



## **Online Campaign Finance Filing System**

### **e-File User Guide**

**Office of the City Clerk  
City of Colorado Springs**

**Version 1.5**



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## 1 Introduction

This user guide provides step-by-step instructions for the general public and for E-filers to use the City of Colorado Springs Online Campaign Finance Filing System. No registration is required for general users who only wish to search for filed reports, download data associated with those reports or to request notifications of changes to elections or campaigns. E-filers, those submitting filings on behalf of candidates or committees, must register with the City Clerk's Office. The Online Campaign Finance Filing System can be accessed at <https://www.springsgov.com/CampaignFinance>.

The Online Campaign Finance Filing System is intended to allow E-filers to electronically submit forms in compliance with City Code section [5.2.101](#) through section [5.2.105](#), as well as City Code section [5.2.201](#) through section [5.2.211](#). See the City Code at [coloradosprings.gov/citycode](http://coloradosprings.gov/citycode) for specific requirements.

Please note filing online is not required, but is strongly encouraged. Paper filings may also be submitted to the City Clerk's Office at 30 S. Nevada Ave., Suite 101, Colorado Springs, CO 80903.

*This user guide is available for download. Look in the lower, right-hand corner of any webpage in the Online Campaign Finance Filing System. If you have feedback regarding this user guide, please email to [ColoradoSpringsElections@coloradosprings.gov](mailto:ColoradoSpringsElections@coloradosprings.gov) so we can incorporate your suggestions in future revisions.*

## 2 Overview of the Online Campaign Finance Filing System

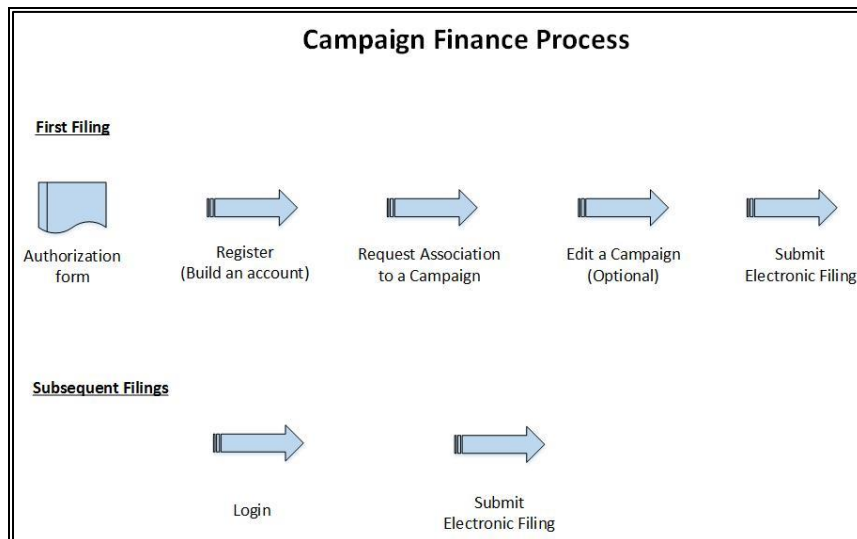


Figure 1 – Campaign Finance Process Diagram



The Online Campaign Finance Filing System allows individuals who submit filings for campaigns to submit forms electronically. In order to obtain full access to the online system, E-filers first need to submit a [Campaign Finance Electronic Filing Authorization](#) form to the City Clerk's Office. This form requests authorization to file on behalf of a candidate or committee. The form must be signed by either the candidate or an authorized representative of a committee.

Once the City Clerk's Office has received and approved the [Campaign Finance Electronic Filing Authorization](#) form, user accounts will be created in the online system and associated with their authorized campaign. Once an account is established, E-filers will have the ability to update campaign information, like address and financial institution information required for electronic filings. E-filers can also update campaign contact information, like website, email address and phone number.

E-filers will use the online system to complete forms and schedules that make up a filing. Once a filing has been submitted, it will be immediately available for viewing by the general public. Filings can also be amended at any time.

All users, with or without a user account, can view campaign information, search for filed reports, download data for filed reports and sign up for email notifications.

The City Clerk's Office will establish the elections, reporting periods, candidates, committees and ballot items (both races and issues) for each election. The City Clerk's Office also has the ability to transfer ending balance funds from previous elections to a current election.

## 3 Logging in

This section contains instructions for registering, logging in and resetting passwords. E-filers can set up their own online accounts and edit them at any point. The City Clerk's Office can also access/edit E-filer accounts, but cannot access security information such as passwords.

### 3.1 Self-Registration

First time users can register online, but will need to submit a [Campaign Finance Electronic Filing Authorization](#) form. This form must be **signed by a candidate**, or in the case of an issue or political committee, **signed by the representative of that committee**. There is a link to this form on the Registration page. Users will not be able to submit online filings until the signed authorization form is received and approved by the City Clerk's Office. Users may also request to be associated to a particular campaign. The request will remain in "Pending" status until the authorization form is processed.

These steps should be followed to log in for the first time:

- 1) Click on the **Register** link in the top right-hand corner of the Campaign Finance Home page.



CAMPAIGN FINANCE HOME HELP CONTACT Register Log in

Welcome to the City of Colorado Springs Campaign Finance Application

The City of Colorado Springs requires disclosure of information relating to campaign finance. Candidates, candidate committees, issue committees, and political committees must file the disclosure statements. See City Code sections 5.2.201 through section 5.2.211 for more detailed information.

There are no limits on the amount of contributions to a candidate or committee. However, all contribution sources for candidates, candidate committees, political committees, and issue committees are required to disclose periodically a "Report of Contributions and Expenditures."

The threshold that triggers the requirement to file is very low. Once a candidate or a committee has expenditures OR receipts of \$20 dollars or more during the election cycle, reporting is required for ALL reporting periods. Later reporting periods may not have any expenditures or receipts, but reporting is still required. The threshold for issue committees is higher at \$200. Once reporting is required, candidates and committees must report all contributions and expenditures. Contributions and expenditures of \$20 or greater must be itemized. Specific information about each contributor must be reported. Loans must also be reported.

If you are not sure whether a contribution must be reported, it is advisable to report it. There is no harm in over reporting.

Current election information is available at <http://coloradosprings.gov/election/>

Public/Media

Sign-up for Email Notifications

Reports and Data

Search Filings and Download Filing Data

© 2014 - City of Colorado Springs - Campaign Finance For additional help please read the [User Guide](#)

- 2) Click on the authorization form link to download the [Campaign Finance Electronic Filing Authorization](#) form. This PDF has fillable fields, so you can enter everything except for the signature. You will need to print out the form for an ink signature before submitting to the City Clerk's Office.
- 3) Complete all fields and click on the **Register** button. Keep in mind that the phone and email information is provided for the City Clerk's Office to contact you directly. It will not be shown anywhere on the website.

Register

Candidates/Committees

To establish an account to file electronically or to allow another to file electronically on their behalf, the Candidate or Committee representative will need to complete an [authorization form](#), with original signature, and file with the city clerk's office.

[Campaign Finance Electronic Filing Authorization](#)

Public/Media

Sign-up for email notifications

Search filings & Download filing data

Create a new account

First Name

Last Name

Phone

Email

Confirm Email

Security Question

Security Answer

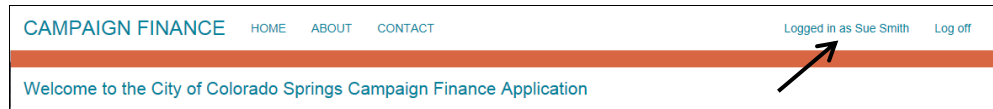
Password

Confirm password

Register

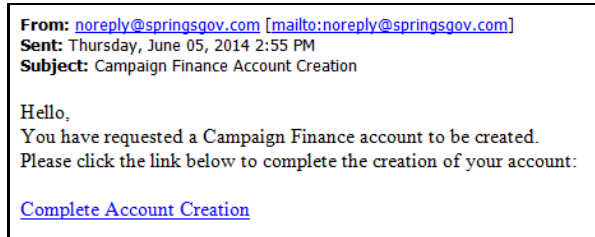


- 4) You will be taken back to the Home page, where your login name will be displayed in the upper right hand corner of the page:



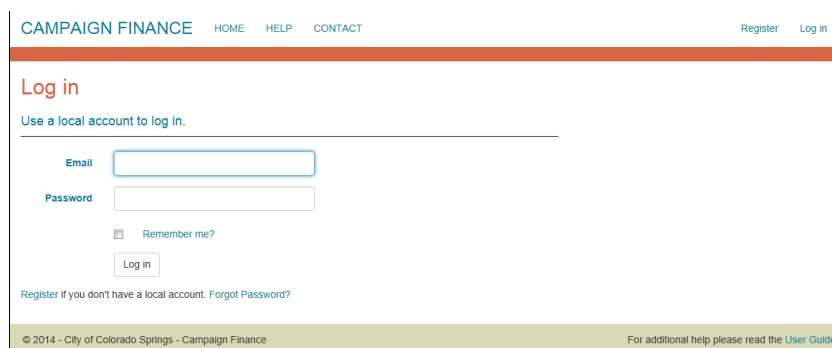
### 3.2 Clerk Registration

If a user submits a [Campaign Finance Electronic Filing Authorization](#) form, signed by a candidate or representative of a committee, but does not complete the online registration, the City Clerk's Office will complete the registration. In this case, the user will receive the following email, with a link to complete the process.



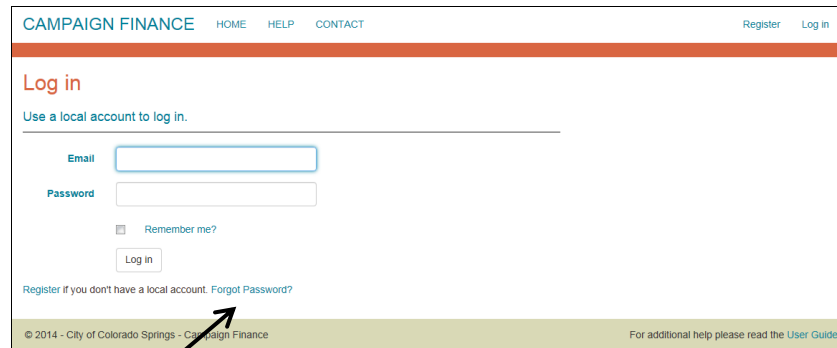
### 3.3 Logging in

- 1) Registered users can click on the **Log in** link in the upper right-hand corner of the Home page. When the following page appears, complete both fields and click on the **Log in** button. You will be taken to the Campaign Finance Home page. Please note after 1 hour of inactivity, users will automatically be logged out of the system.



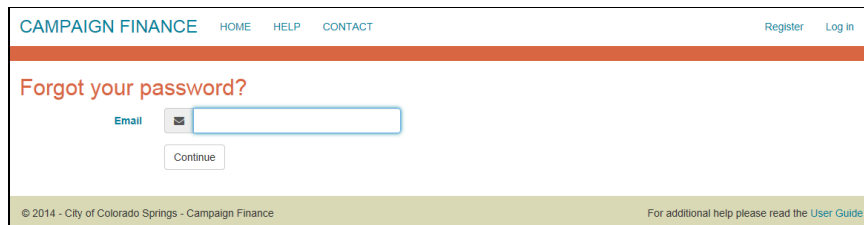
### 3.4 Forgot Password

- 1) To reset a forgotten password, click on the **Forgot Password?** link at the bottom of the Log in page.



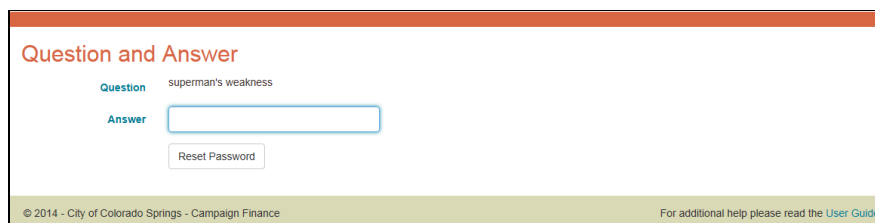
The screenshot shows the 'Log in' page of the Campaign Finance system. At the top, there are navigation links for 'HOME', 'HELP', and 'CONTACT', along with 'Register' and 'Log in' buttons. The main heading is 'Log in' with the instruction 'Use a local account to log in.' Below this are input fields for 'Email' and 'Password', a 'Remember me?' checkbox, and a 'Log in' button. At the bottom of the form area, there are links for 'Register if you don't have a local account.' and 'Forgot Password?'. An arrow points to the 'Forgot Password?' link. The footer contains copyright information and a link to the User Guide.

- 2) Enter your email address and click on the **Continue** button.



The screenshot shows the 'Forgot your password?' page. It features an 'Email' input field with an envelope icon and a 'Continue' button below it. The page layout is consistent with the previous screenshot, including the navigation bar and footer.

- 3) You will be prompted to enter the answer to the security question you created during initial registration. Then click on the **Reset Password** button. You will receive an email with instructions to reset your password.



The screenshot shows the 'Question and Answer' page. It displays a 'Question' field with the text 'superman's weakness' and an 'Answer' input field. Below the input fields is a 'Reset Password' button. The page layout is consistent with the previous screenshots.

## 4 Editing User Account Information

The Manage Account page is used to make changes to your E-filer account.

- 1) After logging in, click on your name in the upper right-hand corner of the Home page. You will be taken to the Manage Account page.



A screenshot of the "Manage Account" page. The page has a header with "CAMPAIGN FINANCE" and navigation links "HOME", "HELP", and "CONTACT". On the right, it says "Logged in as Sue Smith" and "Log off". The main content area is titled "Manage Account." and "Account Information". It displays the following information: First Name: Sue, Last Name: Smith, Phone: 7192223333, Email: ssmith@efiler.com, Security Question: superman's weakness, Security Answer: kryptonite. At the bottom of the information section are two buttons: "Edit" and "Change Password". The footer contains "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 2) Click on the **Edit** button to go the Edit page. Edit your information as needed and click on the **Save** button. You must confirm your email address to save. Keep in mind that the phone and email information is provided for the City Clerk's Office to contact you directly. It will not be shown anywhere on the website.

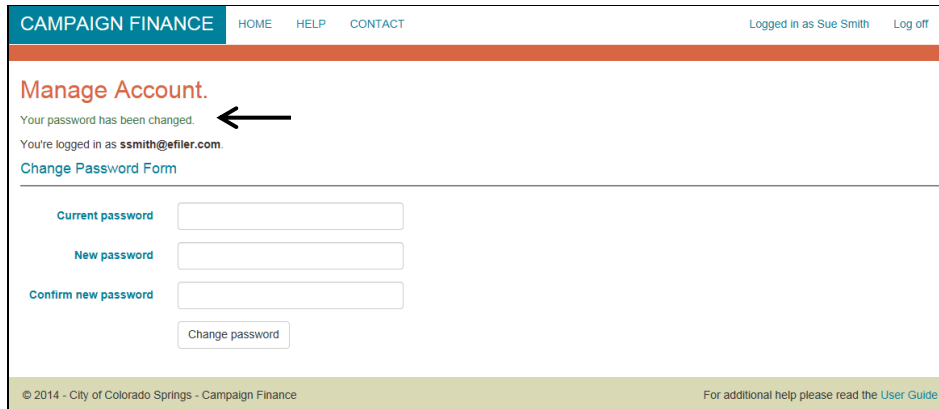
A screenshot of the "Edit Account" page. The page has a header with "CAMPAIGN FINANCE" and navigation links "HOME", "HELP", and "CONTACT". On the right, it says "Logged in as Sue Smith" and "Log off". The main content area is titled "Edit Account" and "Edit Efiler Account". It displays the following form fields: First Name (input field with "Sue"), Last Name (input field with "Smith"), Phone (input field with "7192223333"), Email (input field with "ssmith@efiler.com"), Confirm Email (input field), Security Question (input field with "superman's weakness"), Security Answer (input field with "kryptonite"), and a "Save" button. The footer contains "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 3) Or, click on the **Change Password** button on the Manage Account page if you need to change your password.

A screenshot of the "Change Password Form" page. The page has a header with "CAMPAIGN FINANCE" and navigation links "HOME", "HELP", and "CONTACT". On the right, it says "Logged in as Sue Smith" and "Log off". The main content area is titled "Manage Account." and "Change Password Form". It displays the following information: "You're logged in as ssmith@efiler.com". Below this are three input fields: "Current password", "New password", and "Confirm new password". At the bottom of the form is a "Change password" button. The footer contains "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".



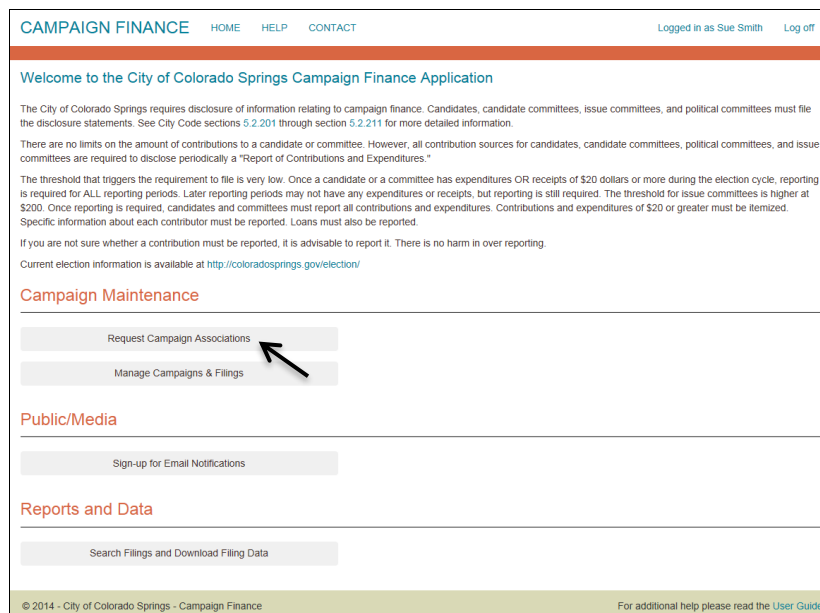
- 4) After clicking on the **Change Password** button, you will see confirmation text appear. Click on the **Home** link at the top of the page after changing your password.



## 5 Requesting Association to a Campaign

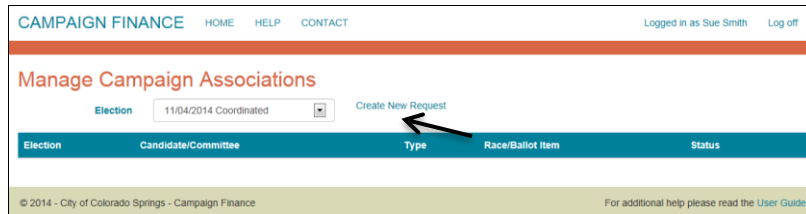
E-filers must submit a request to be associated to a particular campaign. This is a prerequisite to editing campaign profiles or to creating electronic filings.

- 1) On the Home page, click on the **Request Campaign Associations** link.

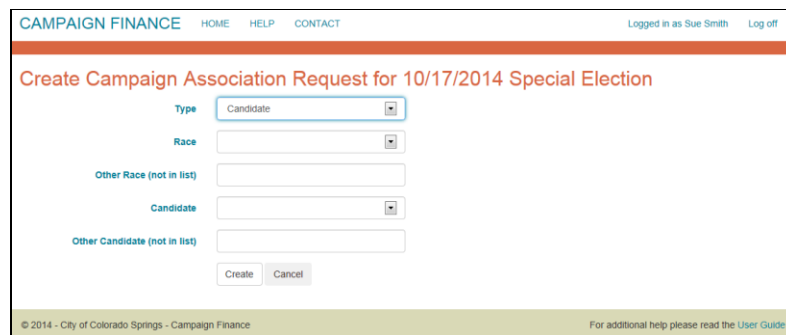




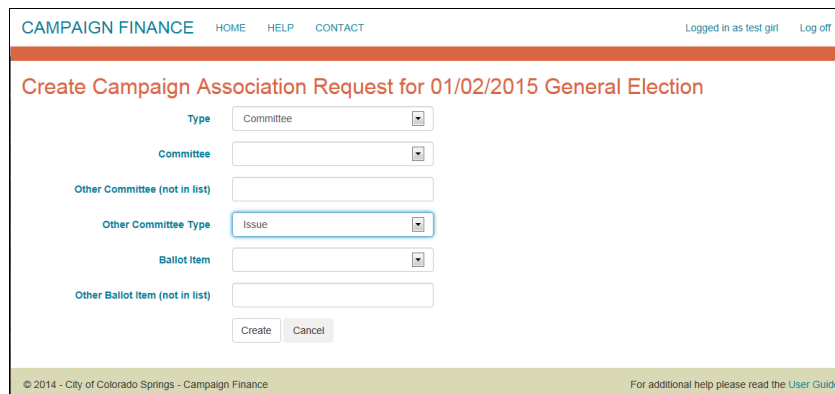
- 2) On the Manage Campaign Associations page, select the election you wish to be associated with from the dropdown list. If the desired election is not listed, it is not an active election as defined by the City Clerk’s Office, and therefore an association cannot be created. Click on the **Create New Request** link after selecting the correct election.



- 3) Complete the necessary fields on the Create Campaign Association Request page and click on the **Create** button. If the Race or Candidate/Committee selections in the dropdown lists are not the desired ones, you may type information into the **Other** fields. In the example shown below, a Candidate association is being requested.



Notice in this example that the type of association being requested is Committee, which defaults to an Issue Committee.



If instead a Political Committee is selected (shown below), notice the Ballot item is no longer required.



The screenshot shows a web form titled "Create Campaign Association Request for 01/02/2015 General Election". The form includes several dropdown menus: "Type" (set to "Committee"), "Committee", "Other Committee (not in list)", and "Other Committee Type" (set to "Political"). There are "Create" and "Cancel" buttons at the bottom. The page header includes "CAMPAIGN FINANCE", "HOME", "HELP", "CONTACT", and "Logged in as test girl Log off". The footer contains "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 4) Your request will be reflected as having a Pending status until the City Clerk approves it. Approval is obtained by submitting a [Campaign Finance Electronic Filing Authorization](#) form **signed by a candidate or representative of a committee**. Once approved, the status will change to Open. Clicking on the **Remove** link will delete your request. To create another request, select another election from the dropdown list and click on the **Create New Request** link. E-filers must submit a [Campaign Finance Electronic Filing Authorization](#) form **signed by a candidate or representative of a committee**, corresponding to each association request.

The screenshot shows the "Manage Campaign Associations" page. It features a dropdown menu for "Election" set to "11/04/2014 Coordinated" and a "Create New Request" link. Below is a table with the following data:

Election	Candidate/Committee	Type	Race/Ballot Item	Status	
10/17/2014 Special	Peter Parker	Candidate	city clerk	Pending	<a href="#">Remove</a>

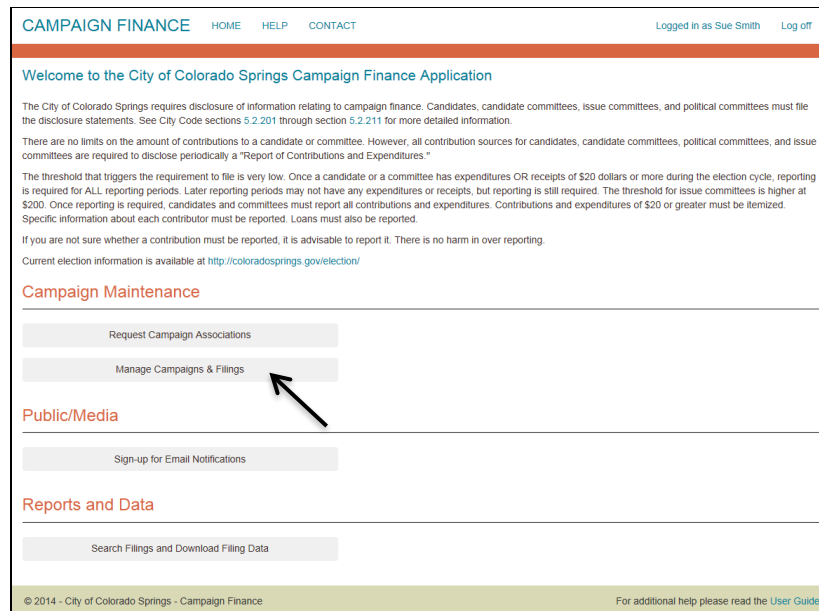
The page header includes "CAMPAIGN FINANCE", "HOME", "HELP", "CONTACT", and "Logged in as Sue Smith Log off". The footer contains "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 5) Requests will usually be approved or denied within 3 business days. Notification will be sent to the e-mail address on file. Once approved, E-filers will be considered active users, and have the ability to edit accounts, edit associated campaigns and submit electronic filings.

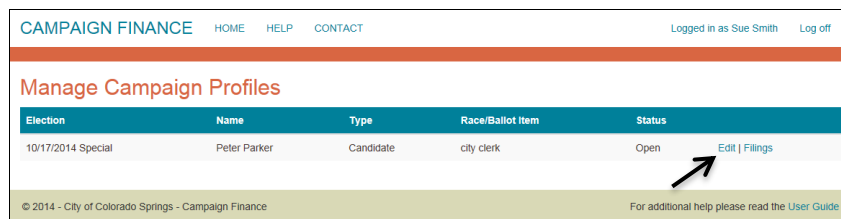
## 6 Edit the Campaign Profile

E-filers need to edit the detailed information of the campaign profile once their association is active. The information is required for completed filings. This also provides contact information to the public for the campaign (phone, address, email, website, etc.) **This should be the first thing you do after your campaign association is approved.**

- 1) Click on the **Manage Campaigns & Filings** link on the Home page.



2) On the Manage Campaign Profiles page, click on the **Edit** link for the correct campaign.



3) The Edit Campaign Profile page has fields for addresses, web site and financial institution information. The Campaign Address and Financial Institution Address information is used when generating the Report of Contributions & Expenditures. Mailing Address and campaign contact information (web site, email, phone) are optional. These can be entered for use by the general public. Clicking on the **Save** button will return you to the Manage Campaign Profiles page.



CAMPAIGN FINANCE		HOME	HELP	CONTACT
<b>Edit Campaign Profile.</b>				
<b>Campaign Address</b>				
Street	Skywalker Ranch Rd			
City	Nicasio			
State	CA	Zip Code	94946	
<b>Mailing Address</b>				
Street	PO Box C3P0			
City	Novato			
State	CA	Zip Code	94948	
<b>Campaign Web Site Address</b>				
http://lucasfilm.com/skywalker-ranch				
<b>Campaign Contact Email</b>				
george@lucasfilm.com				
<b>Campaign Contact Phone</b>				
7193855113				
<b>Financial Institution Address</b>				
<b>Financial Institution Name</b>				
Mountain View Bank				
<b>Street</b>				
24 S Weber St				
<b>City</b>				
Colorado Springs				
<b>State</b>				
CO				
<b>Zip Code</b>				
80903				

## 7 Manage an E-Filing

Reporting periods are created by the City Clerk’s Office. The designated time to file – known as the filing period – is usually the five days at the end of a reporting period. You may create and e-filing once the filing period has begun. Please refer to [www.ColoradoSprings.gov/Election](http://www.ColoradoSprings.gov/Election) for specific details and exceptions on filing dates (holidays, etc.).

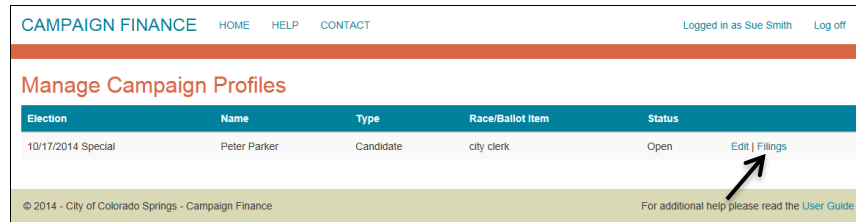
### 7.1 Creating an E-filing

- 1) On the Home page, click on the **Manage Campaigns & Filings** link.

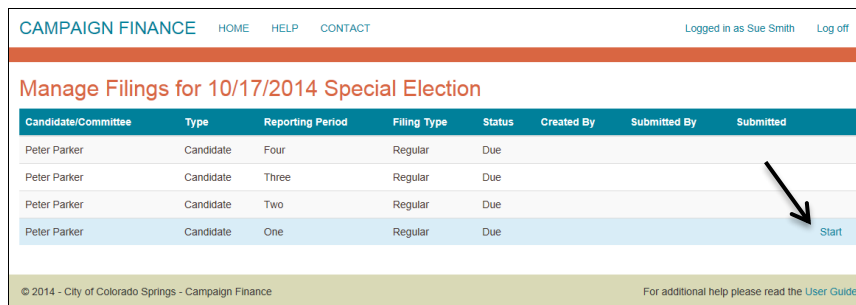
CAMPAIGN FINANCE		HOME	HELP	CONTACT
Logged in as Sue Smith Log off				
<b>Welcome to the City of Colorado Springs Campaign Finance Application</b>				
<p>The City of Colorado Springs requires disclosure of information relating to campaign finance. Candidates, candidate committees, issue committees, and political committees must file the disclosure statements. See City Code sections 5.2.201 through section 5.2.211 for more detailed information.</p> <p>There are no limits on the amount of contributions to a candidate or committee. However, all contribution sources for candidates, candidate committees, political committees, and issue committees are required to disclose periodically a "Report of Contributions and Expenditures."</p> <p>The threshold that triggers the requirement to file is very low. Once a candidate or a committee has expenditures OR receipts of \$20 dollars or more during the election cycle, reporting is required for ALL reporting periods. Later reporting periods may not have any expenditures or receipts, but reporting is still required. The threshold for issue committees is higher at \$200. Once reporting is required, candidates and committees must report all contributions and expenditures. Contributions and expenditures of \$20 or greater must be itemized. Specific information about each contributor must be reported. Loans must also be reported.</p> <p>If you are not sure whether a contribution must be reported, it is advisable to report it. There is no harm in over reporting.</p> <p>Current election information is available at <a href="http://coloradosprings.gov/election/">http://coloradosprings.gov/election/</a></p>				
<b>Campaign Maintenance</b>				
Request Campaign Associations				
Manage Campaigns & Filings				
<b>Public/Media</b>				
Sign-up for Email Notifications				
<b>Reports and Data</b>				
Search Filings and Download Filing Data				
© 2014 - City of Colorado Springs - Campaign Finance				
For additional help please read the <a href="#">User Guide</a>				



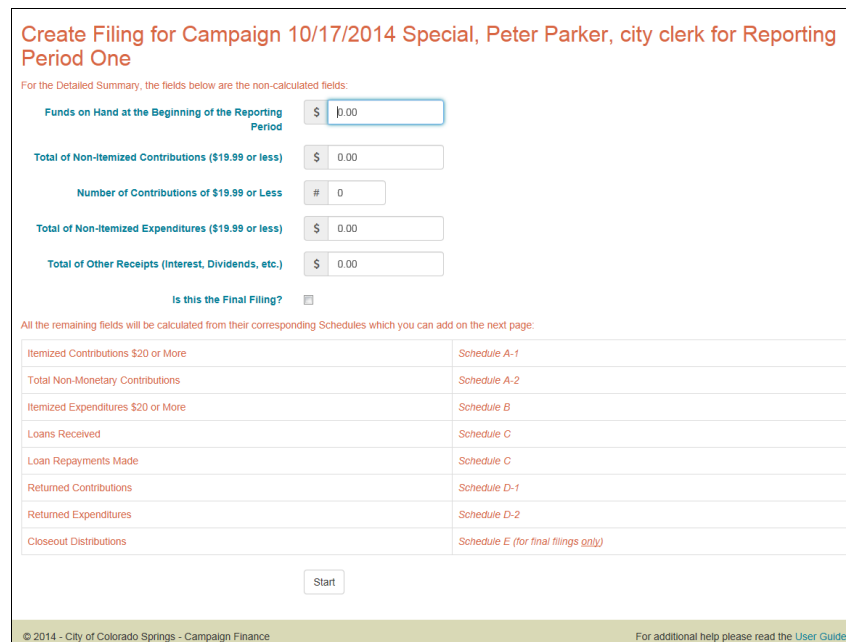
- 2) On the Manage Campaign Profiles page, click on the **Filings** link.



- 3) On the Manage Filings page, the status of the filing for each reporting period is shown. When the date falls within the designated window, or is past due, a **Start** link will appear. Click on Start to go to the Create Filing for Campaign page.



- 4) On the Create Filing for Campaign page, complete the fields on the Report of Contributions & Expenditures. The first filing has a default starting balance of 0.00. If you have already submitted a filing, your ending balance carries over to the beginning balance of the next period. The next filing beginning balance **MUST** match the previous ending balance.





Note that the **Number of Contributions of \$19.99 or Less** field is to indicate a count of how many contributions were made, not the dollar amount.

If this is the final filing for a campaign, check the box **Is this the Final Filing?** A Schedule E – Closeout Distributions will need to be filed (see *Section 8.8* below).

- 5) After clicking on the **Start** button, you will be taken to the Create Filing (for the associated Reporting Period) page. To view the .pdf file of the report, click on the Report of Contributions and Expenditures title link. To edit fields just completed, click on the **Edit** link.

If this is the only form you are going to submit for the filing, click on the **Submit Filing** button. You will be asked if you are sure you're ready to submit.

To create another form for this filing, you will select the Schedule needed from the dropdown list and click on the **Add New Form** link. See the next section, *Filing Schedules*.

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit

## 7.2 Preview E-filing forms prior to submittal

- 1) A filing is considered InProgress until it is either submitted or cancelled. While a filing is InProgress, you may want to preview the forms to see how they will appear prior to submitting your filing. You can click on any of the forms in the Detail column to see the preview.

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit
Schedule A-1	Schedule A-1: Itemized Contributions Statement (\$20 or More)	Sally Ericksen   Edit   Delete

- 2) This will open a new window with a PDF preview of the form. For example, a Report of Contributions and Expenditures looks like this (be aware that the campaign information entered in Section 6 above, populates the top of this form):





REPORT OF CONTRIBUTIONS AND EXPENDITURES	
Full Name of Committee/Person:	George Lucas
As Shown on Registration	
Address of Committee/Person	Skywalker Ranch Rd
City, State & Zip Code:	Nicasio, CA, 94946
Committee Type:	
Name of Financial Institution:	Mountain View Bank
Address of Financial Institution	24 S Weber St
City, State & Zip Code of Financial Institution	Colorado Springs, CO, 80903
Type of Request	

- 3) For forms with multiple entries (i.e. Schedule A-1, A-2, B, D-1 and D-2), click on any of the detail items will show the complete form with all detail lines.

Schedule A - 1 - Itemized Contributions Statement (\$20 or More)	
Full Name of Committee/Person:	George Lucas
<b>WARNING: Please read the instruction page for Schedule "A" before completing!</b>	
Please Print/Type	
1. Name (Last, First):	Ericksen, Sally
2. Address:	30 s nevada ave
3. City/State/Zip:	colorado springs, CO, 80903
4. Description:	personal check
5. Employer (mandatory if employed):	
6. Occupation (mandatory if employed):	
7. Date Accepted:	05/12/2014
8. Aggregate Amount this Election Cycle:	\$456.00
9. Contribution Amount this Reporting Period:	\$456.00
1. Name (Last, First):	Chaplin, Harold
2. Address:	30 s nevada ave
3. City/State/Zip:	colorado springs, CO, 80903
4. Description:	Cash
5. Employer (mandatory if employed):	
6. Occupation (mandatory if employed):	Retired
7. Date Accepted:	05/30/2014
8. Aggregate Amount this Election Cycle:	\$295.00
9. Contribution Amount this Reporting Period:	\$95.00

### 7.3 Updating an E-filing

- 1) A filing is considered InProgress until it is either submitted or cancelled. You can suspend your work on a campaign finance filing as long as you have saved the current schedule. When you Log back in to the Campaign Finance Filing System and return to the Filings section, any unfinished filings will be shown as InProgress. Clicking the **Update** link allows you to continue your previous work.

Candidate/Committee	Type	Reporting Period	Filing Type	Status	Created By	Submitted By	Submitted
Captain America	Candidate	Four	Regular	Due			
Captain America	Candidate	Three	Regular	Due			
Captain America	Candidate	Two	Regular	Due			
Captain America	Candidate	One	Regular	InProgress	Fidel Castro		<a href="#">Update</a>   <a href="#">Cancel Filing</a>

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## 7.4 *Canceling an incomplete E-filing*

- 1) If you wish to discard your InProgress filing, you can click the **Cancel Filing** link. After confirmation, your unsubmitted filing will no longer exist.

## 8 Filing Schedules

A filing must first be started by logging in, clicking on the **Manage Campaigns & Filings** button on the Home page, selecting the intended campaign from the Manage Campaign Profiles page, and then clicking on the **Filings** link on the Manage Filings page. The Report of Contributions & Expenditures must be completed before other Schedules can be added.

To start a new form, select the Schedule needed from the dropdown list and click on the **Add New Form** link. For all the forms, the information entered on the page is transcribed into a .pdf document.

### 8.1 *Report of Contributions & Expenditures*

There is no need to select this form; it was created on the Start a New Filing page. It can, however, be edited at any time by clicking on the **Edit** link on the Manage Filings page.

### 8.2 *Schedule A-1: Itemized Contributions Statement (\$20 or More)*

This Schedule needs to be completed if there are itemized contributions of \$20 or more. It can be completed online, or a file can be uploaded by selecting the **Upload Schedules** link. Multiple Schedules can be created by uploading a file that lists them all. See *Section 8.2.2* below for instructions on uploading a file.

#### 8.2.1 *Completing A-1 online*

- 1) Select Schedule A-1 from the dropdown list on the Create (Amend) Filing page and click on the **Add New Form** link.

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit



- 2) Complete the fields and click on the **Create and Return** button. If you would like to add another Schedule A-1 to this filing, click on the **Create and Add Another** button instead.
  - i. For a company/corporate name, leave First Name blank and use Last Name for the company/corporate name
  - ii. Description should indicate the form of payment: Cash, Check, Money Order, etc.

CAMPAIGN FINANCE HOME ABOUT CONTACT Logged in as Super Man Log off

**Create Schedule A-1 for the June 1 Reporting Period for the 11/05/2014 General Election**

Donor First Name

Donor Last Name

Address

City

State  Zip Code

Description

Employer

Occupation

Date Accepted

Aggregate Amount this Election Cycle \$

Contribution Amount this Reporting Period \$

- 3) You will be taken back to the Create (Amend) Filing page, where you can click on the **Submit Filing** button, or choose another Schedule to add to the filing.

CAMPAIGN FINANCE HOME HELP CONTACT Logged in as test girl Log off

**Create Filing for the P3 Reporting Period for the 04/07/2015 Municipal Election**

Document to Add

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		<input type="button" value="Edit"/>
Schedule A-1	Schedule A-1: Itemized Contributions Statement (\$20 or More)	Tom Thompson	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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## 8.2.2 Uploading A-1

- 1) Click on the **Upload Schedules** link. Please note you may only upload schedules A-1, A-2 and B.



2) From the dropdown list, select Schedule A-1.

3) Click on the **Browse** button to find the correct file.

**Please note:** Only newer-format Microsoft Excel files (xlsx work, xls do not work) or comma delimited files can be uploaded. The .pdf forms found at <http://coloradosprings.gov/election/> or Google Docs cannot be used to upload. The data in the file must also be in the correct format for it to be uploaded. Data that is missing or invalid will appear on the page highlighted in red, and will **not** upload into the Online Campaign Finance Filing System. For Schedule A-1 the data file should have 12 columns, as described below:

- First name (leave this blank for a company name)
- Last name (or company name)
- Address
- City
- State
- Zip code
- Description
- Employer
- Occupation
- Date accepted
- Aggregate amount this election cycle
- Contribution amount this reporting period

Column headings should not be in the file for upload – only the data itself.



- After selecting the correct file to upload, click on the **Upload File** button. An example upload is shown below. Note the lines highlighted in red; these records will not be uploaded until they are corrected in the file, and the file is uploaded again. Only those lines that are white will appear as Schedule A-1's.

- The Schedule A-1 records can then be created by clicking on the **Create Records** button.

- Back on the Create Filing page, submit the filing if it is complete, or continue adding other schedules.

### 8.3 Schedule A-2: Statement of Non-Monetary Contributions

This Schedule needs to be completed if there are non-monetary contributions, creating one form per donor. Schedule A-2's can be individually created by completing the page online, or multiple Schedules can be created by uploading a file that lists them all. See Section 8.3.2 below for uploading instructions.

#### 8.3.1 Completing A-2 online

- Select Schedule A-2 from the dropdown list on the Create (Amend) Filing page and click on the **Add New Form** link.



- 2) Complete the fields and click on the **Create and Return** button. If you would like to add another Schedule A-2 to this filing, click on the **Create and Add Another** button instead.

- 3) You will be taken back to the Create (Amend) Filing page, where you can click on the **Submit Filing** button, or choose another Schedule to add to the filing.

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit
Schedule A-2	Schedule A-2: Statement of Non-Monetary Contributions	Marco's Pizza   Edit   Delete

### 8.3.2 Uploading A-2

- 1) Click on the **Upload Schedules** link on the Create Filings page.

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit



2) From the dropdown list, select Schedule A-2.

A screenshot of the "Upload Schedule Data" form in the Campaign Finance system. The form has a header with "CAMPAIGN FINANCE" and navigation links for "HOME", "HELP", and "CONTACT". It shows the user is logged in as "test girl". The "Document Type" dropdown menu is set to "Schedule A-2: Statement of Non-Monetary Contributions". Below this is a "File" input field with a "Browse..." button, which is highlighted by a black arrow. There are also "Create Records", "Cancel", and "Upload File" buttons. The footer contains copyright information for 2014 and a link to the User Guide.

3) Click on the **Browse** button to find the correct file.

**Please note:** Only newer-format Microsoft Excel files (xlsx work, xls do not work) or comma delimited files can be uploaded. Google Docs cannot be used to upload. The data in the file must also be in the correct format for it to be uploaded. Data that is missing or invalid will appear on the page highlighted in red, and will **not** upload into the Online Campaign Finance Filing System. For Schedule A-2 the data file should have 12 columns, as described below:

- First name
- Last name (or company name)
- Address
- City
- State
- Zip code
- Description
- Employer
- Occupation
- Date provided
- Aggregate amount
- Fair Market Value

Column headings should not be in the file to upload – only the data itself.

4) After selecting the correct file to upload, click on the **Upload File** button. An example upload is shown below. Note the lines highlighted in red; these records will not be uploaded until they are corrected in the original file, and the file is uploaded again. Only those lines that are white will appear as Schedule A-2's.



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### Upload Schedule Data

Document Type: Schedule A-2: Statement of Non-Monetary Contributions

File:  Browse... Upload File

Name	Address	Comment	Employer	Occupation	Date	Sum	Amount	Error
name name2	1234 street, city, CO, 80908	comment	navy	sailor		\$550.00	\$20.00	Missing Date
name name2	1234 street, city, CO, 80916	comment	navy	sailor	06/26/2014	\$800.00	\$20.00	
name name2	5467 road, city, CO, 80908	comment	navy	sailor	06/26/2014	\$550.00	\$20.00	
name name2	1234 street, city, CO, 80908	comment	army	soldier	06/26/2014	\$550.00	\$20.00	

Create Records Cancel

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- 5) The Schedule A-2 records can then be created by clicking on the **Create Records** button.

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### Create Filing for the P3 Reporting Period for the 04/07/2015 Municipal Election

Document to Add: Schedule A-1: Itemized Contributions Statement (\$20 or More) Add New Form Upload Schedules

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		Edit
Schedule A-2	Schedule A-2: Statement of Non-Monetary Contributions	Marco's Pizza	Edit   Delete
Schedule A-2	Schedule A-2: Statement of Non-Monetary Contributions	name name2	Edit   Delete
Schedule A-2	Schedule A-2: Statement of Non-Monetary Contributions	name name2	Edit   Delete
Schedule A-2	Schedule A-2: Statement of Non-Monetary Contributions	name name2	Edit   Delete

Submit Filing Cancel

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- 6) Back on the Create (Amend) Filing page, click on the **Submit Filing** button if it is complete, or continue adding other schedules.

## 8.4 Schedule B: Itemized Expenditures Statement (\$20 or More)

This Schedule needs to be completed if there are itemized expenditures of \$20 or more, creating one form per expenditure. Schedule B's can be individually created by completing the page online, or multiple Schedules can be created by uploading a file that lists them all.

### 8.4.1 Completing Schedule B online

- 1) Select Schedule B from the dropdown list on the Create (Amend) Filing page and click on the **Add New Form** link.



This screenshot shows the 'Create Filing' page in the Campaign Finance e-Filing system. The page title is 'Create Filing for the P2 Reporting Period for the 04/07/2015 Municipal Election'. Below the title, there is a 'Document Type to Add' dropdown menu set to 'Schedule B: Itemized Expenditures Statement (\$20 or More)'. To the right of the dropdown are two buttons: 'Add New Form' and 'Upload Schedules'. Below this is a table with two columns: 'Document Type' and 'Detail'. The table contains one row with 'Report of C&E' in the 'Document Type' column and 'Report of Contributions and Expenditures' in the 'Detail' column. To the right of the table is an 'Add Donor Name' button. Below the table are 'Submit Filing' and 'Cancel' buttons. The footer of the page includes '© 2014 - City of Colorado Springs - Campaign Finance' and a link to the 'User Guide'.

- 2) Complete the fields and click on the **Create and Return** button. If you would like to add another Schedule B to this filing, click on the **Create and Add Another** button instead.

This screenshot shows the 'Create for P2 Reporting Period' page in the Campaign Finance e-Filing system. The page title is 'Create for P2 Reporting Period for the 04/07/2015 Municipal Election'. Below the title, there is a 'Schedule B: Itemized Expenditures Statement (\$20 or More)' section. The form contains several fields: 'First Name', 'Last Name or Business Name', 'Street', 'City', 'State' (a dropdown menu), 'Zip Code', 'Purpose of Expenditure', 'Date Expended' (a date picker set to 09/23/2014), and 'Amount' (a currency field set to \$ 0.00). At the bottom of the form are three buttons: 'Create and Return', 'Create and Add Another', and 'Cancel'. The footer of the page includes '© 2014 - City of Colorado Springs - Campaign Finance' and a link to the 'User Guide'.

- 3) Note that if this filing was marked as "final" on the Report of Contributions and Expenditures page, then the Schedule B page contains an additional field – a **Charitable Organization** checkbox to indicate whether the expenditure was made to a charity.



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Schedule B: Itemized Expenditures Statement (\$20 or More)

Create for P3 Reporting Period for the 04/07/2015 Municipal Election

First Name

Last Name or Business Name

Street

City

State  Zip Code

Purpose of Expenditure

Date Expended

Amount \$

Charitable Organization

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- 4) You will be taken back to the Create (Amend) Filing page, where you can click on the **Submit Filing** button or choose another Schedule to add to the filing.

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Create Filing for the P2 Reporting Period for the 04/07/2015 Municipal Election

Document to Add

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		<a href="#">Edit</a>
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	The Home Depot	<a href="#">Edit</a>   <a href="#">Delete</a>

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### 8.4.2 Uploading Schedule B

- 1) Click on the **Upload Schedules** link on the Create Filings page.

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Create Filing for the P2 Reporting Period for the 04/07/2015 Municipal Election

Document Type to Add

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		<a href="#">Edit</a>

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- 2) From the dropdown list, select Schedule B.

A screenshot of the "Upload Schedule Data" web form. The form has a header with "CAMPAIGN FINANCE" and navigation links "HOME", "HELP", and "CONTACT". On the right, it says "Logged in as test girl" and "Log off". The main heading is "Upload Schedule Data". Below this, there is a "Document Type" dropdown menu set to "Schedule B: Itemized Expenditures Statement (\$20 or More)". A "File" input field is present with a "Browse..." button. An arrow points to the "Browse..." button. To the right of the file field is an "Upload File" button. Below the file field are "Create Records" and "Cancel" buttons. At the bottom, there is a footer with "© 2014 - City of Colorado Springs - Campaign Finance" and a link to the "User Guide".

3) Click on the **Browse** button to find the correct file.

**Please note:** Only newer-format Microsoft Excel files (xlsx work, xls do not work) or comma delimited files can be uploaded. Google Docs cannot be used to upload. The data in the file must also be in the correct format for it to be uploaded. Data that is missing or invalid will appear on the page highlighted in red, and will **not** upload into the Online Campaign Finance Filing System. For Schedule B the data file should have 12 columns, as described below:

- First name
- Last name (or company name)
- Address
- City
- State
- Zip code
- Purpose of Expenditure
- (blank column needed here for spacing)
- (blank column needed here for spacing)
- Date Expended
- Amount
- Charity Indicator (Y or N value only)

Column headings should not be in the file to upload – only the data itself. Keep in mind that the Charity Indicator is only applicable for a "final" filing and will be ignored otherwise.

4) After selecting the correct file to upload, click on the **Upload File** button. An example upload is shown below. Note the line highlighted in red; highlighted records will not be uploaded until they are corrected in the original file, and the file is uploaded again. Only those lines that are white will appear as Schedule B's.



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### Upload Schedule Data

Document Type: Schedule B: Itemized Expenditures Statement (\$20 or More)

File:  Browse... Upload File

Name	Address	Comment	Employer	Occupation	Date	Sum	Charity	Error
Dave Jones	555 Main St, Denver, CO, 80113	office supplies			06/26/2014	\$550.00		
Sue Smith	180 Oak St, Colorado Springs, CO, 80909	entertainment			06/26/2014	\$230.00	Yes	
Office Max Inc.	2030 Powers, Colorado Springs, CO, 80916	office furniture			06/26/2014	\$1,100.00		
Dave Donaldson	1400 East Ave, Denver, CO, 80113	campaign supplies			06/30/2014	\$120.00		
Joan Fraser	2278 Dublin, Colorado Springs, CO, 80909	entertainment			06/30/2014		Yes	Missing Currency Value
3 Margartas Inc.	5766 Powers, Colorado Springs, CO, 80916	food			06/30/2014	\$300.00		

Create Records Cancel

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5) Click on the **Create Records** button to return to the Create (Amend) Filing page.

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### Create Filing for the P3 Reporting Period for the 04/07/2015 Municipal Election

Document to Add: Schedule A-1: Itemized Contributions Statement (\$20 or More) Add New Form Upload Schedules

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		Edit
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	Dave Jones	Edit   Delete
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	Sue Smith	Edit   Delete
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	Office Max Inc.	Edit   Delete
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	Dave Donaldson	Edit   Delete
Schedule B	Schedule B: Itemized Expenditures Statement (\$20 or More)	3 Margartas Inc.	Edit   Delete

Submit Filing Cancel

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6) Click on the **Submit Filing** button if it is complete, or continue adding other schedules.

## 8.5 Schedule C: Loans

This schedule is used to report any loans taken out in support of the campaign. Although it is a single form, there are two pages to complete it. The second page (Endorser) is optional.

- 1) On the Create (Amend) Filing page, select Schedule C from the dropdown list and click on the **Add New Form** link.



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Amend Filing for the First Report Reporting Period for the 11/04/2014 Coordinated Election

Document to Add Schedule C: Loans Add New Form Upload Schedules

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit

Submit Filing Cancel

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- In the first field, **Originator of Loan**, select whether the loan is from an institution or a person. Complete the rest of the fields and click on the **Create and Continue** button. **Please note:** Only enter an amount in the **Loan Amount Received this Reporting Period** if a new or an additional loan amount was received this during this reporting period (do not enter a previous or an original amount of a loan amount received in this field).

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Schedule C: Loans

Create for First Report Reporting Period for the 11/04/2014 Coordinated Election

Originator of Loan Institution

Institution Name

Street

City

State Zip Code

Original Amount of Loan \$ 0.00

Interest Rate % 0.00

Loan Amount Received this Reporting Period \$ 0.00

Principal Amount Paid this Reporting Period \$ 0.00

Interest Amount Paid this Reporting Period \$ 0.00

Outstanding Balance \$ 0.00

Date Loan Received 09/24/2014

Due Date for Final Payment 09/24/2014

Create and Continue Cancel

- The next page provides the option to add an endorser for the loan, by clicking on the **Add New Endorser** link. If there isn't one, click on the **Done** button to return to the Create (Amend) Filing page.

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Schedule C: Loans - Endorsers

Manage for First Report Reporting Period for the 11/04/2014 Coordinated Election

Add New Endorser

Full Name	Address	Amount Guaranteed

Done

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- 4) If there is an endorser, complete the fields and click on the **Create and Return** button. Or, if there is more than one endorser for the loan, click on the **Create and Add Another** button.

The screenshot shows the 'Manage for First Report Reporting Period for the 11/04/2014 Coordinated Election' page. It features a table with the following data:

Full Name	Address	Amount Guaranteed	
John Farmer	7600 Hwy 24, Falcon, CO, 80422	\$5,000.00	Edit   Delete

Below the table is a 'Done' button. The footer contains the text: '© 2014 - City of Colorado Springs - Campaign Finance' and 'For additional help please read the User Guide'.

- 5) After adding an endorser, click on the **Done** button to return to the Create (Amend) Filing page.

The screenshot shows the 'Amend Filing for the First Report Reporting Period for the 11/04/2014 Coordinated Election' page. It includes a 'Document to Add' dropdown menu set to 'Schedule A-1: Itemized Contributions Statement (\$20 or More)'. Below this is a table with the following data:

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		Edit
Schedule C	Schedule C: Loans	Bank of Marvel	Edit   Delete

At the bottom of the table are 'Submit Filing' and 'Cancel' buttons. The footer contains the text: '© 2014 - City of Colorado Springs - Campaign Finance' and 'For additional help please read the User Guide'.

- 6) Click on the **Submit Filing** button if the filing is complete, or continue adding other schedules.

## 8.6 Schedule D-1: Returned Contributions

Schedule D-1 needs to be filed when contributions made to the campaign now need to be returned.

- 1) On the Create (Amend) Filing page, select Schedule D-1 from the dropdown list and click on the Add New Form link.



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**Amend Filing for the First Report Reporting Period for the 11/04/2014 Coordinated Election**

Document to Add: Schedule D-1: Returned Contributions Add New Form Upload Schedules

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit

Submit Filing Cancel

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- 2) Complete the fields and click on the **Create and Return** button. Or, if additional contribution returns need to be filed, click on the **Create and Add Another** button.

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Schedule D-1: Returned Contributions

**Create for First Report Reporting Period for the 11/04/2014 Coordinated Election**

First Name:

Last Name or Business Name:

Street:

City:

State:  Zip Code:

Purpose for Returning Contribution:

Date Accepted:  09/24/2014

Date Returned:  09/24/2014

Amount: \$  0.00

Create and Return Create and Add Another Cancel

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- 3) Click on the **Submit Filing** button if the filing is complete, or continue adding other schedules.

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**Amend Filing for the First Report Reporting Period for the 11/04/2014 Coordinated Election**

Document to Add: Schedule A-1: Itemized Contributions Statement (\$20 or More) Add New Form Upload Schedules

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	Edit
Schedule D-1	Schedule D-1: Returned Contributions	Office Max Edit   Delete

Submit Filing Cancel

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## 8.7 Schedule D-2: Returned Expenditures

Schedule D-2 needs to be filed when expenditures made on behalf of the campaign need to be returned.

- 1) On the Create (Amend) Filing page, select Schedule D-2 from the dropdown list and click on the Add New Form link.

A screenshot of the Campaign Finance e-Filing system. The page title is "Amend Filing for the First Report Reporting Period for the 11/04/2014 Coordinated Election". The "Document to Add" dropdown menu is set to "Schedule D-2: Returned Expenditures". There are "Add New Form" and "Upload Schedules" links. Below this is a table with columns "Document Type", "Detail", and "Donor Name". The table contains one row: "Report of C&E", "Report of Contributions and Expenditures", and "Edit". At the bottom of the table are "Submit Filing" and "Cancel" buttons. The footer includes "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 2) Complete the fields and click on the **Create and Return** button. Or, if additional contribution expenditures need to be filed, click on the **Create and Add Another** button.

A screenshot of the Campaign Finance e-Filing system showing the "Create for First Report Reporting Period for the 11/04/2014 Coordinated Election" page for Schedule D-2. The page contains several input fields: "First Name", "Last Name or Business Name", "Street", "City", "State" (a dropdown menu), "Zip Code", "Purpose for Returning Expenditure", "Date Accepted" (09/24/2014), "Date Returned" (09/24/2014), and "Amount" (\$ 0.00). At the bottom are "Create and Return", "Create and Add Another", and "Cancel" buttons. The footer includes "© 2014 - City of Colorado Springs - Campaign Finance" and "For additional help please read the User Guide".

- 3) Click on the **Submit Filing** button if the filing is complete, or continue adding other schedules.





### 8.8 Schedule E: Closeout Distributions

A Schedule E must be completed for final filings. The checkbox on the Report of Contributions and Expenditures page, **Is this the Final Filing?**, must be checked before a Schedule E can be submitted.

Note that Schedule E should *not* be filed unless the remaining campaign balance is \$0 and the entire campaign is being permanently closed out. Please contact the City Clerk’s Office at (719) 385-5901 or [CityClerk@coloradosprings.gov](mailto:CityClerk@coloradosprings.gov) for further clarification on when to file a Schedule E – Closeout Distributions form.

- 1) On the Create (Amend) Filing page, select Schedule E from the dropdown list and click on the **Add New Form** link.

- 2) Complete the fields and click on the **Create and Return** button.

- 3) Click on the **Submit Filing** button if the filing is complete, or continue adding other schedules.



## 9 Amend a Filing

Filings may be amended at any time. However, amending a filing requires that all subsequently submitted filings be amended as well. For example, if a filing for the January reporting period is amended, the February, March, April and any subsequent reporting periods up to the current filing, will also need to be amended. Amending is very similar to creating an original filing.

- 1) Log in and click on the **Manage Campaigns & Filings** button on the Home page.

- 2) On the Manage Campaign Profiles page, click on the **Filings** link.



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### Manage Campaign Profiles

Election	Name	Type	Race/Ballot Item	Status	
10/17/2014 Special	Peter Parker	Candidate	city clerk	Open	<a href="#">Edit   Filings</a>
09/30/2014 Municipal	Bruce Wayne	Candidate	Mayor	Transferred	
10/17/2014 Special	Green Lantern	Candidate	city clerk	Open	<a href="#">Edit   Filings</a>

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3) On the Manage Filings page, click on the **Amend** link.

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### Manage Filings for 10/17/2014 Special Election

Candidate/Committee	Type	Reporting Period	Filing Type	Status	Created By	Submitted By	Submitted	
Green Lantern	Candidate	Four	Regular	Due				
Green Lantern	Candidate	Three	Regular	Due				
Green Lantern	Candidate	Two	Regular	Due				<a href="#">Start</a>
Green Lantern	Candidate	One	Regular	Submitted	Karen Page	Sue Smith	09/29/2014 02:07 PM	<a href="#">Amend   View Filing</a>

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4) You will be asked if you are sure you want to amend the filing. Click on the **Amend** link.

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### Amend Filing for the One Reporting Period for the 10/17/2014 Special Election

Document Type	Detail	Donor Name
Report of C&E	Report of Contributions and Expenditures	

Are you sure you wish to AMEND this filing?

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5) On the Amend Filing page, click on the **Edit** link to edit the report of Contributions and Expenditures, or add additional schedules as necessary. Click on the **Submit Filing** button when finished, or click on the **Cancel** button to return to the Manage Filing page.

CAMPAIGN FINANCE HOME HELP CONTACT Logged in as Sue Smith Log off

### Amend Filing for the One Reporting Period for the 10/17/2014 Special Election

Document to Add:  [Add New Form](#) [Upload Schedules](#)

Document Type	Detail	Donor Name	
Report of C&E	Report of Contributions and Expenditures		<a href="#">Edit</a>

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## 10 E-mail Notifications

The Campaign Finance Online System has two types of email notifications: emails automatically generated by the system and emails that users can sign up for.

### 10.1 Signing-up for Email Notifications

E-filers can sign up to receive emails when changes are made to either elections or campaigns. Logging in is not necessary to sign up for notifications. However, the user will need a valid e-mail address.

- 1) On the Home page, click on the **Sign-up for Email Notifications** button.

CAMPAIGN FINANCE HOME HELP CONTACT Register Log in

Welcome to the City of Colorado Springs Campaign Finance Application

The City of Colorado Springs requires disclosure of information relating to campaign finance. Candidates, candidate committees, issue committees, and political committees must file the disclosure statements. See City Code sections 5.2.201 through section 5.2.211 for more detailed information.

There are no limits on the amount of contributions to a candidate or committee. However, all contribution sources for candidates, candidate committees, political committees, and issue committees are required to disclose periodically a "Report of Contributions and Expenditures."

The threshold that triggers the requirement to file is very low. Once a candidate or a committee has expenditures OR receipts of \$20 dollars or more during the election cycle, reporting is required for ALL reporting periods. Later reporting periods may not have any expenditures or receipts, but reporting is still required. The threshold for issue committees is higher at \$200. Once reporting is required, candidates and committees must report all contributions and expenditures. Contributions and expenditures of \$20 or greater must be itemized. Specific information about each contributor must be reported. Loans must also be reported.

If you are not sure whether a contribution must be reported, it is advisable to report it. There is no harm in over reporting.

Current election information is available at <http://coloradosprings.gov/election/>

Public/Media

Sign-up for Email Notifications

Reports and Data

Search Filings and Download Filing Data

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- 2) Select the election you want to receive notifications about from the dropdown list and enter your email address. Check the boxes for the notifications you wish to receive. Click on the **Update Notifications** button.

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Manage Email Notifications

To sign up for notifications enter your email address and check the notifications you wish to receive.

To unsubscribe from notifications just enter your email address and clear any notification you do not want to receive.

Election 01/01/2014 Special

Email Address

Notifications To Add

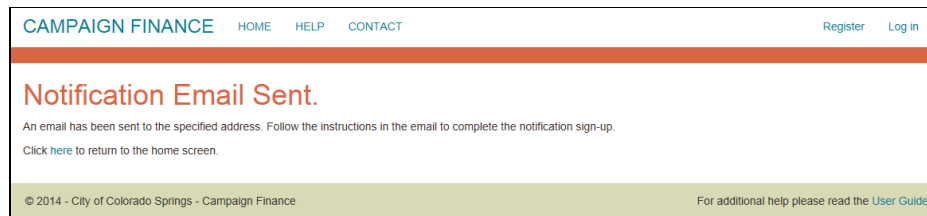
Campaign Details have Updated

Election Details have Updated

Update Notifications Cancel

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- 3) You will receive an email with a verification link, at the address provided.



- 4) Campaign Detail notifications include:
  - Any changes made to the campaign addresses, website, email, phone or financial institution
  - When a campaign has filed a new or amended electronic filing
  - When the City Clerk's Office has posted a paper filing for a campaign
- 5) Election Detail notifications include:
  - New campaigns added to an election

## ***10.2 Automatic Email Notifications***

E-mail notifications are automatically generated and sent to an E-filer under several circumstances:

- When a election filing period starts
- When it is the last day of the filing period
- When a filing is considered late

# **11 Search Filings and Download Filing Data**

Past filings can be searched using a number of different parameters. It is not necessary to register in the system to perform searches.

## ***11.1 Search and Download***

- 1) On the Home page, click on the **Search Filings and Download Filing Data** button.

A screenshot of the "CAMPAIGN FINANCE" application's welcome page. The page has a header with "CAMPAIGN FINANCE" and navigation links for "HOME", "HELP", and "CONTACT". On the right, there are "Register" and "Log in" links. The main content area is titled "Welcome to the City of Colorado Springs Campaign Finance Application" and contains several paragraphs of text explaining the reporting requirements. Below the text, there is a "Public/Media" section with a "Sign-up for Email Notifications" button. A "Reports and Data" section contains a "Search Filings and Download Filing Data" button, which is highlighted with a black arrow. The footer includes the copyright notice "© 2014 - City of Colorado Springs - Campaign Finance" and a link to the "User Guide".

- 2) On the Reports and Data page, select at least one item to search for. The search can be narrowed by selecting more than one item. Then click on the **Search** button.

A screenshot of the "Reports and Data" search page. The page has a header with "CAMPAIGN FINANCE [TEST]" and navigation links for "HOME", "HELP", and "CONTACT". On the right, there are "Register" and "Log in" links. The main content area is titled "Reports and Data" and contains a prompt "Select at least one item to search for." Below this, there are four dropdown menus labeled "Election", "Candidate", "Committee", and "Ballot Item/Race". The "Election" dropdown is currently set to "10/17/2014 Special". Below the dropdowns is a "Search" button. The footer includes the copyright notice "© 2014 - City of Colorado Springs - Campaign Finance" and a link to the "User Guide".

- 3) In the example below, some filings are shown with a checkbox to the left. Those are the filings for which there is electronic data to download (i.e. Schedule A-1, Schedule A-2 or Schedule B). Those without are either filings submitted on paper or electronic filings without a Schedule A-1, A-2 or B.



CAMPAIGN FINANCE HOME HELP CONTACT Register Log in

### Reports and Data

Select at least one item to search for.

Election

Candidate

Committee

Ballot Item/Race

<input type="checkbox"/>	Candidate/Committee	Election	Ballot Item/Race	Reporting Period	Filing Type	Filing Status	Beginning Amount	Ending Amount	<a href="#">View Filing</a>
<input type="checkbox"/>	Green Lantern	10/17/2014 Special	city clerk Race	One	Regular	Submitted	\$5,000.00	\$7,600.00	<a href="#">View Filing</a>
<input type="checkbox"/>	Green Lantern	10/17/2014 Special	city clerk Race	Two	Final	Submitted	\$7,600.00	\$0.00	<a href="#">View Filing</a>
<input type="checkbox"/>	Green Lantern	10/17/2014 Special	city clerk Race	One	Amended	Submitted	\$7,283.46	\$7,283.46	<a href="#">View Filing</a>
<input type="checkbox"/>	Peter Parker	10/17/2014 Special	city clerk Race	One	Amended	Submitted	\$0.00	\$3,003.00	<a href="#">View Filing</a>
<input type="checkbox"/>	Peter Parker	10/17/2014 Special	city clerk Race	Two	Amended	Submitted	\$3,003.00	\$2,585.00	<a href="#">View Filing</a>

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- 4) To download the filing data, check the boxes next to the line item you want, and click on the Download Data button. You will be prompted to either open or save the file. Contents are downloaded to an Excel spreadsheet, without column headings, in the order listed in the above sections for the specific Schedule uploads. Note that only Schedules A-1, A-2 and B can be uploaded or downloaded.

For example, if the filing contains a Schedule A-1, the download will look like the following:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Schedule A-1: Itemized Contributions Statement (\$20 or More)											
2	J. Jonah	Jameson	3550 Colorado Ave	Denver	CO	80114	credit	Daily Bugle	Chief Editor	8/20/2014	700	500
3												
4												

Note that the Schedule A-1 columns are arranged in the following order:

- First name
- Last name (or company name)
- Address
- City
- State
- Zip code
- Description
- Employer



- Occupation
- Date accepted
- Aggregate amount this election cycle
- Contribution amount this reporting period

If the filing contains a Schedule A-2, the download will look like the following:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Schedule A-2: Statement of Non-Monetary Contributions											
2		CSI Logic.	2014 E Omaha Rd	Colorado Springs	CO	80908	Campaign website.			10/24/2014	150	50
3												

Note that the Schedule A-2 columns are arranged in the following order:

- First name
- Last name (or company name)
- Address
- City
- State
- Zip code
- Description
- Employer
- Occupation
- Date provided
- Aggregate amount
- Fair Market Value

	A	B	C	D	E	F	G	H	I	J	
1	Schedule B: Itemized Expenditures Statement (\$20 or More)										
2		Rocky Mountain Promotions	308 N. Tejon	Colorado Springs	CO	80903	campaign advertising	9/19/2014	11218	FALSE	
3											
4											

If the filing contains a Schedule B – Itemized expenditures Statement (\$20 or more), the columns are arranged in the following order:

- First name
- Last name (or company name)
- Address
- City
- State
- Zip code
- Purpose of Expenditure
- (blank column needed here for spacing)





- (blank column needed here for spacing)
- Date Expended
- Amount
- Charitable Contribution Indicator (true or false value will appear)

The download file may be saved for future reference. When you close the file, you will return to the Reports and Data page.

## 11.2 View Campaign Information

- 1) After performing a search for filing records, click on the name of the candidate or committee to view the campaign information.

Candidate/Committee	Election	Ballot Item/Race	Reporting Period	Filing Type	Filing Status	Beginning Amount	Ending Amount	
George Lucas	10/17/2014 Special	At-Large Council Race	One	Regular	Submitted	\$5,000.00	\$7,600.00	<a href="#">View Filing</a>
George Lucas	10/17/2014 Special	At-Large Council Race	Two	Final	Submitted	\$7,600.00	\$0.00	<a href="#">View Filing</a>
George Lucas	10/17/2014 Special	At-Large Council Race	One	Amended	Submitted	\$7,283.46	\$7,283.46	<a href="#">View Filing</a>
<input type="checkbox"/> Peter Parker	10/17/2014 Special	At-Large Council Race	One	Amended	Submitted	\$0.00	\$3,003.00	<a href="#">View Filing</a>
<input type="checkbox"/> Peter Parker	10/17/2014 Special	At-Large Council Race	Two	Amended	Submitted	\$3,003.00	\$2,585.00	<a href="#">View Filing</a>

- 2) You will be taken to the Campaign Information page, which is view-only.



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### Campaign Information

<b>Election</b>	10/17/2014 Special
<b>Type</b>	Candidate
<b>Name</b>	George Lucas
<b>Race/Ballot Item</b>	At-Large Council

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#### Addresses

**Campaign Address**  
Skywalker Ranch Rd  
Nicasio, CA, 94946

**Mailing Address**  
PO Box C3P0  
Novato, CA, 94948

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#### Contact Information

<b>Campaign Web Site Address</b>	<a href="http://http://lucasflim.com/skywalker-ranch">http://http://lucasflim.com/skywalker-ranch</a>
<b>Campaign Contact Email</b>	<a href="mailto:george@lucasflim.com">george@lucasflim.com</a>
<b>Campaign Contact Phone</b>	719-385-5113

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#### Financial Institution Address

**Mountain View Bank**  
24 S Weber St  
Colorado Springs, CO, 80903

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