



OFFICE OF THE CITY CLERK CITY OF SAN ANTONIO CAMPAIGN FINANCE ELECTRONIC FILING SYSTEM

USER'S GUIDE CREATING PACKET

Campaign Finance Reporting System Instructions

1. Creating a New Account
2. Creating Packet
3. Importing/Upload and Templates
4. Carry Forward Feature
5. Creating Correction Affidavit
6. Closing Out
7. Managing Address Book

Accessing Campaign Finance Electronic Filing System



The screenshot shows the login interface for the Campaign Finance Electronic Filing System. At the top left is the system logo, which includes a seal and the text "Campaign Finance ELECTRONIC FILING SYSTEM". To the right of the logo is a "Sign On" link. Below the logo is a "Help" link. The main login area contains two input fields: "User ID/Email:" and "Password:". Below the password field is a "Forgot Password?" link. A "Sign On" button is positioned below the links. At the bottom of the login area is a "Create New Account?" link. At the very bottom of the page are three links: "Home", "Privacy Policy and Disclaimer", and "Site Map".

Campaign Finance
ELECTRONIC FILING SYSTEM

Sign On

[Help](#)

User ID/Email:

Password:

[Forgot Password?](#)

[Create New Account?](#)

[Home](#) | [Privacy Policy and Disclaimer](#) | [Site Map](#)

1. Enter <https://webapp5.sanantonio.gov/campfin/> to access the System.

Creating a New Account

1. To create an account in the Campaign Finance Electronic Filing System Click on “Create New Account.”



Campaign Finance
ELECTRONIC FILING SYSTEM

[Sign On](#)

[Help](#)

User ID/Email:

Password:

[Forgot Password?](#)


[Create New Account?](#)

[Home](#) | [Privacy Policy and Disclaimer](#) | [Site Map](#)

Complete Account Information

1. Complete requestor, candidate, and treasure information.

*Required Fields

Apply for New Account
[Help](#)

We are experiencing technical difficulties. (L281)The underlying connection was closed: An unexpected error occurred on a receive.

Create Account

Your First Name* Middle Name Last Name*

Your Email Address*

Phone* () -

Name of Candidate or PAC* Phone* () -

Candidate/PAC Email Address*

Name of Campaign Treasurer* Phone* () -

Treasurer Email Address*

Complete Account Information

2. Continue entering security questions and password.
3. Click on the *Continue* button to send your request to the Office of the City Clerk.
4. An email will be sent to the email address on file when the request is finalized.

Security Question 1*

Security Answer 1*

Security Question 2*

Security Answer 2*

Password*

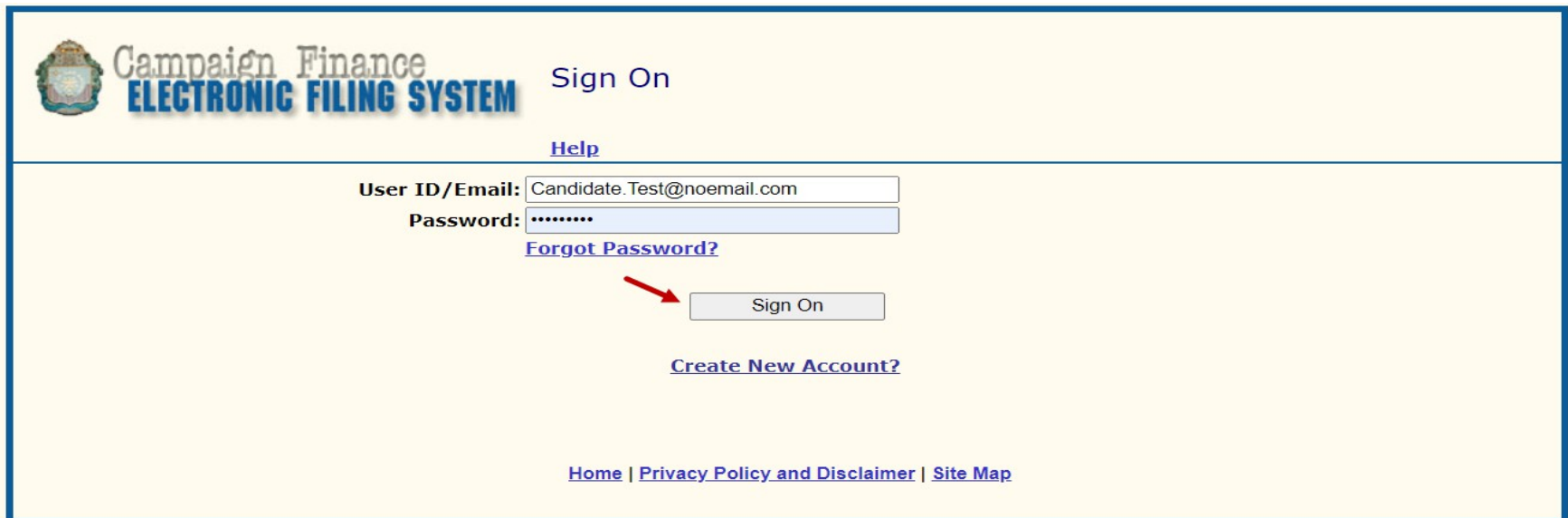
Confirm Password*

Password Check List

- ✓ 8 characters requirement met
- ✓ one uppercase requirement met
- ✓ one lowercase requirement met
- ✓ one digit requirement met
- ✓ one special character requirement met

Sign-On to the Campaign Finance Electronic Filing System

1. Enter email address for the User ID/Email and Password. Click on the *Sign On* button.



The screenshot shows the login interface for the Campaign Finance Electronic Filing System. At the top left is the system logo, which includes a state seal and the text "Campaign Finance ELECTRONIC FILING SYSTEM". To the right of the logo is a "Sign On" link. Below this is a "Help" link. The main login area contains two input fields: "User ID/Email:" with the value "Candidate.Test@noemail.com" and "Password:" with masked characters "*****". Below the password field is a "Forgot Password?" link. A red arrow points to the "Sign On" button. Below the button is a "Create New Account?" link. At the bottom of the page are links for "Home", "Privacy Policy and Disclaimer", and "Site Map".

Campaign Finance
ELECTRONIC FILING SYSTEM

[Sign On](#)

[Help](#)

User ID/Email:

Password:

[Forgot Password?](#)

[Sign On](#)

[Create New Account?](#)

[Home](#) | [Privacy Policy and Disclaimer](#) | [Site Map](#)

Create Packet

**Campaign Finance
ELECTRONIC FILING SYSTEM**

Main Menu
[Log off](#) [Help](#)

[Change Group](#) [Change Password](#)

TEST

Create New Packet

☒ COH
☐ SPAC
☐ UC

☒ January 15 Semi-Annual 2011
☐ 30th Day Before General Election 2011
☐ 8th Day Before General Election 2011
☐ 3rd day Before General Election 2011
☐ July 15: Semi-Annual 2011
☐ 15 days after Campaign Treasurer Appointment
☐ Exceeded \$500 limit
☐ Final Report COH

Create Packet

Incomplete Packets

8

1. To create a new packet, select Report Type COH.
2. Select Report.
3. Select "Create Packet."

Cover Sheet 1

Candidate/Officeholder Information



Campaign Finance
ELECTRONIC FILING SYSTEM

Candidate/OfficeHolder Campaign Finance Report CS1

[Log off](#) [Help](#)

COH: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

CS1

[Select Candidate/Officeholder](#) Change Of Address ☐

Candidate/Officeholder Name:

Title:

First Name: MI:

Nickname: Last Name: Suffix:

Candidate/Officeholder Mailing Address:

Street No: Street Name: Apt/Suite:

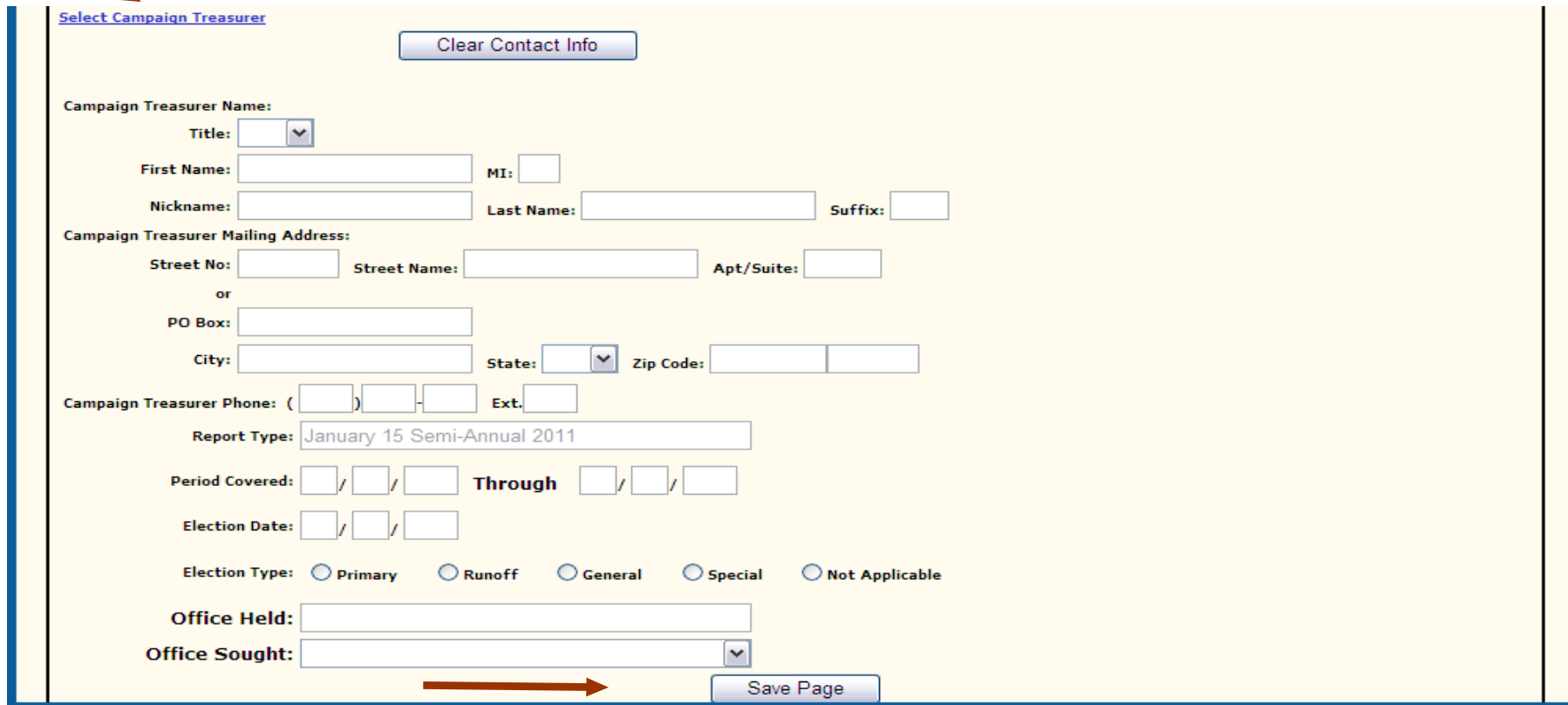
or

PO Box:

1. To begin report, enter contact information for Candidate/Officeholder OR click on “Select Candidate/ Officeholder” hyperlink.

Cover Sheet 1

Campaign Treasurer Information



[Select Campaign Treasurer](#)

Campaign Treasurer Name:

Title:

First Name: MI:

Nickname: Last Name: Suffix:

Campaign Treasurer Mailing Address:

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

Campaign Treasurer Phone: () - Ext.

Report Type:

Period Covered: / / Through / /

Election Date: / /

Election Type: ☐ Primary ☐ Runoff ☐ General ☐ Special ☐ Not Applicable

Office Held:

Office Sought:

1. Enter contact information for Campaign Treasurer OR click on “Select Campaign Treasurer” hyperlink.
2. Save data by selecting “Save Page.”

Record Added and Navigating Report

The screenshot displays the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top, it says 'Candidate/OfficeHolder Campaign Finance Report CS1'. Below this are links for 'Log off' and 'Help'. A navigation bar includes 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. A series of links for different report sections are shown: 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below these are 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red arrow points to the 'SchT' link. A red message 'Record Added' is displayed above the main form area. The form contains fields for 'Select Candidate/Officeholder', 'Change Of Address' (with a checkbox), 'Change Contact Info', and 'Clear Contact Info'. It also has sections for 'Candidate/Officeholder Name' (with fields for Title, First Name, Nickname, MI, Last Name, and Suffix) and 'Candidate/Officeholder Mailing Address' (with fields for Street No, Street Name, and Apt/Suite).

1. As contact information for the Candidate/Officeholder AND Campaign Treasurer is successfully saved, “**Record Added**” will be displayed at the top of the page.
2. In addition, Cover Sheet 2 and Report Schedules will be displayed at the top of the page.

Coversheet 1

Notice of Direct Campaign Expenditures by Other Individuals – Correcting Errors

The screenshot displays the 'Candidate/OfficeHolder Campaign Finance Report CS1' interface. At the top, there is a logo for 'Campaign Finance ELECTRONIC FILING SYSTEM' and a title bar. Below the title bar, there are navigation links: 'Log off' and 'Help'. A menu bar contains links for 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. A secondary menu bar lists various report types: 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below this, there are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red error message is displayed: 'Candidate/OfficeHolder Street No is a required field'. The form itself has a section for 'Select Candidate/Officeholder' with a 'Change Of Address' checkbox and a 'Clear Contact Info' button. The 'Candidate/Officeholder Name' section includes fields for 'Title', 'First Name' (filled with 'Joe'), 'MI', 'Nickname', 'Last Name' (filled with 'Candidate'), and 'Suffix'. The 'Candidate/Officeholder Mailing Address' section includes fields for 'Street No', 'Street Name' (filled with 'Victory Lane'), and 'Apt/Suite'. There is also a 'or' option for an alternative address.

1. If record was not successfully added, the User will see an error message at the top of the page. Error messages (which will be highlighted in red) will indicate what information is missing and/or needs correcting.
2. Enter required data and select "Save."


Coversheet 1

Notice of Direct Campaign Expenditures by Other Individuals

Notice of Direct Campaign Expenditure By Other Individuals
** Direct campaign expenditures are campaign expenditures made by others without the candidate's prior consent or approval. Candidates are required to disclose this information only if they receive notification of the direct campaign expenditure.**

[Select Campaign Expenditure By Other Individual](#)

Individuals Name:
Title: First Name: MI:
Last Name: Suffix:
Other Name:

Individuals Address:
Street No: Street Name: Apt/Suite:
or
PO Box:
City: State: Zip Code:


1. If Direct Campaign Expenditures by Other Individuals does not apply, go directly to Coversheet 2 **without** saving.

Coversheet 1

Notice of Direct Campaign Expenditures by Other Individuals – Entering Data, if applicable

Notice of Direct Campaign Expenditure By Other Individuals
** Direct campaign expenditures are campaign expenditures made by others without the candidate's prior consent or approval. Candidates are required to disclose this information only if they receive notification of the direct campaign expenditure.**

[Select Campaign Expenditure By Other Individual](#)

Individuals Name:
Title: First Name: MI:
Last Name: Suffix:
Other Name:

Individuals Address:
Street No: Street Name: Apt/Suite:
or
PO Box:
City: State: Zip Code:

1. If you **do** have entries, enter contact information OR click on “Select Campaign Expenditure By Other Individual” hyperlink.
2. Save data by selecting “Save.”

Coversheet 1

Notice of Direct Campaign Expenditures by Other Individuals – Saved Data, if applicable

The screenshot displays the 'Candidate/OfficeHolder Campaign Finance Report CS1' page. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right of the logo are links for 'Log off' and 'Help'. Below the header, there is a navigation bar with links: 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. A secondary navigation bar contains links for various report types: 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below these are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red message banner at the top of the main content area reads 'Expenditure Record Added'. The main form area contains a 'Select Candidate / Officeholder' link, a 'Change Of Address' checkbox, and a 'Clear Contact Info' button. The form fields are organized into two sections: 'Candidate / Officeholder Name:' and 'Candidate / Officeholder Mailing Address:'. The name section includes fields for Title (a dropdown menu), First Name (containing 'Joe'), MI (a small box), Nickname, Last Name (containing 'Candidate'), and Suffix. The mailing address section includes fields for Street No., Street Name (containing 'Victory Lane'), and Apt / Suite. Below the address fields is the word 'or'.

1. As contact information for Direct Campaign Expenditure data is successfully saved, “**Expenditure Record Added**” will be displayed at the top of the page.

Coversheet 2

Notice of Direct Campaign Expenditures From Political Committees

Notice From Political Committee(s)
** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such expenditures. **

Committee Type:

[Select Committee](#)

Committee Name

Committee Address

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

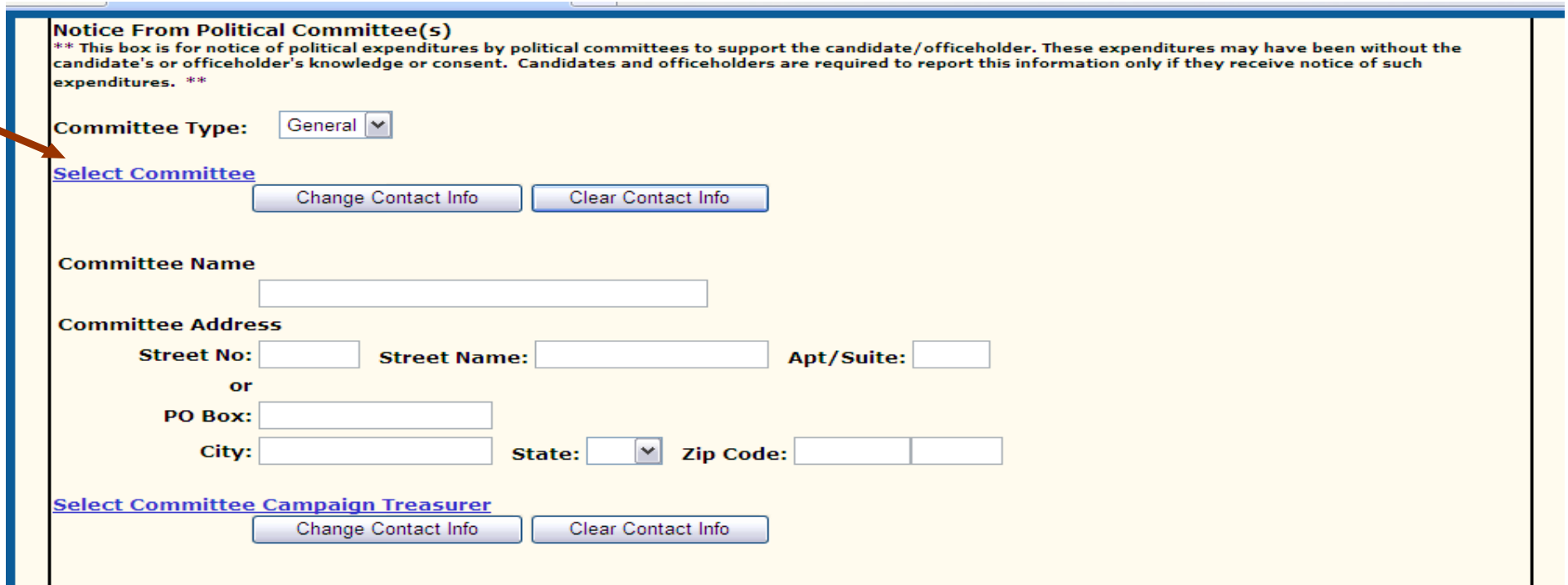
[Select Committee Campaign Treasurer](#)

1. If Direct Campaign Expenditures by Political Committee does not apply, go directly to Schedule A **without** saving.

Coversheet 2

Notice of Direct Campaign Expenditures

From Political Committees – Entering Data, if applicable



Notice From Political Committee(s)
** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such expenditures. **

Committee Type:

[Select Committee](#)

Committee Name

Committee Address
Street No: **Street Name:** **Apt/Suite:**
or
PO Box:
City: **State:** **Zip Code:**

[Select Committee Campaign Treasurer](#)

1. If you do have entries, enter contract information for Committee Campaign Treasurer OR click on “Select Committee” hyperlink.

Coversheet 2

Notice of Direct Campaign Expenditures by Political Committees – Saved Data

Add Notice From Political Committees

Clear

1. Save data by selecting “Add Notice From Political Committees.”



Campaign Finance
ELECTRONIC FILING SYSTEM

Candidate/Officeholder Report: Support & Totals CS2

[Log off](#) [Help](#)

COH: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

Record Added

C/OH Name: Joe Candidate

Notice From Political Committee(s)

** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such

1. Once data is successfully saved, “**Record Added**” will be displayed at the top of the page.

Coversheet 2

Notice of Direct Campaign Expenditures From Political Committees – Saved Data

Add Notice From Political Committees

Clear

Committee Type	Committee Name	Committee Address	Campaign Treasurer Name	Campaign Treasurer Address	Created Date	Edit	Delete
G	Joe for a Better San Antonio	100 Victory Lane San Antonio, TX 78200	Joleen Candidate	100 Victory Lane San Antonio, TX 78200	4/21/2011 6:11:34 PM	Edit	Delete
1							

1. Data successfully saved will be displayed at the bottom of the page.

Coversheet 2

Totals

Contribution Totals

Total Political Contributions of \$50 or less
(Other than pledges, loans, or guarantees of loans), unless itemized: \$ Applicant Filled ←

Total Political Contributions
(Other than pledges, loans, or guarantees of loans): \$

Expenditure Totals

Total political expenditures of \$50 or less, unless itemized: \$ Applicant Filled ←

Total Political Expenditures: \$

Contribution Balance

Total political contributions maintained as of the last day of reporting period: \$ Applicant Filled ←

Outstanding Loan Totals

Total principal amount of all outstanding loans as of last day of the reporting period. \$ Applicant Filled ←

1. Enter data for “Applicant Filled” fields (unitemized political contributions and expenditures as well as contribution balance).
2. Save data by selecting “Save Page.”

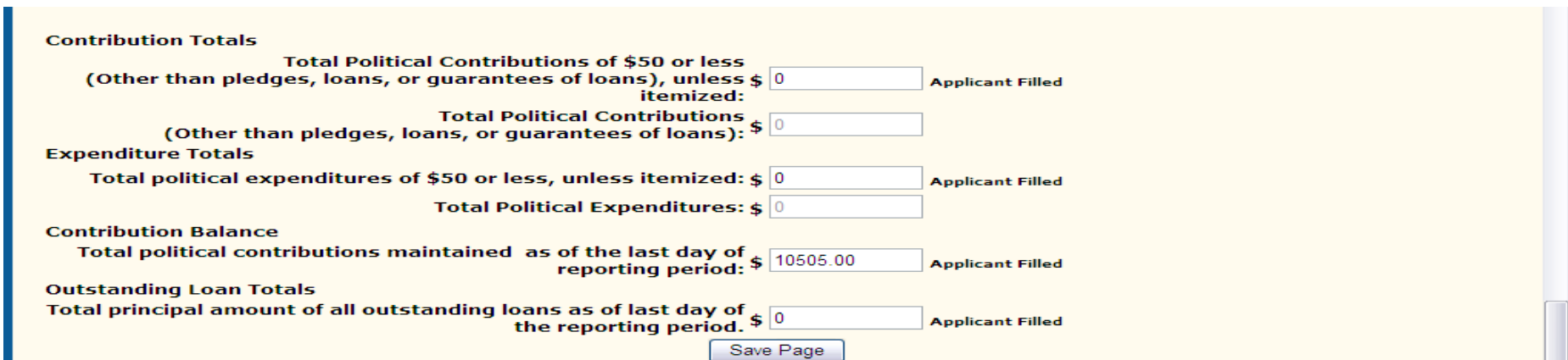
Coversheet 2

Totals



The screenshot shows the 'Candidate/Officeholder Report: Support & Totals CS2' page. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right of the logo are links for 'Log off' and 'Help'. Below the logo is a navigation bar with links: 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. Underneath this are links for 'CS1', 'CS2' (which is selected), 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below these are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. In the center of the page, the text 'Totals Added' is displayed in red. At the bottom left, there is a field for 'C/OH Name: Joe Candidate' and a text area for 'Notice From Political Committee(s)'.

1. Once data is successfully saved, “**Totals Added**” will be displayed at the top of the page while saved financial data will be displayed at the bottom of the page.



The screenshot shows the financial data entry section. It includes the following fields and labels:

- Contribution Totals**
 - Total Political Contributions of \$50 or less (Other than pledges, loans, or guarantees of loans), unless itemized: \$ Applicant Filled
 - Total Political Contributions (Other than pledges, loans, or guarantees of loans): \$
- Expenditure Totals**
 - Total political expenditures of \$50 or less, unless itemized: \$ Applicant Filled
 - Total Political Expenditures: \$
- Contribution Balance**
 - Total political contributions maintained as of the last day of reporting period: \$ Applicant Filled
- Outstanding Loan Totals**
 - Total principal amount of all outstanding loans as of last day of the reporting period: \$ Applicant Filled

At the bottom center, there is a 'Save Page' button.

Schedule A – Entering Data

The screenshot shows a web form for entering contribution data. It includes fields for Date, Out-of-State PAC, ID#, Contributor Name (with Title, First Name, MI, Last Name, Suffix, and Contributor Organization), Contributor Address (with Street No, Street Name, Apt/Suite, PO Box, City, State, and Zip Code), Amount of contribution (\$), In-Kind contribution description, Principal occupation/Job title, and Employer. There are also buttons for 'Clear Contact Info', 'Save', and 'Clear Page'. Four orange arrows indicate the sequence of steps: 1. Date field, 2. 'Select Contributor Name' hyperlink, 3. Amount of contribution (\$) field, and 4. 'Save' button.

1. Enter Date of contribution. Date must be within designated time period. If entry is not within contribution period, error message will be displayed at top of page.
2. Enter Contributor contact information OR click on “Select Contributor Name.” hyperlink.
3. Enter required information.
4. Save data by selecting “Save.”

Schedule A – Saved Data

Record Added
[Import schedule A data](#)

Filer name: Joe Candidate
Date: / /
[Select Contributor Name](#)

Out-of-State PAC: ☐ ID#:

[Clear Contact Info](#)

1. Once data is successfully saved, “**Record Added**” will be displayed at the top of the entry while the entry will be displayed at the bottom of the page.

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate, Junior	100 Victory Lane San Antonio , TX 78200	\$500.00		12/7/2010 1:05:12 PM	Edit	Delete
1							

Schedules B thru T

Follow directions denoted for Schedule A

- Schedule B – Pledged Contributions
- Schedule E – Loans
- **Schedule F – Political Expenditures**
- Schedule G – Political Expenditures Made from Personal Funds
- Schedule H – Payment from Political Contributions to a Business of C/OH
- Schedule I – Non-Political Expenditures Made from Political Contributions
- Schedule K – Credits
- Schedule T – In-kind Contribution or Political Expenditure for Travel outside of Texas.

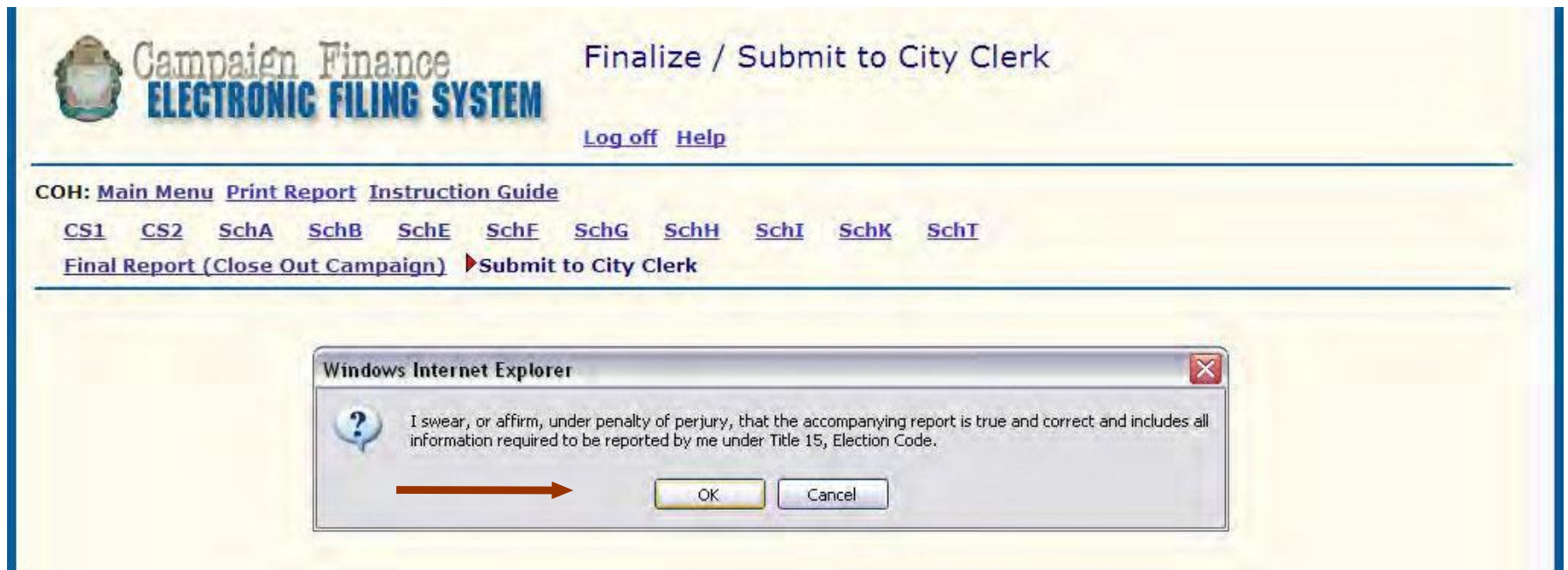
Submit to City Clerk

Submit for Posting to the Web

The screenshot displays the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top, there is a logo on the left and the text 'Finalize / Submit to City Clerk' on the right. Below the logo, there are links for 'Log off' and 'Help'. A horizontal menu bar contains several options: 'COH: Main Menu', 'Print Report', 'Instruction Guide', 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', 'SchT', 'Final Report (Close Out Campaign)', and 'Submit to City Clerk'. A red arrow points to the 'Submit to City Clerk' link. Below the menu bar, there is a message: 'If you are not ready to finalize you may return to main menu or review instruction guide.' followed by links for 'MAIN MENU' and 'INSTRUCTION GUIDE'. Another message states: 'If you are ready to submit please click continue.' with a red arrow pointing to a 'Continue' button.

1. To submit completed Report to the Office of the City Clerk for posting to the web, select “Submit to City Clerk.”
2. Print/Review Report for accuracy.
3. For verification purposes, the user will be asked if his/her intent is to submit the Report to the Office of the City Clerk.
 - a. If so, select “Continue.” User will be asked to complete Oath.
 - b. If not, select “Main Menu.” Users will be directed to Main Menu.

Completing Oath Submit Report to City Clerk



1. Complete Oath by selecting "OK."
2. Once Oath is completed, User will be directed back to Main Menu.

Report Status

Complete Packets / Locked Down

TEST

Create New Packet


☒ COH
☐ SPAC
☐ UC

☒ January 15 Semi-Annual 2011
☐ 30th Day Before General Election 2011
☐ 15 days after Campaign Treasurer Appointment
☐ Exceeded \$500 limit
☐ Final Report COH

Create Packet

Incomplete Packets

No incomplete packets found.

 Complete Packets / Locked Down

Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType
January 15 Semi-Annual 2011	COH	2/23/2011 1:41:44 PM	Pending	1012	History	7/1/2010	12/31/2010
1							

1. Upon completion of Oath, the “Lock down Status” of the Report will be denoted as “Pending.”
2. User will be notified via e-mail when report has been “Locked down.”

Report Status

Incomplete Packets

TEST

Create New Packet

☒ COH

☐ SPAC

☐ UC


☒ January 15 Semi-Annual 2011

☐ 30th Day Before General Election 2011

☐ 15 days after Campaign Treasurer Appointment

☐ Exceeded \$500 limit

☐ Final Report COH

 Incomplete Packets

No incomplete packets found.

Complete Packets / Locked Down

Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType
January 15 Semi-Annual 2011	COH	2/23/2011 1:41:44 PM	Pending	1012	History	7/1/2010	12/31/2010
1							

1. Reports started but not submitted to the Office of the City Clerk will be denoted as an “Incomplete Packet.”
2. Reports can be accessed by clicking on the Report Type to enter additional data.

Campaign Finance System Import/Upload Instructions

The Campaign Finance System includes a function for users to import contributions & expenses into the database from a specially formatted excel spreadsheet. Instructions below are intended to assist a user on performing the Import function for contributions (Sch A) and Expenses (Sch F). These instructions assume that you are already in the specific schedule report. Clarification on terminology: **Upload** is the act of uploading information in an excel template into the system for review prior to importing the information into the database. **Import** is a term used to express the act of importing information into the database.

A. Upload File – Excel Templates

The system requires that a specially formatted excel file be used for the import to work. These uniquely formatted excel files must include required column headings, sheet/tab name and some required entries. These excel templates for contributions and expenses can be found in the [Office of the City Clerk's Elections Web Site](http://www.sanantonio.gov/clerk/elections/) (<http://www.sanantonio.gov/clerk/elections/>) at the bottom of the column with heading "Campaign Finance Information".



B. Create the Upload File

First you must complete the upload file. This is an excel file with specific columns which must be completed and meet information requirements.

- 1) The sheet/tab name must be '**Sheet1**'. Do not change the sheet/tab name that is used by the template.
- 2) Information on the excel sheet/tab must meet specific requirements. These requirements can be found in the appendices as listed below:

a. **Appendix A – Schedule A – Upload File Data Requirements**

b. **Appendix F – Schedule F – Upload File Data Requirements**

C. Uploading information into the Campaign Finance System

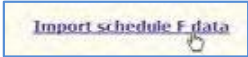




Once you have completed the upload file as described in "Create the Upload File", you are now ready to upload the information into the Campaign Finance System. These instructions assume that you are already in the Campaign Finance System and in the specific "New" or "Pending" Schedule Report screen shown below:

SCHEDULE A (Contributions)

SCHEDULE F (Expenses)

Step by Step instructions follow on the next page. Keep in mind that you can execute Steps 1-6 as many times as you want in order to check for errors on your import file (xls). Information on your import file does not populate the database until you execute Step 7.

Step by Step Instructions

1. Click on "Import schedule <x> data, where <x> is the specific schedule you are working on.	
2. Click on "Browse"	
3. Using the 'Choose File' dialog window, navigate to the directory where your upload file is located.	
4. Double-Click on the upload file you created.	
5. Click on "Upload File" button	
6. If errors are detected on the upload file, the system will display an error message as shown on the first print screen (6.a.) below. The screen shows the columns and the information as it existed in the upload file you created. There will be an additional column to the left which describes the error encountered. If no errors were found , you will get the message shown on the 2 nd print screen (6.b.) below. <ol style="list-style-type: none"> If errors are encountered, correct errors on upload file and repeat steps 1-6 If no errors are encountered, proceed to step 7. 	

6.a. - ERRORS ENCOUNTERED

Column describing any errors

Invalid data found.
Please correct your data file and upload again.

Columns of information from the excel upload file

2 record(s) with errors.

ContrDate must be between 5/5/2011 and 6/30/2011

Title	FN	MI	LN	Suffix	NickName	OtherName	AreaCode	PhonePre
Test1-First Name								
Test1-Last Name								

Print Errors

6.b. - NO ERRORS FOUND

Back to schedule

Message indicating the number of records found in excel file and ready for import.

2 record(s) valid for import.


Data is valid.
Click Import Data button to continue.

Import Data

If you get this error, the excel upload file is not formatted correctly, please use template from Elections library.

Upload File

Data file invalid.

7. Click on "Import Data"	
8. System will present message showing the number of records imported. Click "Back to schedule"	
9. Notice that the information uploaded into the system is listed at the bottom of the report as shown in the print screen below. You have successfully imported your information. You may proceed with updating/completing other schedules, print & review your information and/or submit report to the Office of the City Clerk.	

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-15-2011	Test1- Last Name, Test1- First Name	111 One Street San Antonio, TX 78111	\$111.00		5/2/2011 4:21:58 PM	Edit	Delete
05-15-2011	Test2- Last Name, Test2- First Name	PO Box 222 San Antonio, TX 78222	\$222.00		5/2/2011 4:21:58 PM	Edit	Delete
1							

Before Upload

After Upload

Campaign Finance
ELECTRONIC FILING SYSTEM

Political Contributions Other Than Pledges or Loans
- Schedule A

Log off Help

COH: Main Menu Print Report Instruction Guide
CS1 CS2 PSchA SchB SchE SchF SchG SchH SchI SchK SchT
Final Report (Close Out Campaign) Submit to City Clerk

Import schedule A data

Filer name: Ms Diane Adobe
Date: / / Out-of-State PAC: ☐ ID#:

Select Contributor Name
Clear Contact Info

Contributor Name
Title: First Name: MI:
Last Name: Suffix:
Contributor Organization:

Contributor Address
Street No: Street Name: Apt/Suite:
or
PO Box:
City: State: Zip Code:

Amount of contribution (\$):

In-Kind contribution description:
(if applicable)

Principal occupation/Job title:
Employer:

Save Clear Page

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-15-2011	Test1- Last Name, Test1- First Name	111 One Street San Antonio, TX 78111	\$111.00		5/2/2011 4:21:58 PM	Edit	Delete
05-15-2011	Test2- Last Name, Test2- First Name	PO Box 222 San Antonio, TX 78222	\$222.00		5/2/2011 4:21:58 PM	Edit	Delete

Campaign Finance
ELECTRONIC FILING SYSTEM

Political Contributions Other Than Pledges or Loans
- Schedule A

Log off Help

COH: Main Menu Print Report Instruction Guide
CS1 CS2 PSchA SchB SchE SchF SchG SchH SchI SchK SchT
Final Report (Close Out Campaign) Submit to City Clerk

Import schedule A data

Filer name: Ms Diane Adobe
Date: / / Out-of-State PAC: ☐ ID#:

Select Contributor Name
Clear Contact Info

Contributor Name
Title: First Name: MI:
Last Name: Suffix:
Contributor Organization:

Contributor Address
Street No: Street Name: Apt/Suite:
or
PO Box:
City: State: Zip Code:

Amount of contribution (\$):

In-Kind contribution description:
(if applicable)

Principal occupation/Job title:
Employer:

Save Clear Page

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-15-2011	Test1- Last Name, Test1- First Name	111 One Street San Antonio, TX 78111	\$111.00		5/2/2011 4:21:58 PM	Edit	Delete
05-15-2011	Test2- Last Name, Test2- First Name	PO Box 222 San Antonio, TX 78222	\$222.00		5/2/2011 4:21:58 PM	Edit	Delete

Appendix A – Schedule A Upload File Data Requirements

Excel Columns and Information Requirements

Column	Column Heading	Field Description	Data Type & Field Length Allowed	Required (Y OR N)	Example
A	Title	Title	Character 3	N	Mr/Mrs/Ms
B	Fname	First Name	Character 50	Y- only required if Contributor Organization is left blank	
C	MI	Middle Initial	Character 1	N	
D	Lname	Last Name	Character 50	Y- only required if Contributor Organization is left blank	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	Other Name	Contributer Organization	Characater 100	Y- only required if First Name and Last Name are left blank	Business Name
H	AreaCode	Phone Area Code	Character 3	N	210
I	PhonePre	Phone Prefix	Character 3	N	999
J	PhoneNbr	Phone Suffix	Character 4	N	9999
K	PhoneExt	Phone Extension	Character 8	N	
L	HouseNbr	Street No.	Character 50	Y- only required if no PO Box	
M	StreetName	Street Name	Character 50	Y- only required if no PO Box	No commas allowed, no 'PO BOX' allowed.
N	POBox	Post Office Box	Character 15	Y - only required if Street No. and Street Name are left blank.	"123" (do no prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	City	City	Character 50	Y	
Q	fkStateAbbr	State	Character 2	Y	TX
R	ZipCode	Zip Code	Character 5	Y	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	ContrDate	Contribution Date	DATE	Y	MM/DD/YYYY (*)
U	OutOfStatePACYN	Out of State PAC	Character	N	Y OR N
V	OutOfStatePACID	Out of State PaAC Id#	Character 25	N	
W	TransAmt	Amount of Contribution	NUMBER	Y	9999999.99
X	InKindDescr	In-Kind Description	Character 250	N	
Y	JobTitle	Occupation/Job Title	Character 75	N	
Z	Employer	Employer	Character 150	N	

(*) – The Contribution date must fall within the date period specified by the “City of San Antonio Contribution Cycles”. You can reference these report cycles at the [Office of the City Clerk’s Elections WEB site](http://www.sanantonio.gov/clerk/elections/) (<http://www.sanantonio.gov/clerk/elections/>). If you have an incomplete report already created, you can also see the date period under the list of Incomplete Packets, as shown below.

Incomplete Packets									
									Enable Deletes
Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType	Delete Report	
July 15: Semi-Annual 2011	COH	4/26/2011 7:43:04 AM	Open	1093	History	5/5/2011	6/30/2011	Delete	

Appendix F – Schedule F – Upload File Data Requirements

Excel Columns and Information Requirements

Column	Column Heading	Field Description	Data Type	Required (Yes / No)	Example
A	Title	Title	Character 3	N	Mr/Mrs/Ms
B	Fname	First Name	Character 50	Y- only required if Contributor Organization is left blank	
C	MI	Middle Initial	Character 1	N	
D	Lname	Last Name	Character 50	Y- only required if Contributor Organization is left blank	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	Other Name	Contributor Organization	Character 100	Y- only required if First Name and Last Name are left blank	Business Name
H	AreaCode	Phone Area Code	Character 3	N	210
I	PhonePre	Phone Prefix	Character 3	N	999
J	PhoneNbr	Phone Suffix	Character 4	N	9999
K	PhoneExt	Phone Extension	Character 8	N	
L	HouseNbr	Street No.	Character 50	Y- only required if no PO Box	
M	StreetName	Street Name	Character 50	Y- only required if no PO Box	No commas allowed, no 'PO BOX' allowed.
N	POBox	Post Office Box	Character 15	Y - only required if Street No. and Street Name are left blank.	"123" (do no prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	City	City	Character 50	Y	
Q	fkStateAbbr	State	Character 2	Y	TX
R	ZipCode	Zip Code	Character 5	Y	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	TransDate	Payment Date	DATE	Y	MM/DD/YYYY (*)
U	TransAmt	Amount of Payment	NUMBER	Y	9999999.99
V	PurposeOfExpDescription	Purpose of Payment	Character 150	Y	
W	COHName	Candidate/Office Holder Name	Character 100	Y	
X	OffSought	Office Sought	Character 50	N	Must be one of the following: • Mayor • Council District <#>, Where <#> is 1-10 • Not Applicable
Y	OffHeld	Office Held	Character 50	N	
	PurposeOfExpCategory				

(*) – see note in Appendix A



CITY OF SAN ANTONIO ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM CARRY OVER PROCEDURES

GENERAL INFORMATION

The Carry Over feature of the System is utilized under the following circumstances:

Not involved in Run-off Election (1 instance)

- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before General Election Report to be transferred into the July 15 Semi-Annual 2011.

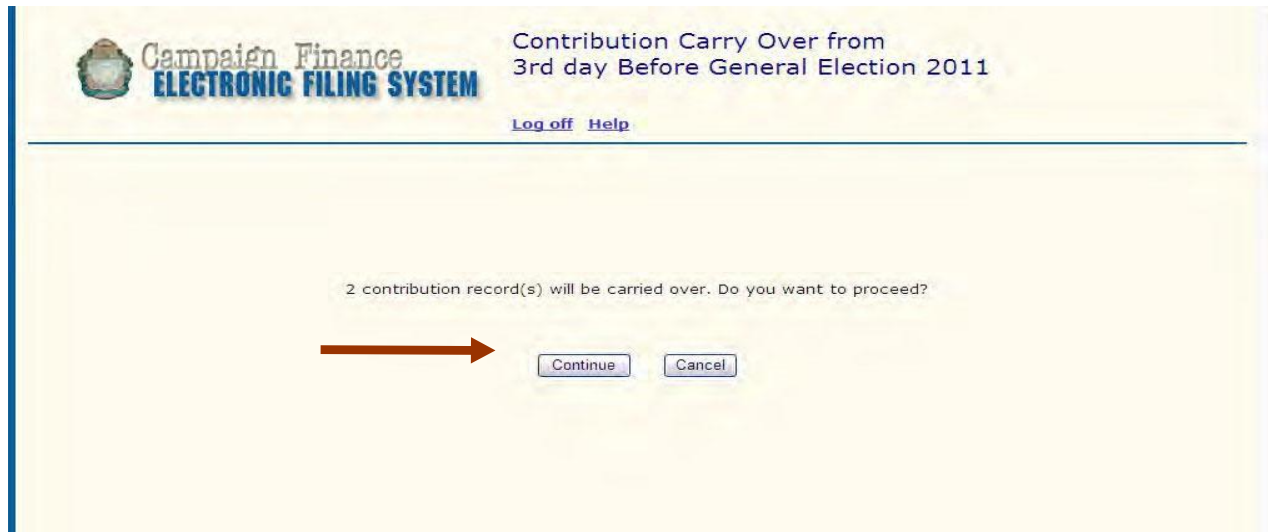
Involved in Run-off Election (2 instances)

- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before General Election Report to be transferred into the 8-day Before Run-off Election Report
- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before the Run-off Election Report into the July 15 Semi-Annual Report 2011

INSTRUCTIONS

1. User/Filer will create the required packet and complete Coversheet 1 and 2. On Schedule A of the newly created report, User/Filer will see a hyperlink entitled "Carry Over Contributions from ..."
2. Select the hyperlink.

The screenshot displays the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top, it says 'Political Contributions Other Than Pledges or Loans - Schedule A'. Below this, there are links for 'Log off' and 'Help'. A navigation bar includes links for 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. A menu of schedules is shown: 'CS1', 'CS2', 'SchA' (highlighted with a red triangle), 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below the menu are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red arrow points to the link 'Carry Over Contributions from 3rd day Before General Election 2011'. Other visible links include 'Import schedule A data'. The form includes fields for 'Filer name: Joe Candidate', 'Date: / /', 'Out-of-State PAC: ID#:', 'Select Contributor Name', 'Clear Contact Info', 'Contributor Name', 'Title: [dropdown]', 'First Name: [text]', and 'MI: [text]'.



1. User/Filer will be directed to a new page displaying the number of contributions to be carried over to the current report.
2. Select "Continue" to proceed with the process.
3. Once "Continue" has been selected, ALL contributions listed on Schedule A from the denoted report will automatically be transferred into the current report and will be displayed at the bottom of the page. There is no need to save.

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-05-2011	Candidate, Grandma	1000 River Bend San Antonio, TX 78200	\$500.00		4/27/2011 10:39:04 AM	Edit	Delete
05-06-2011	Candidate, Grandpa	1000 River Bend San Antonio, TX 78200	\$500.00		4/27/2011 10:39:04 AM	Edit	Delete
1							


1. Print and review for accuracy.
2. From this point forward you may proceed with entering data for the reporting period.



CITY OF SAN ANTONIO ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM USER'S GUIDE

CREATING CORRECTION AFFIDAVIT

Correction Affidavit Mode




Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType	Lockdown	Delete Report
January 15 Semi-Annual 2011	COH	4/7/2011 3:45:32 PM	Locked	1027	History	7/1/2010	12/31/2010	Lockdown	Delete

1

Enable Deletes

1. Select the locked report that requires correcting.

COH: Main Menu Instruction Guide Correction Affidavit	
CS1 CS2 SchA SchB SchE SchF SchG SchH SchI SchK SchT	
Final Report	

1. Select “Correction Affidavit” from the Main Menu.

Correction Affidavit Mode

The screenshot shows the 'Correction Affidavit Mode' interface of the Campaign Finance Electronic Filing System. At the top left is the system logo. The title 'Correction Affidavit for Candidate/Officeholder' is displayed on the right. Below the title are links for 'Log off' and 'Help'. A navigation bar includes 'COH Correction Affidavit: Main Menu' and 'Instruction Guide'. A red arrow points to the 'Correction Affidavit' link. The main form area contains several input fields: 'Title' (a dropdown menu), 'First Name' (containing 'Joe'), 'Mi' (a dropdown menu), 'Nickname' (empty), 'Last Name' (containing 'Candidate'), and 'Suffix' (empty). Below these are 'Original Report Type' (containing 'January 15 Semi-Annual 2011') and 'Original Period Covered' (7 / 1 / 2010 through 12 / 31 / 2010). A large text area for 'Explanation of Correction:' is at the bottom, with an orange arrow pointing to it.

Campaign Finance
ELECTRONIC FILING SYSTEM

Correction Affidavit for Candidate/Officeholder

[Log off](#) [Help](#)

COH Correction Affidavit: [Main Menu](#) [Instruction Guide](#)

► Correction Affidavit

Title: First Name: Joe Mi:

Nickname: Last Name: Candidate Suffix:

Original Report Type:

Original Period Covered: / / through / /

Explanation of Correction:

1. Enter Explanation of ALL Corrections.
2. Check box containing Oath.
3. Click "Save Corrections."

Correction Affidavit Mode

The screenshot shows a web browser window with a blue header bar. The header contains a navigation menu with links: Correction Affidavit, CS1, CS2, SchA, SchB, SchE, SchF, SchG, SchH, SchI, SchK, and SchT. Below the header, there is a sub-header "Final Report (Close Out Campaign)". The main content area has a yellow background and displays a red message "Correction Affidavit Added" at the top. Below this message, there are several form fields: "Title:" with a dropdown menu, "First Name:" with a text box containing "Joe", "Mi:" with a text box, "Nickname:" with a text box, "Last Name:" with a text box containing "Candidate", and "Suffix:" with a text box. Below these fields, there is a field for "Original Report Type:" with a text box containing "January 15 Semi-Annual 2011". Below that, there is a field for "Original Period Covered:" with two date pickers: "7 / 1 / 2010" and "12 / 31 / 2010", separated by the word "through". Below the date pickers, there is a large text area for "Explanation of Correction:" containing the text "Correcting contribution amount." Below the text area, there is a statement: "I swear, or affirm, under penalty of perjury, that this corrected report is true and correct." Below this statement, there is a label "Check ONLY if applicable:" followed by a checkbox that is checked, with the text "I swear, or affirm, that I am filing this corrected report not later than the 14th business day after the date I learned that the report as originally filed is inaccurate."

Correction Affidavit CS1 CS2 SchA SchB SchE SchF SchG SchH SchI SchK SchT

Final Report (Close Out Campaign)

Correction Affidavit Added

Title: [v] First Name: Joe Mi: []

Nickname: [] Last Name: Candidate Suffix: []

Original Report Type: January 15 Semi-Annual 2011

Original Period Covered: 7 / 1 / 2010 through 12 / 31 / 2010

Explanation of Correction:

Correcting contribution amount.

I swear, or affirm, under penalty of perjury, that this corrected report is true and correct.

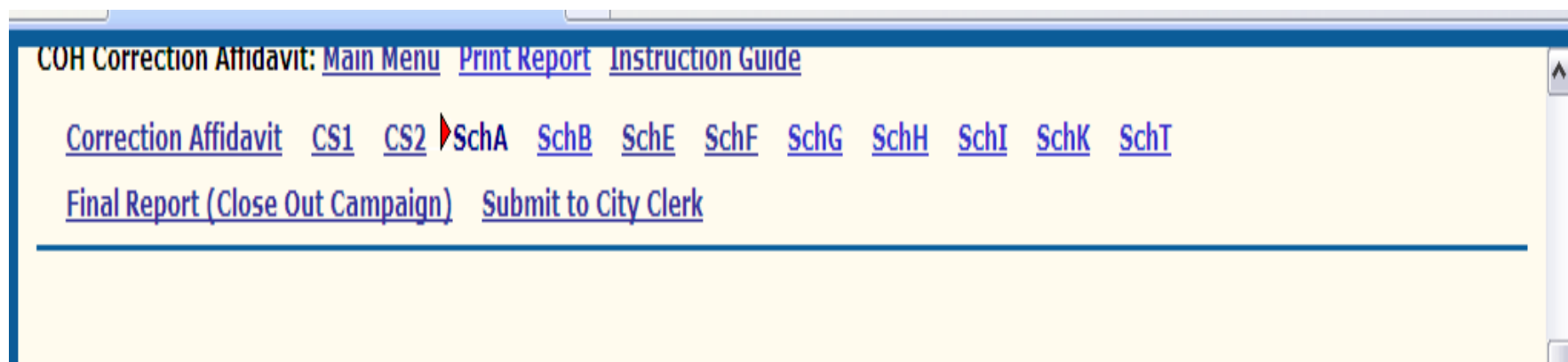
Check ONLY if applicable:

☒ I swear, or affirm, that I am filing this corrected report not later than the 14th business day after the date I learned that the report as originally filed is inaccurate.

1. Once data is successfully saved, “**Correction Affidavit Added**” will be displayed at the top of the entry.
2. Main Menu and Schedules will be displayed at the top of the page.

Correction Affidavit Mode

Adding Data



1. To add data, select the appropriate Schedule.
2. Follow the same process for entering data.

Correction Affidavit Mode

Editing Amounts, Description, Job Title, and Employer

Contributor Name

Title: First Name: MI:

Last Name: Suffix:

Contributor Organization:

Contributor Address

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

Amount of contribution (\$):

In-Kind contribution description:
(if applicable)

Principal occupation/Job title:

Employer:

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate, Joleen	100 Victory Lane San Antonio, TX 78205-	\$500.00		4/25/2011 12:57:46 PM	Edit	Delete

1

1. To edit contribution amounts, description of contribution, job title, and employer; select the appropriate Schedule containing the entry that requires correcting.
2. From the entries listed at the bottom of the page, select the entry that requires correcting.
3. Select "Edit."
4. Edit data within the entry.
5. Click "Save."

Correction Affidavit Mode

Editing Amounts, Description, Job Title and Employer

The screenshot displays the 'COH Correction Affidavit' web interface. At the top, there are links for 'Log off' and 'Help'. Below this is a navigation bar with links for 'Main Menu', 'Print Report', and 'Instruction Guide'. The main menu includes 'Correction Affidavit', 'CS1', 'CS2', 'SchA' (which is highlighted with a red triangle), 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. There are also links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. In the center of the page, a red message 'Record Updated' is displayed, with a link 'Import schedule A data' below it. On the left side, the 'Filer name' is 'Joe Candidate', and the 'Date' is shown as three empty boxes separated by slashes. Below the date is a link 'Select Contributor Name'. On the right side, there is a checkbox for 'Out-of-State PAC' followed by 'ID#' and an empty input box. At the bottom center, there is a button labeled 'Clear Contact Info'.

1. Once data is successfully saved, “**Record Updated**” will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a Report and completing Oath.

Correction Affidavit Mode

Editing Contact Information

The screenshot shows a web form titled "Correction Affidavit Mode" with a sub-section "Editing Contact Information". The form is divided into several sections:

- Contributor Name:** Includes fields for Title (dropdown), First Name, MI, Last Name, and Suffix.
- Contributor Organization:** A single text field.
- Contributor Address:** Includes fields for Street No., Street Name, Apt/Suite, PO Box, City, State (dropdown), and Zip Code.
- Amount of contribution (\$):** A text field.
- In-Kind contribution description: (if applicable):** A large text area.
- Principal occupation/Job title:** A text field.
- Employer:** A text field.

Below the form fields are two buttons: "Save" and "Clear Page".

At the bottom of the form is a table with the following data:

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate , Joleen	100 Victory Lane San Antonio , TX 78205-	\$500.00		4/25/2011 12:57:46 PM	Edit	Delete

Below the table is a page number "1".

- 1.To edit Contact information, select the appropriate Schedule containing the entry that requires correcting.
- 2.From the entries listed at the bottom of the page, select the entry that requires correcting.
- 3.Select "Edit."


Correction Affidavit

Editing Contact Information

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)
[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

[Import schedule A data](#)

Filer name: Joe Candidate
Date: 7 / 2 / 2010
[Select Contributor Name](#)
Out-of-State PAC: ☐ ID#:



Contributor Name
Title: First Name: Joleen MI:
Last Name: Candidate Suffix:
Contributor Organization:

Contributor Address
Street No: 100 Street Name: Victory Lane Apt/Suite:
or
PO Box:
City: San Antonio State: TX Zip Code: 78205

1. Select “Change Contact Info.”

*Note: Must disable pop-up blocker.

Correction Affidavit Mode

Editing Contact Information

The screenshot shows a web form for editing contact information. The form is titled "Correction Affidavit Mode" and "Editing Contact Information". It contains several input fields and buttons. The fields are: Title (dropdown menu), First Name (text box with "Joleen"), MI (text box), Last Name (text box with "Candidate"), Suffix (text box), Contributor Organization (text box), Contributor Address (text box), Street No (text box with "100"), Street Name (text box with "Victory Lane"), Apt/Suite (text box), PO Box (text box), City (text box with "San Antonio"), State (dropdown menu with "TX"), and Zip Code (text box with "78205"). There are "Update" and "Close" buttons at the bottom. A red arrow points to the "Update" button.

Title: First Name: MI:

Last Name: Suffix:

Contributor Organization

Contributor Address

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

1. Make corrections to contact information within the pop-up window.
2. Select "Update."
3. From Main Menu, select "Save."

Correction Affidavit Mode

Editing Contact Information

COH Correction Affidavit: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

Record Updated
[Import schedule A data](#)

Filer name: Joe Candidate

Date: / /

[Select Contributor Name](#)

Out-of-State PAC: ☐ ID#:

Contributor Name

Title: First Name: MI:

1. Once data is successfully saved, “**Record Updated**” will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a report and completing Oath.



**CITY OF SAN ANTONIO
ELECTRONIC
CAMPAIGN FINANCE FILING
SYSTEM
USER'S GUIDE

CLOSING OUT**

Final Report

Closing Out Campaign



The screenshot shows the 'Candidate/Officeholder Report: Designation of Final Report' page. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right, the page title is 'Candidate/Officeholder Report: Designation of Final Report'. Below the title are links for 'Log off' and 'Help'. A horizontal menu bar contains links for 'COH Correction Affidavit', 'Main Menu', 'Print Report', and 'Instruction Guide'. Below this, a second menu bar lists various report types: 'Correction Affidavit', 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. The 'Final Report (Close Out Campaign)' link is highlighted with a red arrow, and a 'Submit to City Clerk' link is next to it. Below the menu bar, a red instruction states: '** Complete only if "Report Type" on page 1 is marked "Final Report" **'. Another red instruction says: 'If a selection mistake has been made, please click the 'Clear Form' button to reset the page.' Below this is a 'Clear Form' button. The form fields are: '1. C/OH NAME: Joe Candidate' followed by a text input field, and '3. SIGNATURE' followed by two radio buttons labeled 'Agree' and 'Disagree'. Below the radio buttons is a paragraph of legal text: 'I do not expect any further political contributions or political expenditures in connection with my candidacy. I understand that designating a report as a final report terminates my campaign treasurer appointment. I also understand that I may not accept any campaign contributions or make any campaign expenditures without a campaign treasurer appointment on file.'

Campaign Finance
ELECTRONIC FILING SYSTEM

Candidate/Officeholder Report:
Designation of Final Report

[Log off](#) [Help](#)

COH Correction Affidavit: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

► [Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

**** Complete only if "Report Type" on page 1 is marked "Final Report" ****

If a selection mistake has been made, please click the 'Clear Form' button to reset the page.

1. C/OH NAME: Joe Candidate

3. SIGNATURE

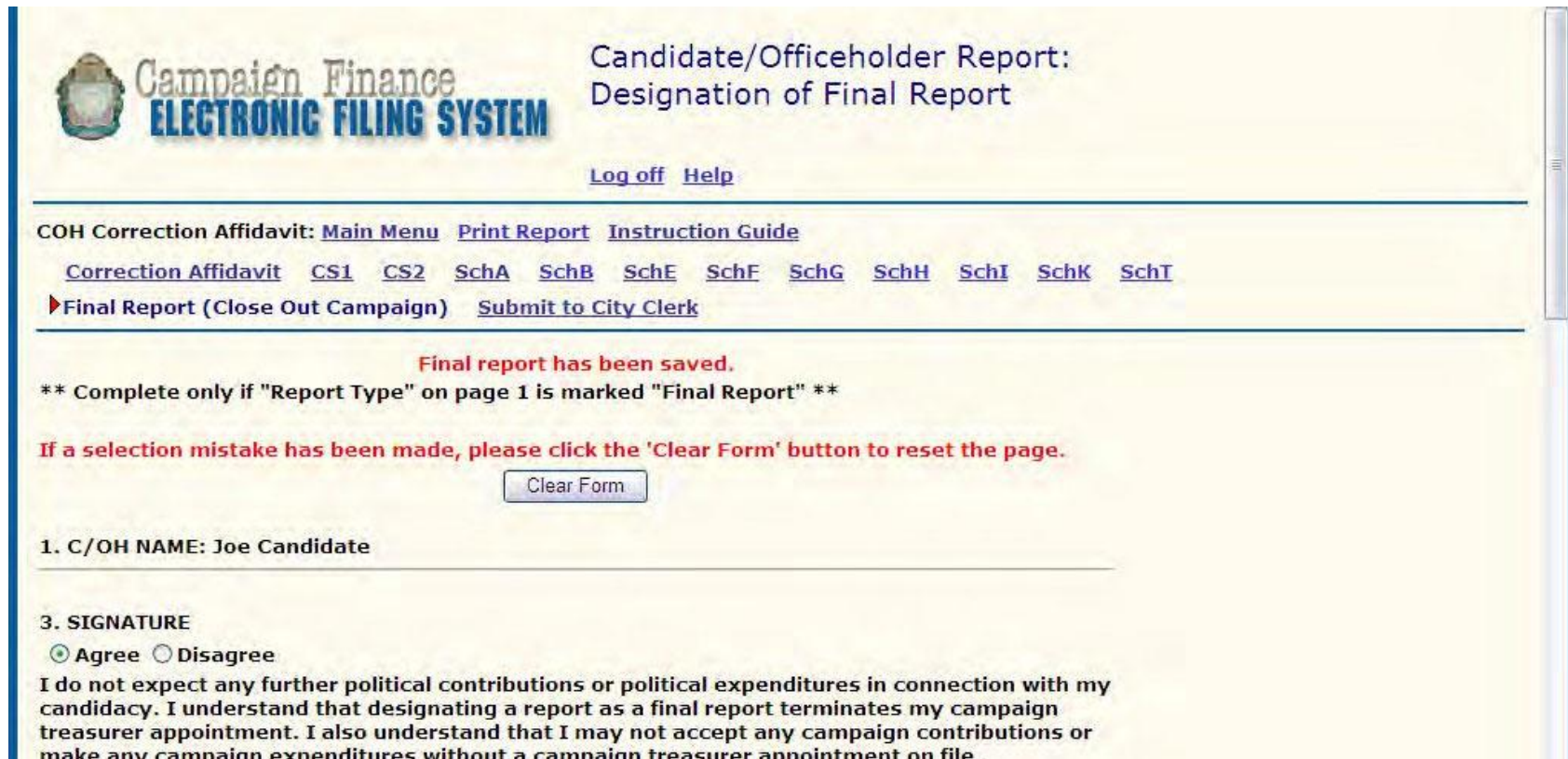
☐ Agree ☐ Disagree

I do not expect any further political contributions or political expenditures in connection with my candidacy. I understand that designating a report as a final report terminates my campaign treasurer appointment. I also understand that I may not accept any campaign contributions or make any campaign expenditures without a campaign treasurer appointment on file.

1. Select "Final Report (Close Out Campaign)."
2. Click on the appropriate radio buttons for Questions 3, 4, and 5.
3. Select "Save."

Final Report

Closing Out Campaign



The screenshot shows the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo on the left and the title 'Candidate/Officeholder Report: Designation of Final Report' on the right. Below the logo is a 'Log off Help' link. A navigation bar contains links for 'COH Correction Affidavit', 'Main Menu', 'Print Report', 'Instruction Guide', and a list of schedules from 'CS1' to 'SchT'. The 'Final Report (Close Out Campaign)' link is highlighted. Below the navigation bar, a red message states 'Final report has been saved.' followed by instructions to complete the report type and a 'Clear Form' button. The form fields show '1. C/OH NAME: Joe Candidate' and '3. SIGNATURE' with 'Agree' selected. A disclaimer text is at the bottom of the form area.

Campaign Finance
ELECTRONIC FILING SYSTEM

Candidate/Officeholder Report:
Designation of Final Report

[Log off](#) [Help](#)

COH Correction Affidavit: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

► **Final Report (Close Out Campaign)** [Submit to City Clerk](#)

Final report has been saved.

**** Complete only if "Report Type" on page 1 is marked "Final Report" ****

If a selection mistake has been made, please click the 'Clear Form' button to reset the page.

1. C/OH NAME: Joe Candidate

3. SIGNATURE

☒ Agree ☐ Disagree

I do not expect any further political contributions or political expenditures in connection with my candidacy. I understand that designating a report as a final report terminates my campaign treasurer appointment. I also understand that I may not accept any campaign contributions or make any campaign expenditures without a campaign treasurer appointment on file.

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



CITY OF SAN ANTONIO ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM USER'S GUIDE

MANAGING ADDRESS BOOK

Address Book

Selecting Contact Information




The screenshot shows the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top, it says 'Candidate/OfficeHolder Campaign Finance Report CS1'. Below this are links for 'Log off' and 'Help'. A navigation bar contains 'COH: [Main Menu](#) [Print Report](#) [Instruction Guide](#)'. Below the navigation bar, there is a section for 'CS1'. An orange arrow points to the 'Select Candidate/Officeholder' link. The form includes a 'Change Of Address' checkbox and a 'Clear Contact Info' button. The 'Candidate/Officeholder Name' section has fields for Title (a dropdown), First Name, MI, Nickname, Last Name, and Suffix. The 'Candidate/Officeholder Mailing Address' section has fields for Street No., Street Name, Apt/Suite, and a PO Box field, with an 'or' option between the street and PO box fields.

1. To select an entry from the Address Book, click on “Select Candidate/Officeholder” or appropriately titled hyperlink (Treasurer Name for CS2; Contributor Name for Schedule A; Payee Name for Schedule F; etc.).

Address Book

Selecting Contact Information



The screenshot shows a web interface for an address book. At the top, there is a button labeled "Download List To Excel". Below this, there are two links: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts". The main part of the interface is a table with the following columns: "select", "Name", "Address", "Mailing Address", and "Hide". There are two rows of contact information. The first row shows "Joe Candidate" at "100 Victory Lane, San Antonio, TX 78205". The second row shows "Joleen Candidate" at "100 Victory Lane , San Antonio , TX 78205-". Each row has a "select" link in the first column and a checkbox in the "Hide" column. A red arrow points to the "select" link in the first row.

select	Name	Address	Mailing Address	Hide
select	Joe Candidate	100 Victory Lane, San Antonio, TX 78205		<input type="checkbox"/>
select	Joleen Candidate	100 Victory Lane , San Antonio , TX 78205-		<input type="checkbox"/>

At the bottom of the table, there are again two links: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts".

1. Address Book entries will appear in a pop-up window.
2. Click on "Select" for the appropriate entry.
3. Entry will auto-populate with contact information selected. Note that only contact information is transferred.

Address Book

Editing Contact Information

Contributor Name

Title: First Name: MI:

Last Name: Suffix:

Contributor Organization:

Contributor Address

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

Amount of contribution (\$):

In-Kind contribution description:
(if applicable)

Principal occupation/Job title:

Employer:

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate , Joleen	100 Victory Lane San Antonio , TX 78205-	\$500.00		4/25/2011 12:57:46 PM	Edit	Delete
1							

- 1.To edit Contact information, select the appropriate Schedule containing the entry that requires correcting. Entries can not be edited within the Address Book.
- 2.From the entries listed at the bottom of the page, select the entry that requires correcting.
- 3.Select “Edit.

Address Book

Editing Contact Information

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)
[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

[Import schedule A data](#)

Filer name: Joe Candidate
Date: / / Out-of-State PAC: ☐ ID#:

[Select Contributor Name](#)

→

Contributor Name

Title: First Name: MI:
Last Name: Suffix:

Contributor Organization:

Contributor Address

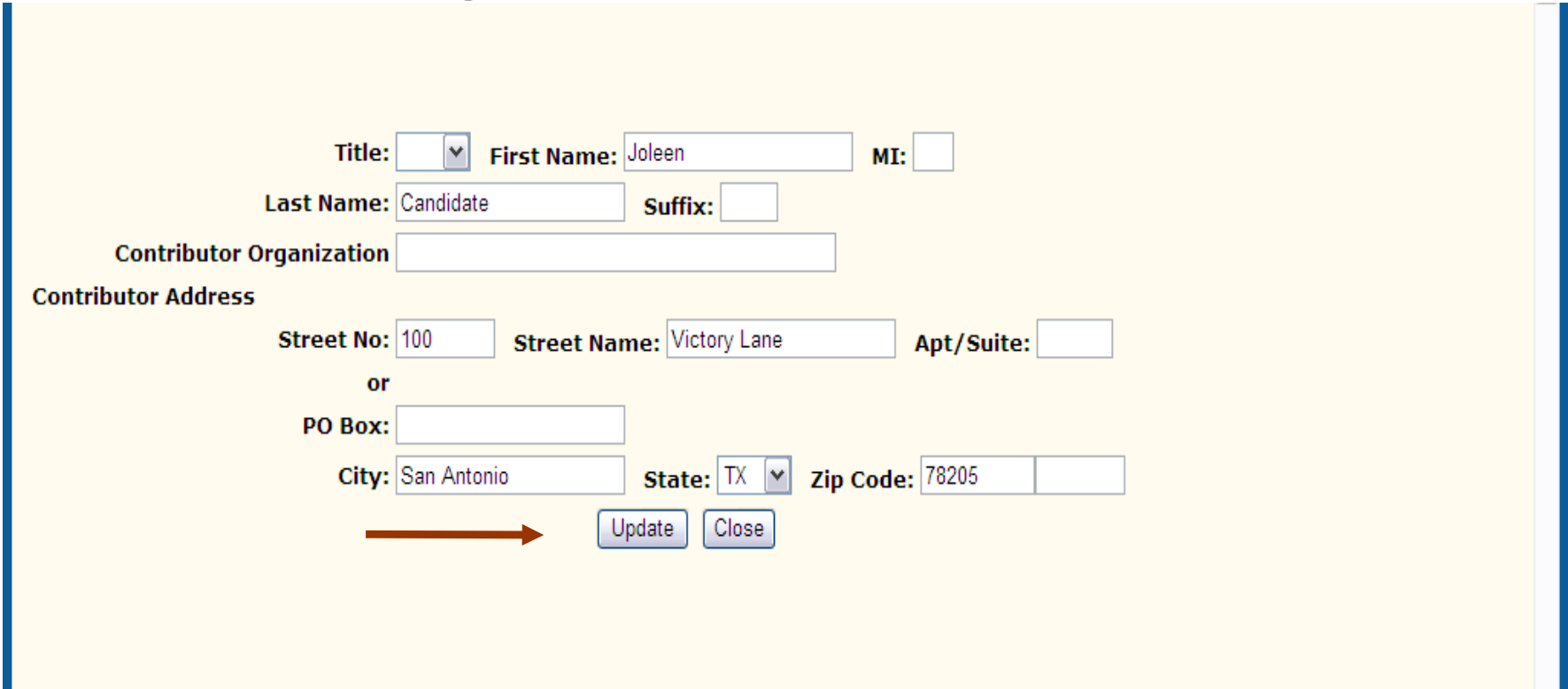
Street No: Street Name: Apt/Suite:
or
PO Box:
City: State: Zip Code:

1. Select "Change Contact Info."

*Note: Must disable pop-up blocker.

Address Book

Editing Contact Information



The screenshot shows a web form for editing contact information. The form is set against a light yellow background and is framed by a blue border. It contains several input fields and dropdown menus. The fields are organized into sections: personal information (Title, First Name, MI, Last Name, Suffix), organization (Contributor Organization), address (Contributor Address), and location (Street No, Street Name, Apt/Suite, PO Box, City, State, Zip Code). At the bottom, there are 'Update' and 'Close' buttons, with a brown arrow pointing towards them.

Title: First Name: MI:

Last Name: Suffix:

Contributor Organization

Contributor Address

Street No: Street Name: Apt/Suite:

or

PO Box:

City: State: Zip Code:

Update Close

1. Make corrections to contact information within the pop-up window.
2. Select "Update."
3. From Main Menu, select "Save."

Address Book

Editing Contact Information

COH Correction Affidavit: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[Correction Affidavit](#) [CS1](#) [CS2](#) ▶ [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

Record Updated
[Import schedule A data](#)

Filer name: Joe Candidate

Date: / /

[Select Contributor Name](#)

Out-of-State PAC: ☐ ID#:

Contributor Name

Title: First Name: MI:

1. Once data is successfully saved, “**Record Updated**” will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.

Address Book

Editing Contact Information

COH Correction Affidavit: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

[Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)

[Final Report \(Close Out Campaign\)](#) [Submit to City Clerk](#)

Record Updated
[Import schedule A data](#)

Filer name: Joe Candidate

Date: / /

[Select Contributor Name](#)

Out-of-State PAC: ☐ ID#:

Contributor Name

Title: First Name: MI:

1. Once data is successfully saved, “**Record Updated**” will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a report and completing Oath.

Address Book

Downloading Contacts to Excel

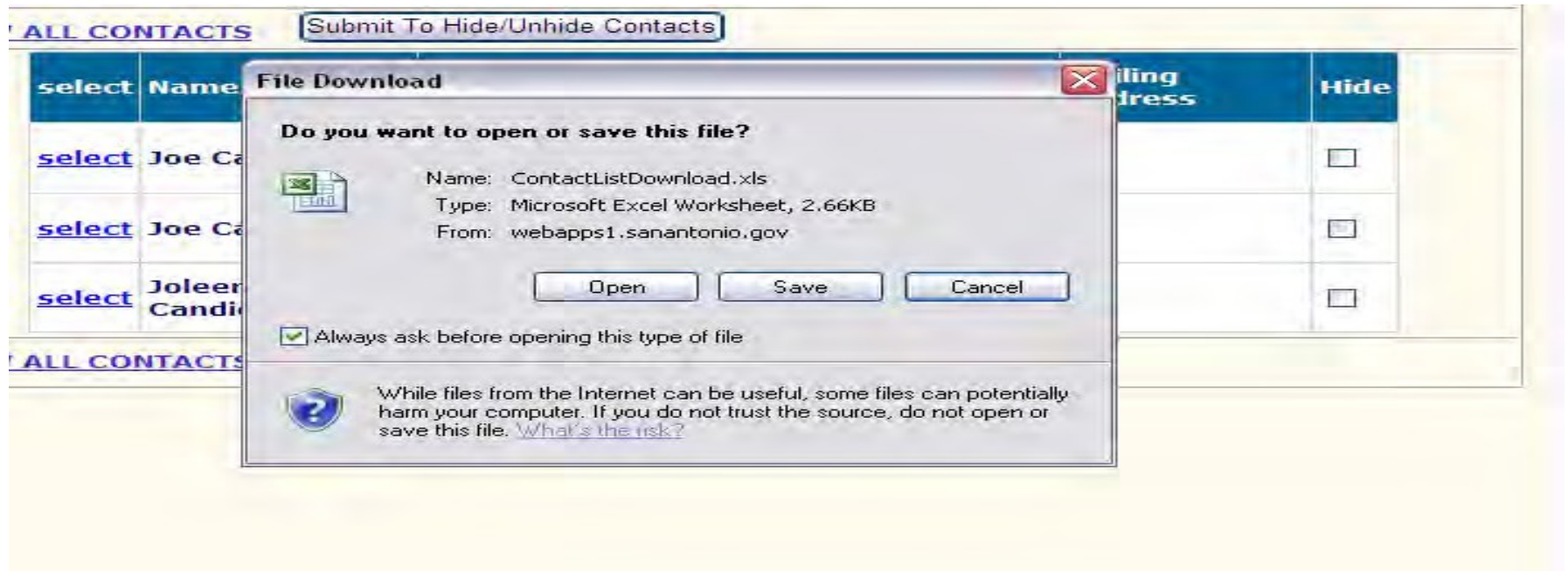
The screenshot shows a web-based address book interface. At the top, there is a button labeled "Download List To Excel". Below this, there are two buttons: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts". The main part of the interface is a table with the following columns: "select", "Name", "Address", "Mailing Address", and "Hide". There are two rows of contact data. The first row shows "Joe Candidate" with the address "100 Victory Lane, San Antonio, TX 78205". The second row shows "Joleen Candidate" with the address "100 Victory Lane , San Antonio , TX 78205-". Each row has a "select" link in the first column and a "Hide" checkbox in the last column. At the bottom of the table, there are again two buttons: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts".

select	Name	Address	Mailing Address	Hide
select	Joe Candidate	100 Victory Lane, San Antonio, TX 78205		<input type="checkbox"/>
select	Joleen Candidate	100 Victory Lane , San Antonio , TX 78205-		<input type="checkbox"/>

1. To transfer data maintained within Address Book to an excel document, select "Download List to Excel".

Address Book

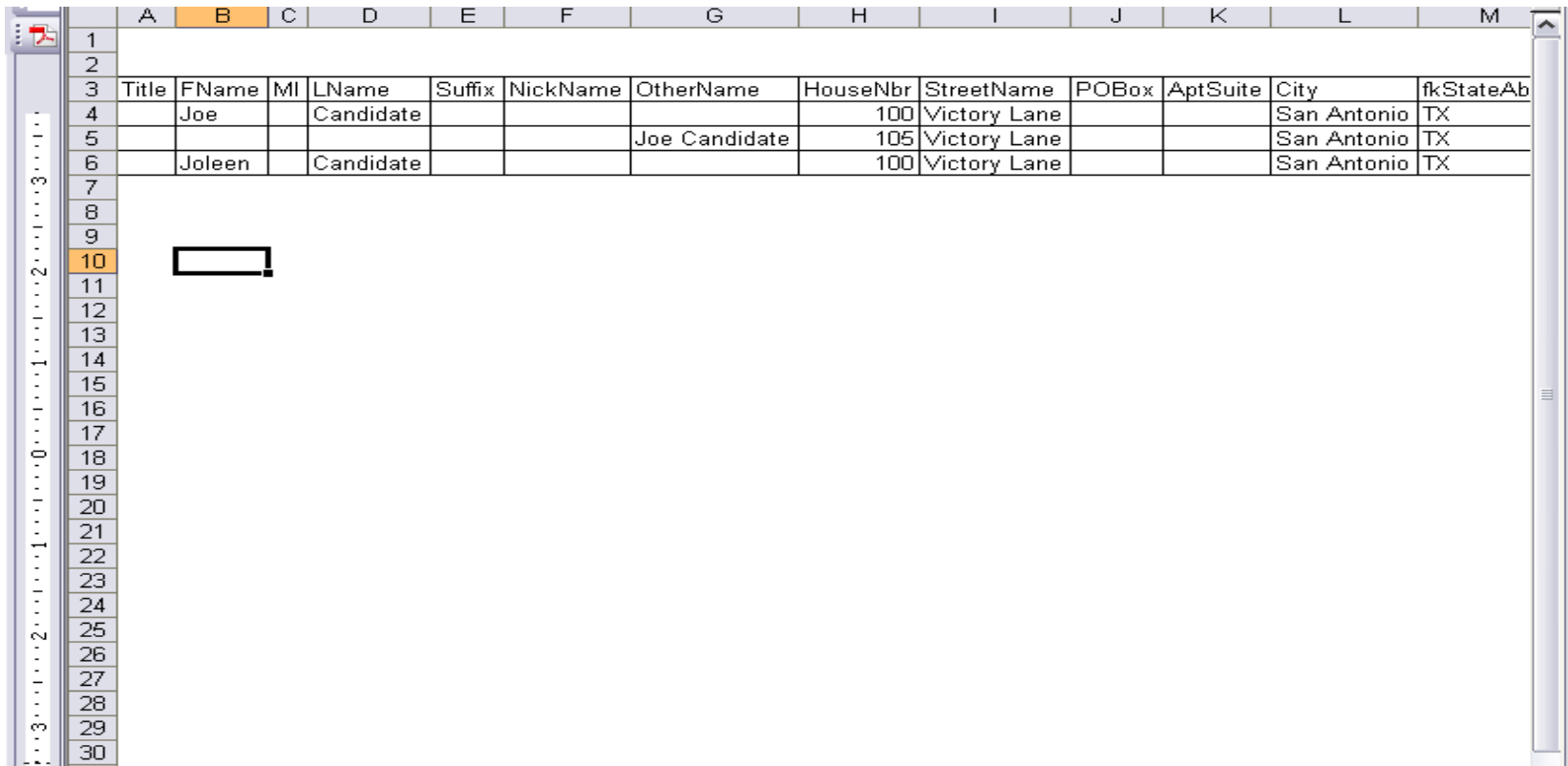
Downloading Contacts to Excel



1. To transfer data maintained within Address Book to an excel document, select "Download List to Excel".
2. User/Filer will be asked "Do you want to open or save this file." Select the appropriate option.

Address Book

Downloading Contacts to Excel



	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	Title	FName	MI	LName	Suffix	NickName	OtherName	HouseNbr	StreetName	POBox	AptSuite	City	fkStateAb
4		Joe		Candidate				100	Victory Lane			San Antonio	TX
5							Joe Candidate	105	Victory Lane			San Antonio	TX
6		Joleen		Candidate				100	Victory Lane			San Antonio	TX
7													
8													
9													
10													
11													
12													
13													
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1. Address Book entries will be successfully downloaded.