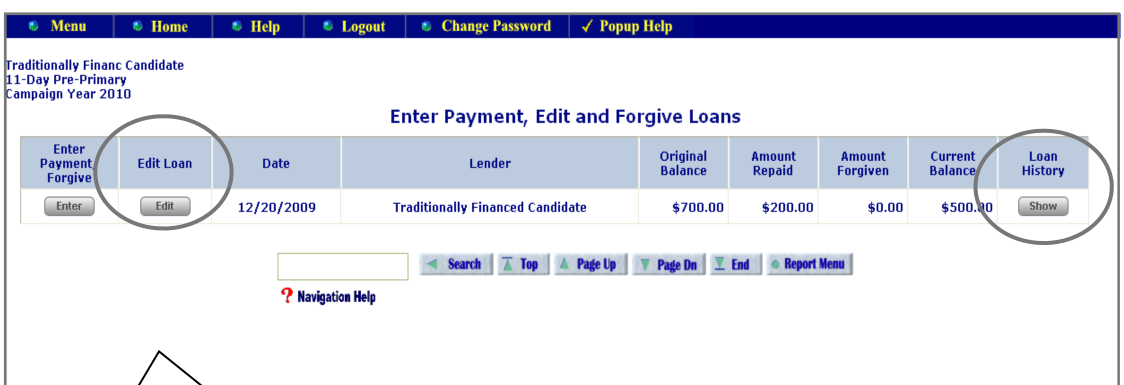
Viewing Loan History and Editing/Deleting a Loan

To view loan history:

Click “Show” under “Loan History” to see payment history.

To edit or delete a loan:

Click “Edit” under “Edit Loan.” On the next screen that displays make your changes. To save changes, click “Update.” Click “Delete” to delete the loan.



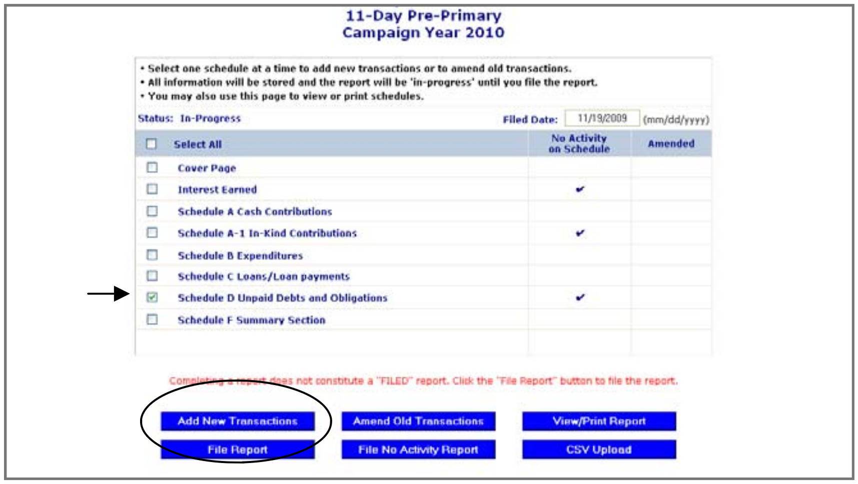
To edit a loan, you must be in the report in which you first reported (entered) the loan.

All Candidates: Entering Debts and Obligations on Schedule D

To enter a debt or obligation:

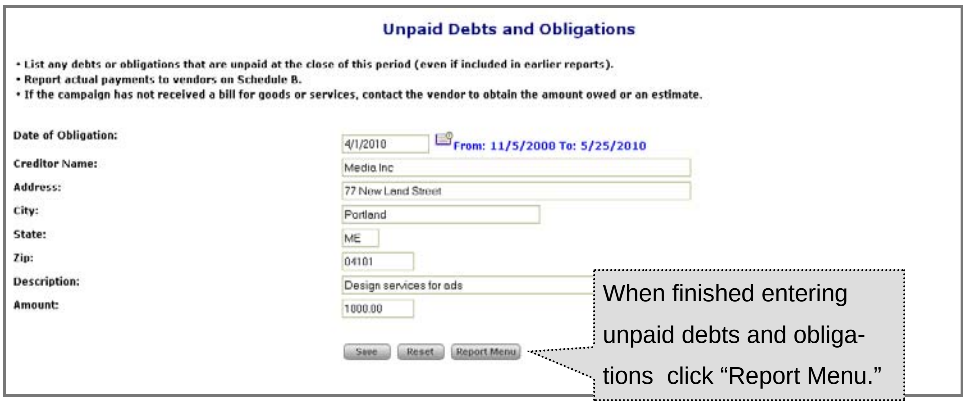
Select Schedule D on the report menu.

Click: "Add New Transaction."



Enter the information.

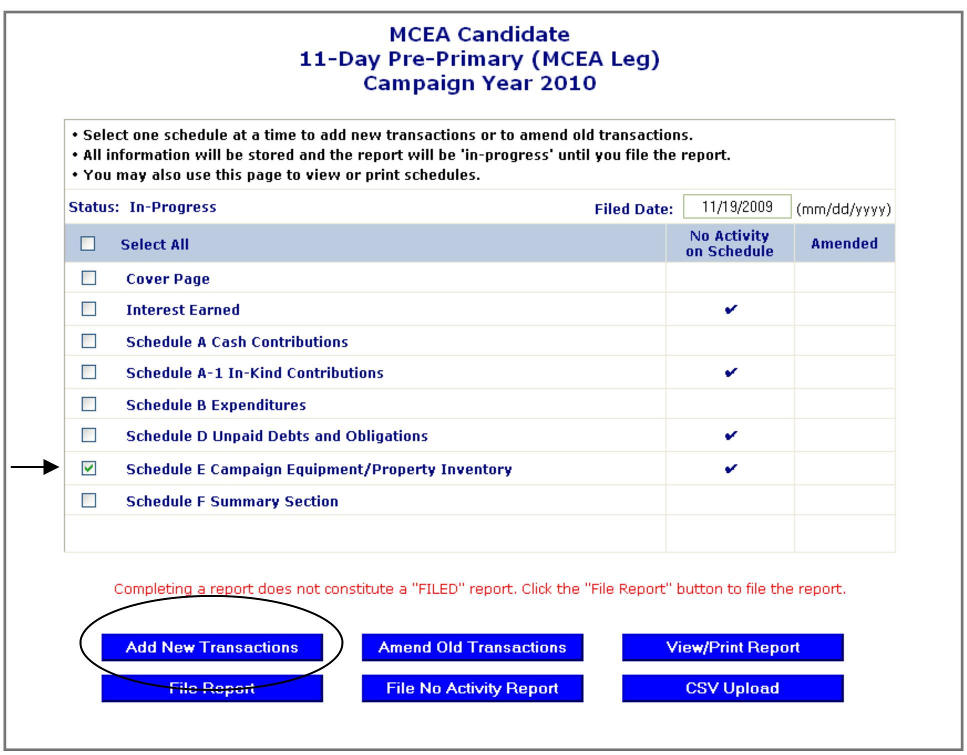
Click: Save



MCEA Candidates: Entering Equipment Purchases and Sales on Schedule E

To enter a **purchase:**

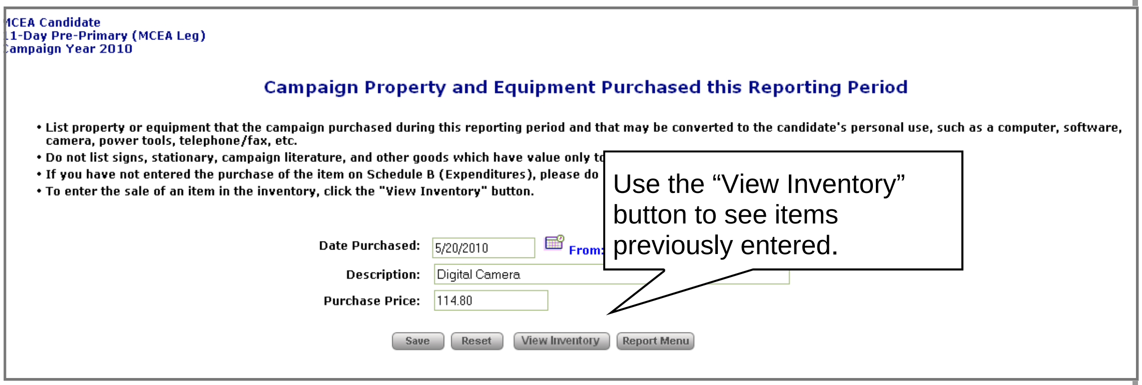
1. Select Schedule E on the report menu.
2. Click: "Add New Transaction."



INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

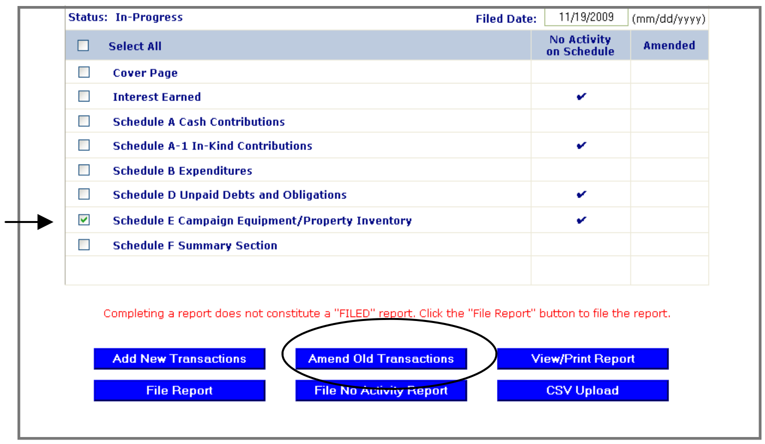
MCEA Candidates Only: Entering Equipment Purchases and Sales on Schedule E (continued)

3. Enter the date purchased.
4. Enter a description.
5. Enter purchase price
6. Click: Save

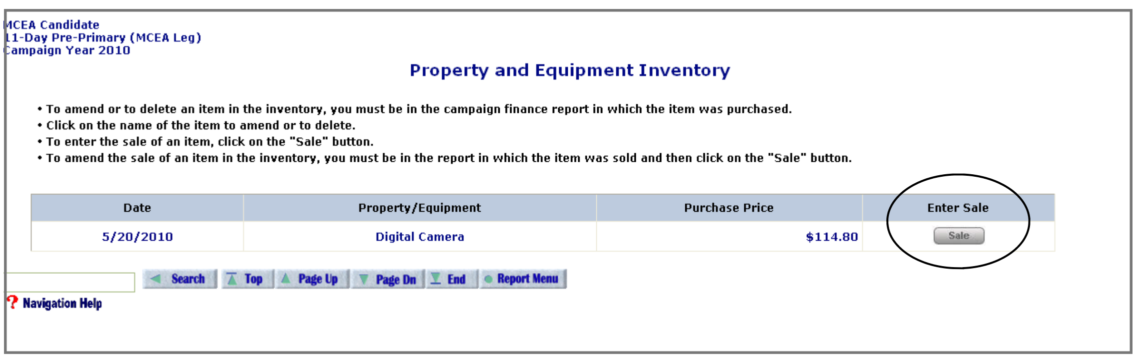


To enter a **sale of an item**:

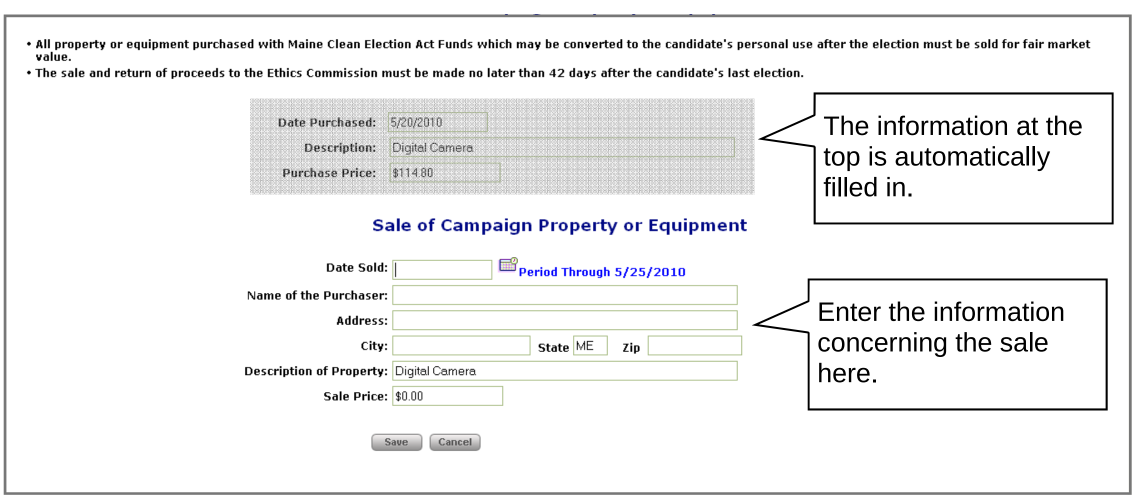
1. Select Schedule E on the report menu.
2. Click: "Amend Old Transactions."



3. Click: "Sale."



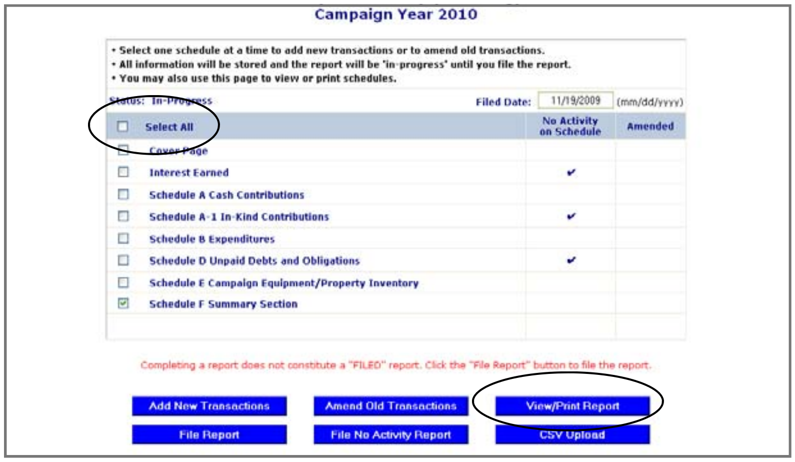
4. Enter the date sold.
5. Enter the name and address of the purchaser.
6. Some of the information is automatically filled in.
7. Enter the sale price.
8. Click: Save



INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

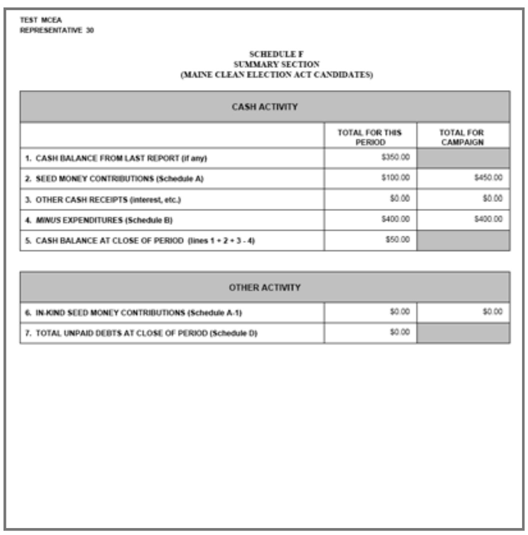
All Candidates: Reviewing Your Report Before Filing - including Schedule F, the summary page

1. Check “Select All.”
2. Click “View/Print Report.” This will open a PDF of your report.
3. Check the report for errors either by viewing it on your computer screen or printing a copy.



4. Check the amounts on Schedule F, the summary page for your campaign activity. Verify that the balance in your campaign bank account on the last day of the report period matches the cash balance on Schedule F.
5. Close the PDF window.

Summary page for traditionally financed candidate at right and for MCEA candidate below.

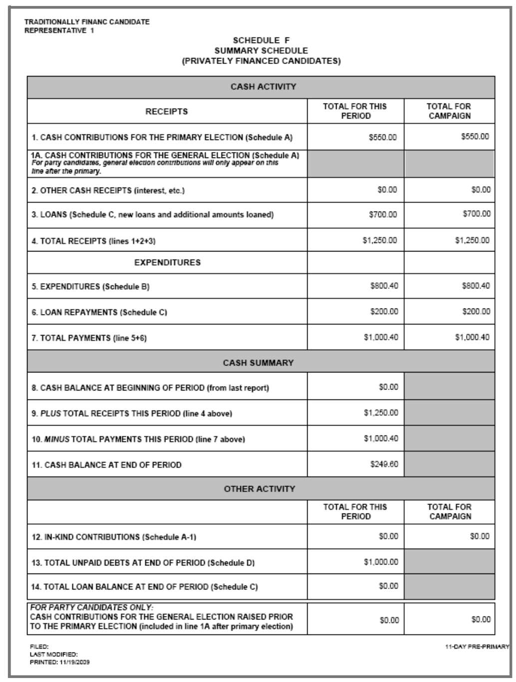


TEST MCEA
REPRESENTATIVE 30

SCHEDULE F
SUMMARY SECTION
(MAINE CLEAN ELECTION ACT CANDIDATES)

CASH ACTIVITY		
	TOTAL FOR THIS PERIOD	TOTAL FOR CAMPAIGN
1. CASH BALANCE FROM LAST REPORT (if any)	$350.00	
2. SEED MONEY CONTRIBUTIONS (Schedule A)	$100.00	$450.00
3. OTHER CASH RECEIPTS (interest, etc.)	$0.00	$0.00
4. *MINUS* EXPENDITURES (Schedule B)	$400.00	$400.00
5. CASH BALANCE AT CLOSE OF PERIOD (lines 1 + 2 + 3 - 4)	$50.00	

OTHER ACTIVITY		
6. IN-KIND SEED MONEY CONTRIBUTIONS (Schedule A-1)	$0.00	$0.00
7. TOTAL UNPAID DEBTS AT CLOSE OF PERIOD (Schedule D)	$0.00	



TRADITIONALLY FINANC CANDIDATE
REPRESENTATIVE 1

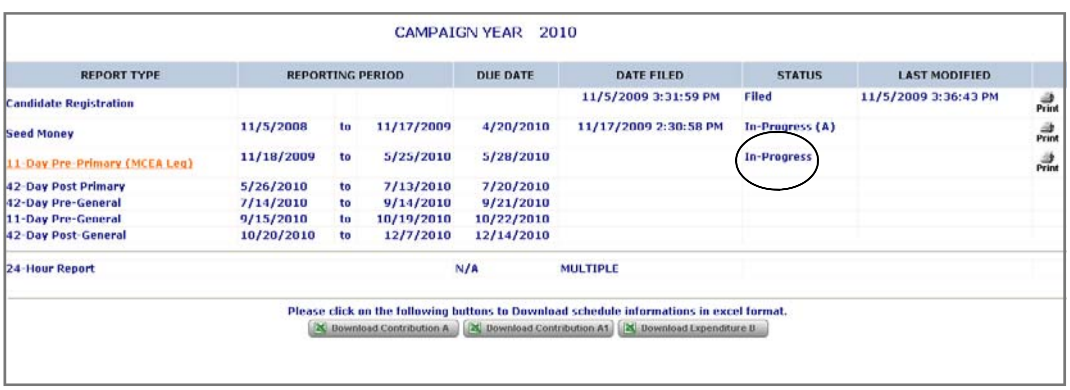
SCHEDULE F
SUMMARY SCHEDULE
(PRIVATELY FINANCED CANDIDATES)

CASH ACTIVITY		
RECEIPTS	TOTAL FOR THIS PERIOD	TOTAL FOR CAMPAIGN
1. CASH CONTRIBUTIONS FOR THE PRIMARY ELECTION (Schedule A)	$550.00	$550.00
1A. CASH CONTRIBUTIONS FOR THE GENERAL ELECTION (Schedule A) *For party candidates, general election contributions will only appear on this line after the primary.*		
2. OTHER CASH RECEIPTS (interest, etc.)	$0.00	$0.00
3. LOANS (Schedule C, new loans and additional amounts loaned)	$700.00	$700.00
4. TOTAL RECEIPTS (lines 1+2+3)	$1,250.00	$1,250.00
EXPENDITURES		
5. EXPENDITURES (Schedule B)	$800.40	$800.40
6. LOAN REPAYMENTS (Schedule C)	$200.00	$200.00
7. TOTAL PAYMENTS (line 5+6)	$1,000.40	$1,000.40
CASH SUMMARY		
8. CASH BALANCE AT BEGINNING OF PERIOD (from last report)	$0.00	
9. *PLUS* TOTAL RECEIPTS THIS PERIOD (line 4 above)	$1,250.00	
10. *MINUS* TOTAL PAYMENTS THIS PERIOD (line 7 above)	$1,000.40	
11. CASH BALANCE AT END OF PERIOD	$249.60	
OTHER ACTIVITY		
	TOTAL FOR THIS PERIOD	TOTAL FOR CAMPAIGN
12. IN-KIND CONTRIBUTIONS (Schedule A-1)	$0.00	$0.00
13. TOTAL UNPAID DEBTS AT END OF PERIOD (Schedule D)	$1,000.00	
14. TOTAL LOAN BALANCE AT END OF PERIOD (Schedule C)	$0.00	
FOR PARTY CANDIDATES ONLY: CASH CONTRIBUTIONS FOR THE GENERAL ELECTION RAISED PRIOR TO THE PRIMARY ELECTION (included in line 1A after primary election)	$0.00	$0.00

FILED:
LAST MODIFIED:
PRINTED: 11/19/2009

11-DAY PRE-PRIMARY

6. If you are not ready to file your report, go to your home page. You will see “In-Progress” displayed under Status” for the report.
7. If you are ready to file the report, go to the next section on page 15.



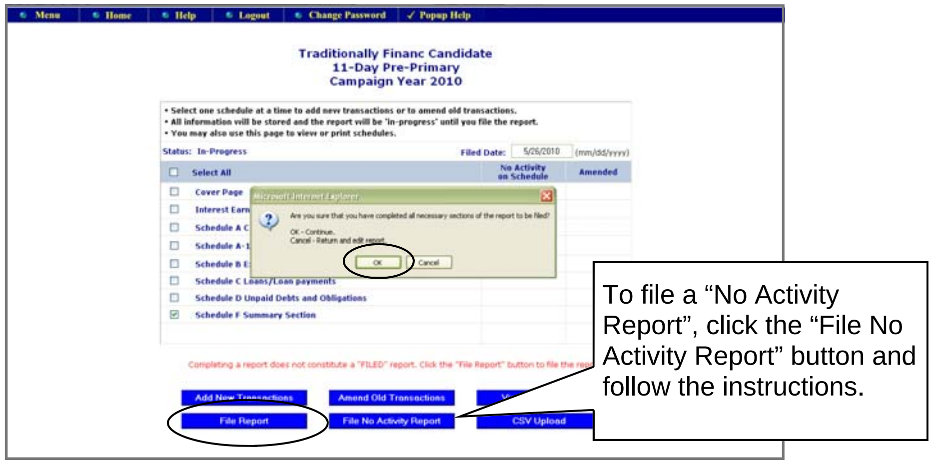
CAMPAIGN YEAR 2010

REPORT TYPE	REPORTING PERIOD			DUE DATE	DATE FILED	STATUS	LAST MODIFIED	
Candidate Registration					11/5/2009 3:31:59 PM	Filed	11/5/2009 3:36:43 PM	Print
Seed Money	11/5/2008	to	11/17/2009	4/20/2010	11/17/2009 2:30:58 PM	In-Progress (A)		Print
11-Day Pre-Primary (MCEA Leg)	11/18/2009	to	5/25/2010	5/28/2010		In-Progress		Print
42-Day Post Primary	5/26/2010	to	7/13/2010	7/20/2010				
42-Day Pre-General	7/14/2010	to	9/14/2010	9/21/2010				
11-Day Pre-General	9/15/2010	to	10/19/2010	10/22/2010				
42-Day Post-General	10/20/2010	to	12/7/2010	12/14/2010				
24-Hour Report				N/A	MULTIPLE			

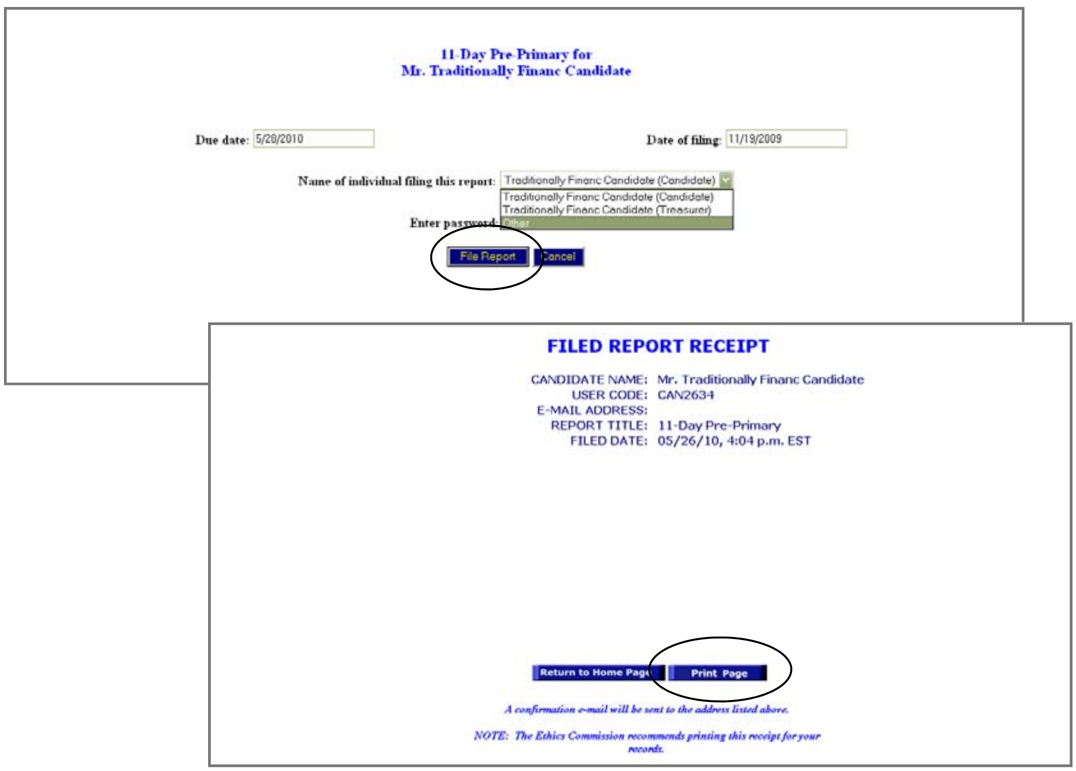
Please click on the following buttons to Download schedule informations in excel format.
Download Contribution A | Download Contribution A1 | Download Expenditure B

All Candidates: Filing Your Report

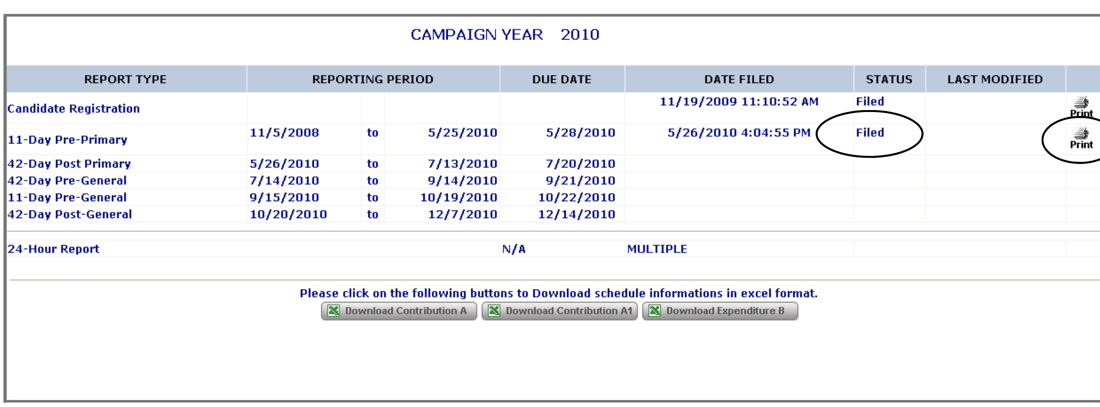
1. Click "File Report" button.
2. Click "OK" in pop-up box.



3. Enter your name (person filing the report) either by selecting your name from the list box or selecting "Other" and typing your name in the field.
4. Enter your password.
5. Click "File Report" button.
6. You may print the "Filed Report Receipt." We recommend that you print this page for your records.



7. Return to your home page to verify that your report was filed successfully. "Filed" displays in column labeled "Status."
8. To print a copy of your <u>filed</u> report, click on the printer icon at the right and see page 16.

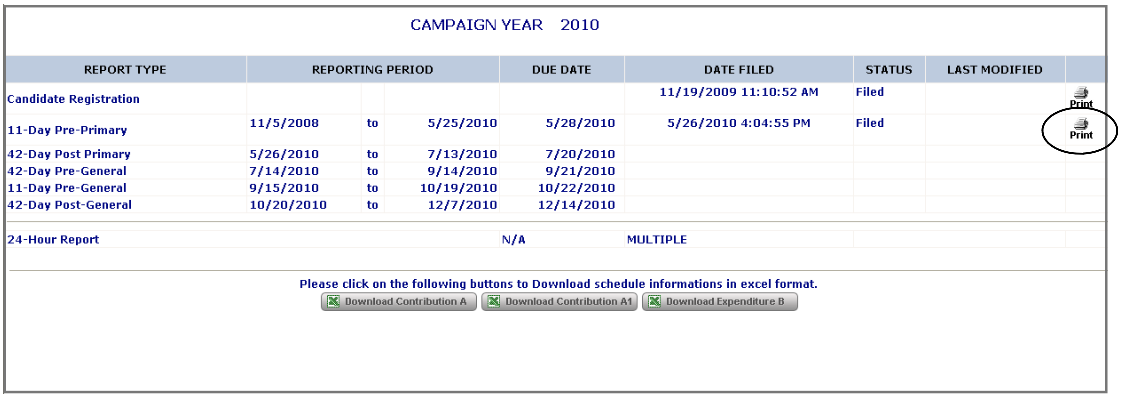


INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

All Candidates: Viewing and printing your filed report

1. On your home page, click the printer icon.

(Please note: When you click on the report name of a filed report, you will be asked if you want to amend the report. If you're not amending the report, click "No" and click on the printer icon.)

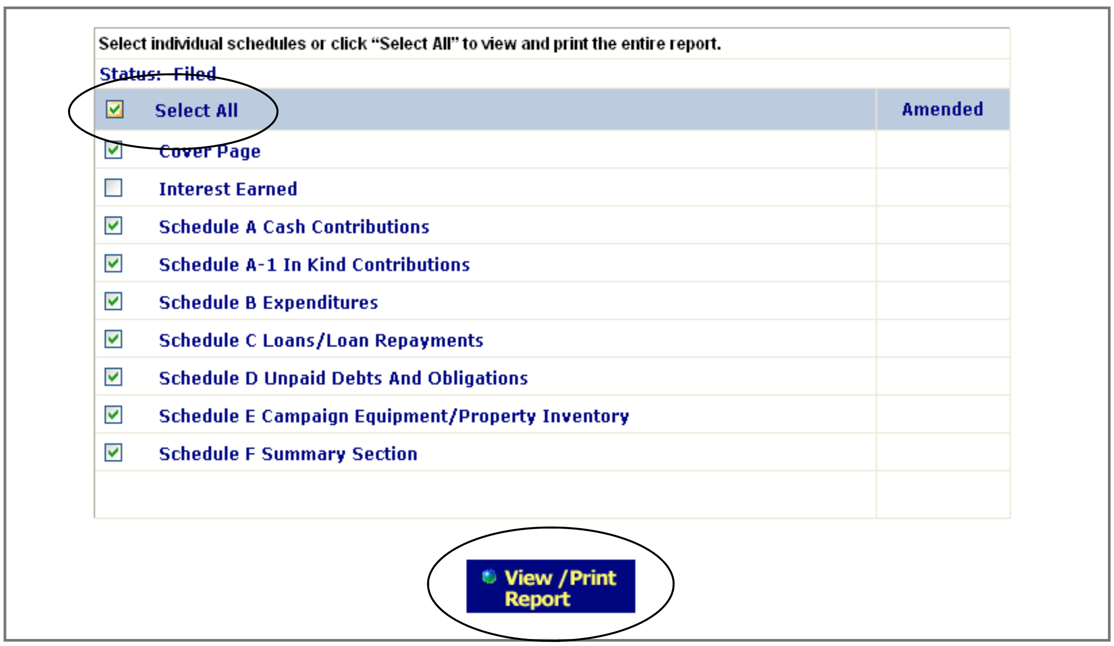


2. To view or print the whole report, check "Select All."

   Or you can view or print a schedule(s) by checking those schedules.

3. Click "View/Print Report."

4. A PDF file of your report will open.



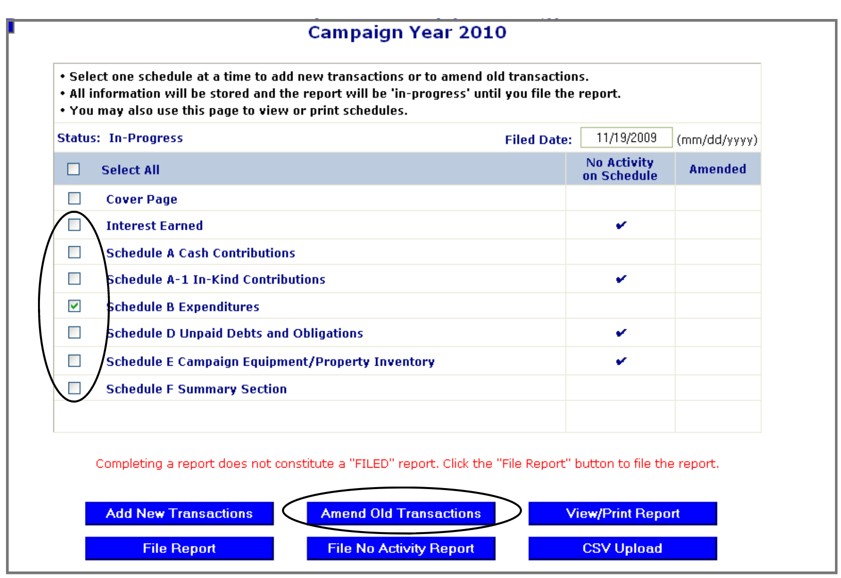
All Candidates: Amending Information Entered into a Report

1. On the Report Menu, select the schedule you want to amend.

2. Click "Amend Old Transactions"

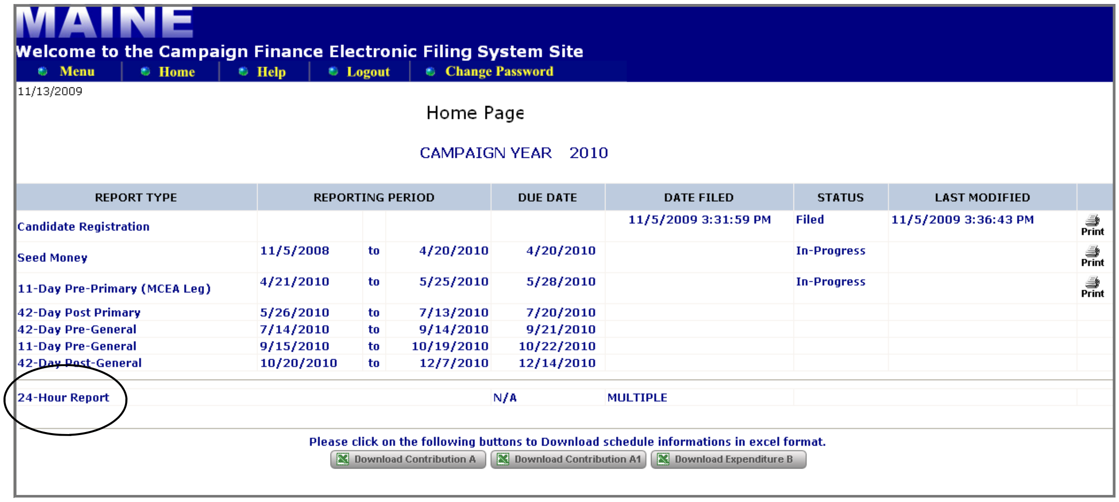
3. All of the transactions for your entire campaign display on the next screen(s).

4. Click on the name of the entry you want to amend and follow the instructions.

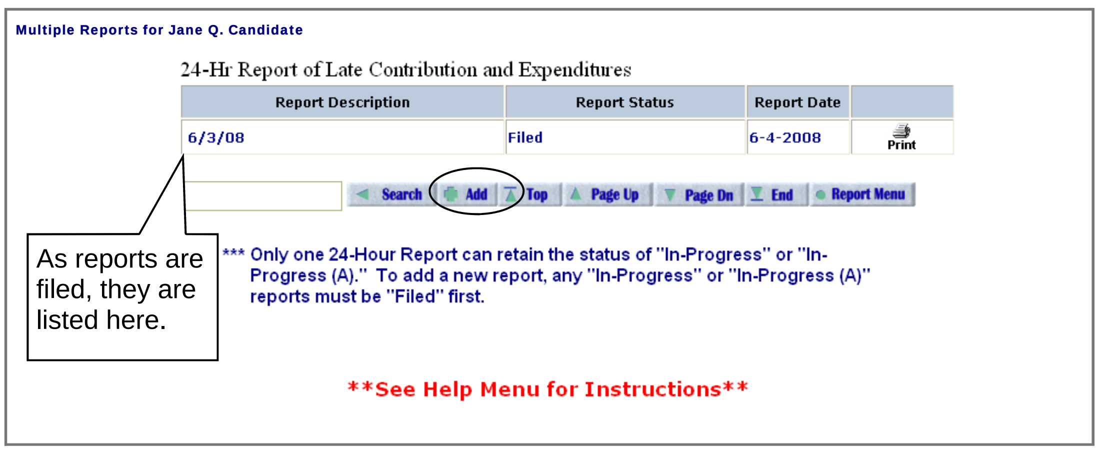


All Candidates: Filing 24-Hour Report

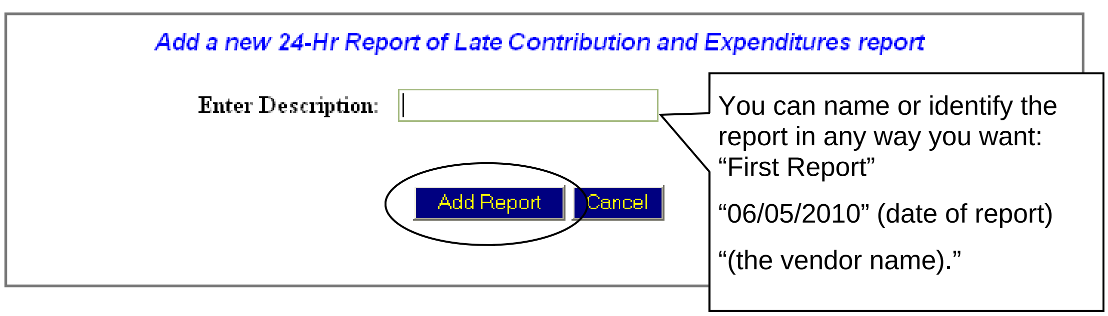
1. On your Home Page, click on "**24 Report**."



2. If this is the first report you are filing, there will be no reports listed. Click on **"Add"** to add a report.

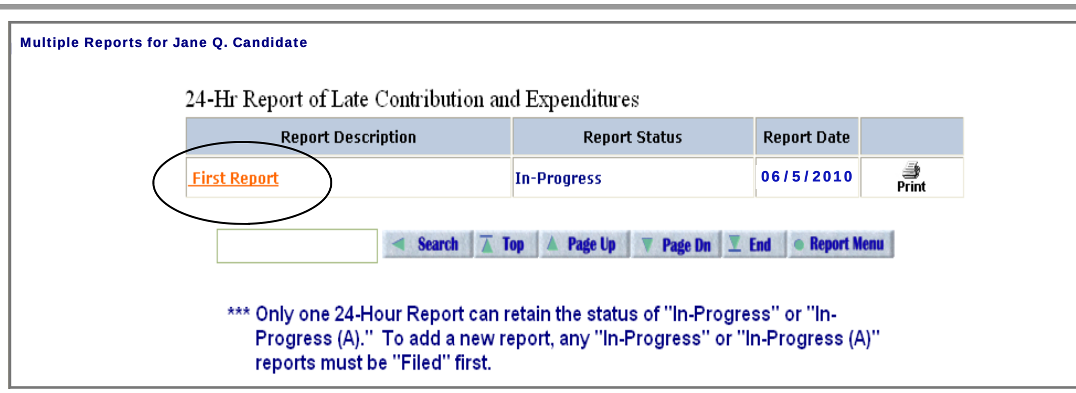


3. Name the report by entering a description and click "**Add Report.**"



4. Click on the report name ("First Report").

This will bring you to the report menu.

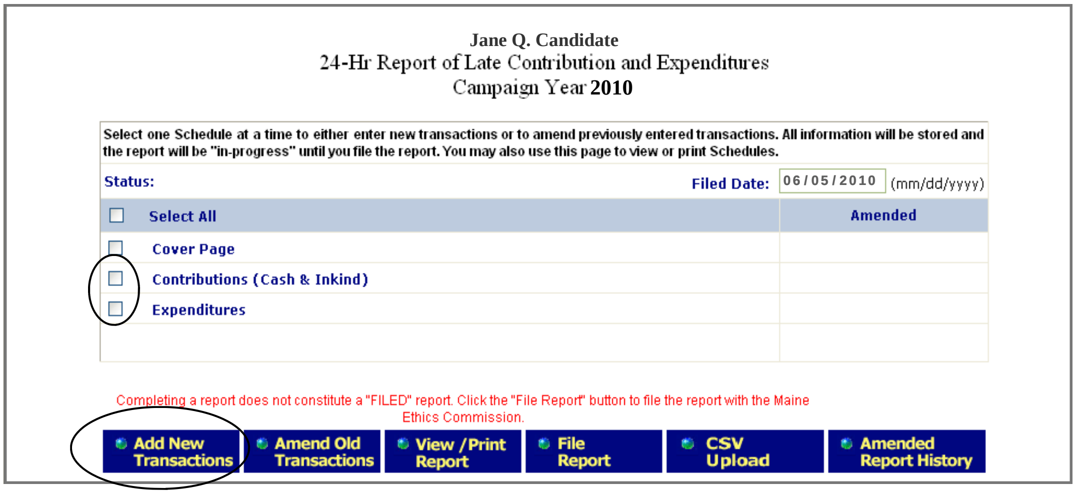


INSTRUCTIONS FOR THE CAMPAIGN FINANCE E-FILING SYSTEM

All Candidates: Filing 24-Hour Report

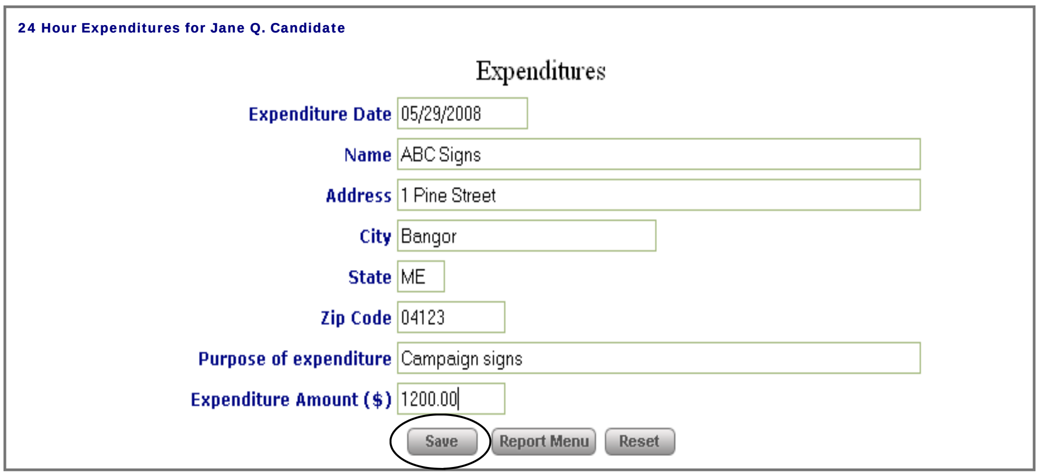
5. Select the correct schedule, "Contributions" or "Expenditures."

6. Then click on "Add New Transactions."



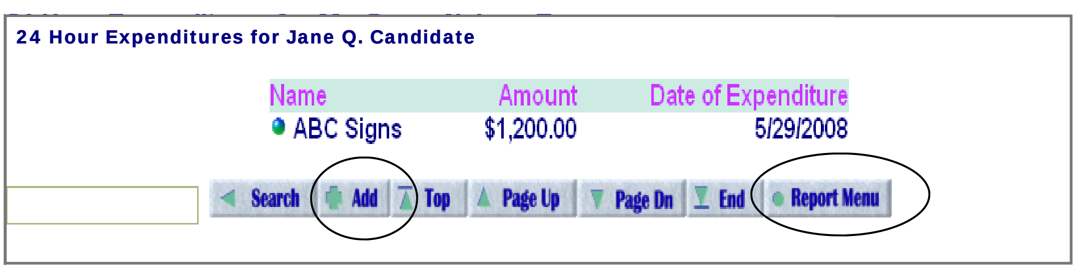
7. Enter the information.

8. Click: 



9. If you have another entry to report (in this example another expenditure), click on the "Add" button.

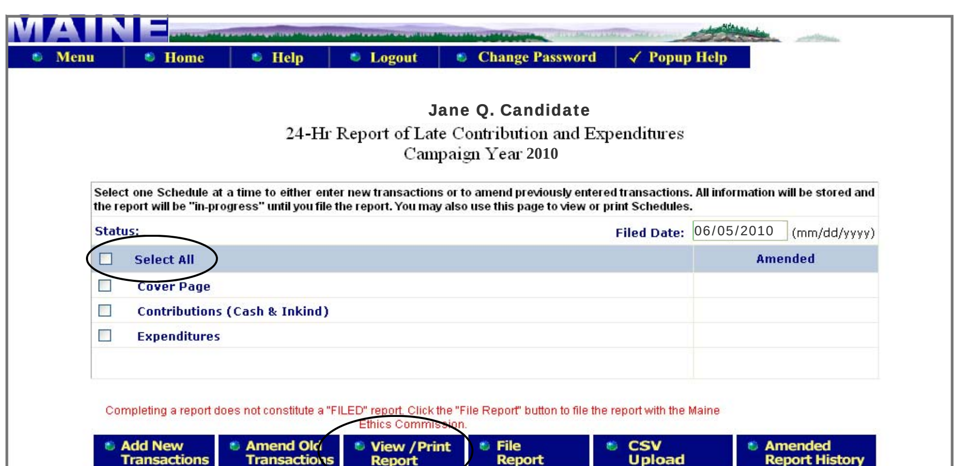
10. When you have entered the information, click the "Report Menu" button.



10. Check "Select "All" and click "View/Print".

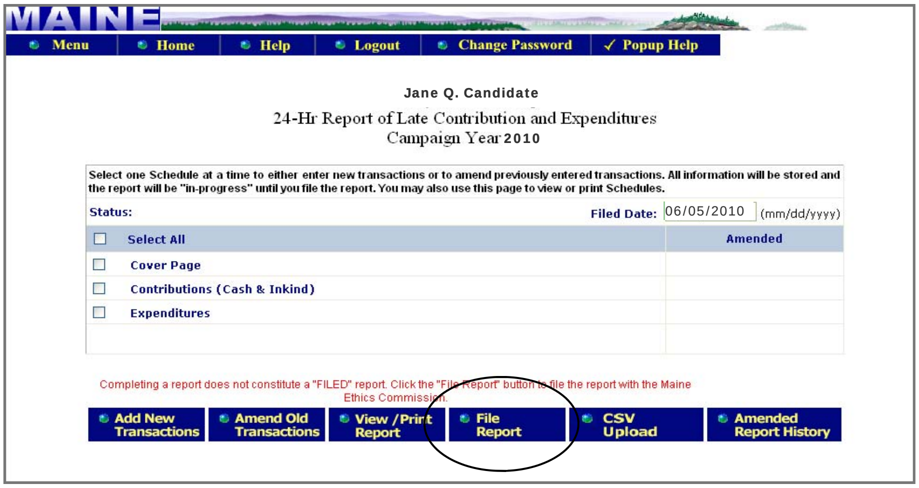
This brings up a PDF of your report that you can review prior to filing.

Close the PDF file, which brings you to the report menu for the 24 hour report you are filing.



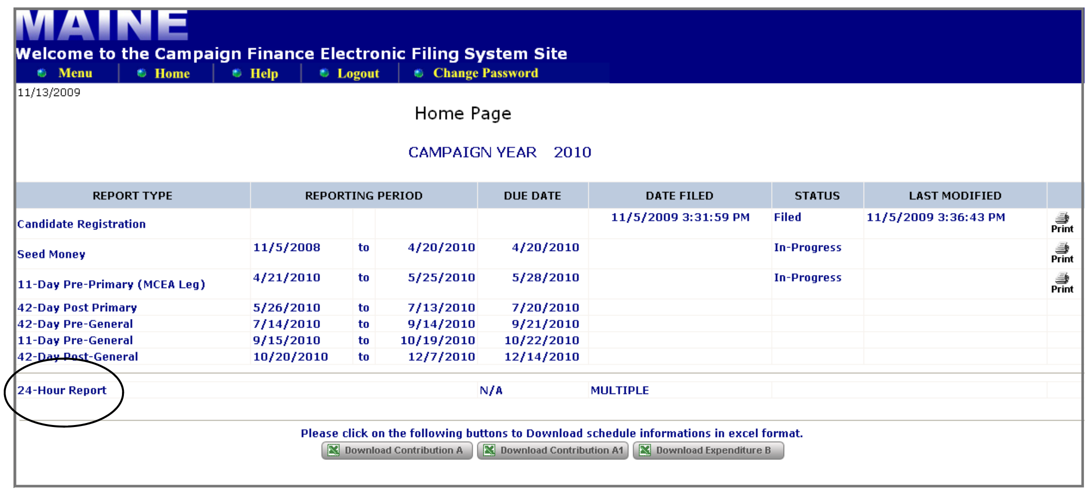
All Candidates: Filing 24-Hour Report

11.Click “File Report” and follow the instructions.

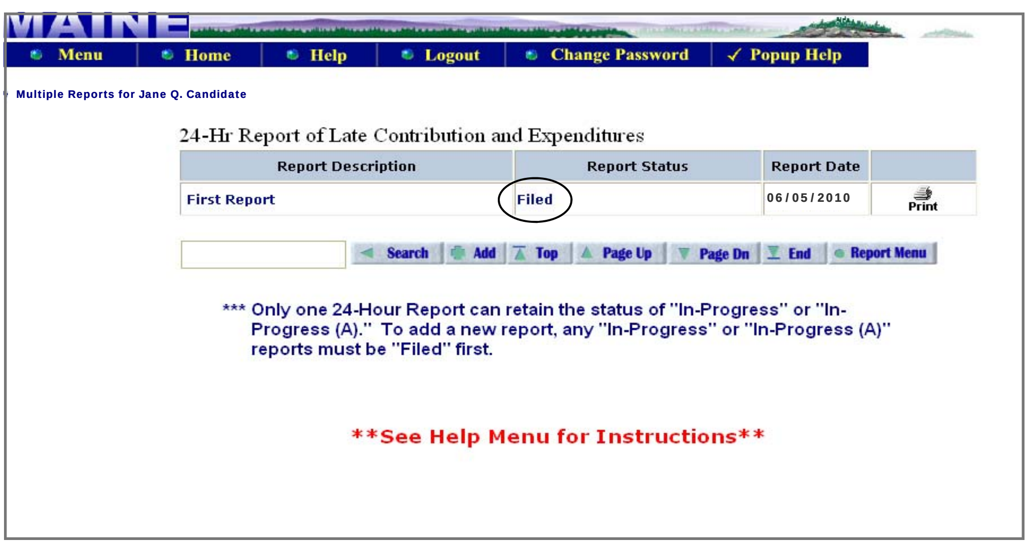


12. To check the status of the 24 hour report you filed, go to your home page.

13. Click on “24 Hour Reports of Late Contributions and Expenditures.”

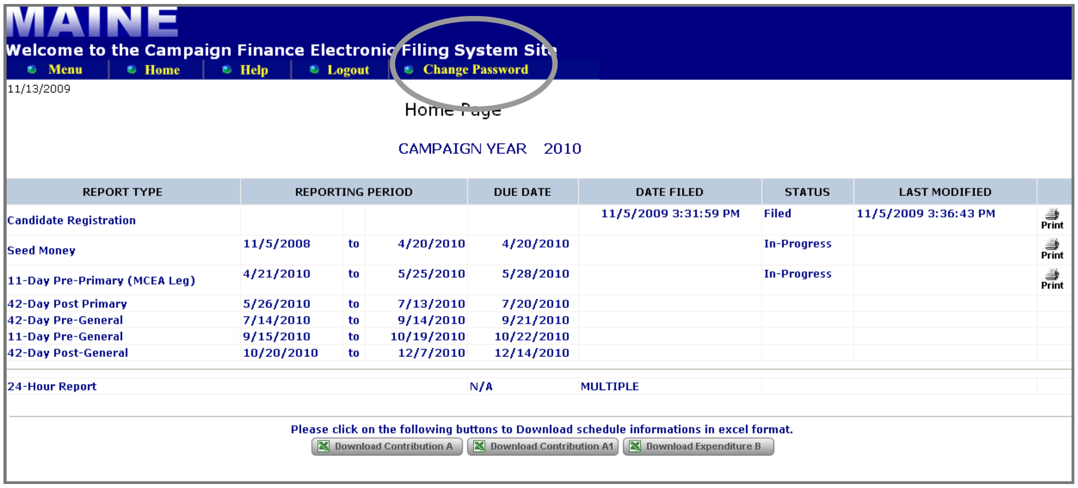


14. “Filed” in “Report Status” column displays for filed reports.



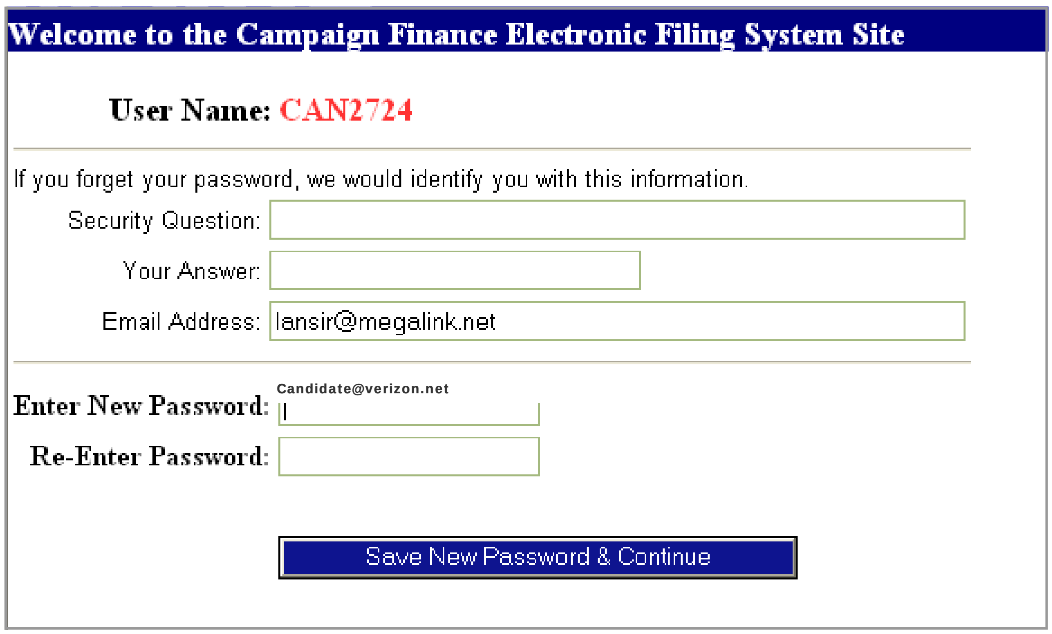
All Candidates: Changing your password

1. On your home page, click "Change Password" on the top menu bar.



2. Enter the information on the next screen (at right).

3. Click "Save New Password & Continue" button.



For MCEA candidates: Use your <u>e-filing</u> "User ID" and password to log into the Commission's Online Qualifying Contribution website:

http://www.maine.gov/online/ethics/cleanelection

1. Click "Candidate Login."

2. Enter your user ID and password in pop-up box. <u>Password is case sensitive.</u>

3. Click "OK."