



Campaign Finance System Filer Guide

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Create an Account

Every person who uses the MapLight Campaign Finance System app on behalf of a campaign committee needs an account. From the public dashboard, you can create an account by clicking on Log In and then **Register** or by clicking **Create Account** from the log in screen. Enter your individual contact information and click **Next**. Enter your email address for your username and set a unique, strong password and click **Next**. Passwords are required to include an uppercase letter, a lower-case letter, a number, and a special character.

***Note:** Current city employees will not need to create an account. Use your current system credentials to log in as an administrator or Ethics filer without creating a new account.*

Choose My Filer Type

When you register for an account, select the filer type that describes why you are using the Campaign Finance System. After selecting the filer type, choose whether to register a new filer (e.g. committee) or request to join an existing filer. If more than one filer type applies to you, choose the role that is the best fit – you can register or join additional filers later.

Are you logging on as a...

- Candidate**
Citizen running for office in the City of Denver
- Committee Treasurer or Other Committee Member**
Files campaign finance reports on behalf of any committee
- Independent Expenditure Filer**
Files campaign finance reports for spending independent of candidate committees
- Lobbyist**
Files report disclosures of lobbying activities
- Covered Official or Former City Employee** [?]
Files reports of financial, gift, and city item disclosures

Figure 1 Choose User Type

I am a...	I need to...
Candidate. I'm running for office in the City of Denver.	File reports about my campaign finance contributions and transactions.
Committee Treasurer or Other Committee Member.	File reports about campaign finance for any form of committee.
Independent Expenditure Filer.	File reports about spending to influence an election that is independent of a candidate's committee.
Lobbyist. I represent a lobbying firm.	File reports that disclose lobbying activity.
Covered Official or Former City Employee. I am an elected official, appointed official, or former city employee.	File reports about finances, gifts, and city item disclosures.

Join a Filer

Join a Committee

When you register for an account as a Candidate, Committee Treasurer, or Committee Member, you can choose to join an existing committee. You can also [create a new political committee](#).

Click **Search for one or more committees that you are affiliated with**. Enter the name or part of the name in the search box. When you find your committee, select it from the list. You can select one or more committees to join. Click **Next**.

Search for one or more committees that you are affiliated with

Q denver **SEARCH**

- Moving Denver Forward
- Denver County Republican Central Committee PAC
- Denver Fire Fighters PAC
- Local 720 Denver Political Committee
- Tom Downey for Denver

Figure 2 Joining an Existing Committee

Once selected, confirm your personal information and committee selections, and click **Submit**. The committee treasurer will be notified of your request to be added to each committee.

Once your account is created, you can log in. Until your request to join a committee has been approved, you only have access to your account information, help pages, and the Switch Committee menu which allows you to register or join other filers.

Join an Independent Expenditure Filer

When you register for an account as an Independent Expenditure (IE) filer, you can choose to join one or more existing IE filers. You can also [register a new IE filer](#).

To join an existing IE filer, click **Select your Independent Expenditure entity** to search for an existing filer. Enter the name or part of the name of your IE filer organization or individual IE filer in the search box. When you find your filer, select it from the list. Click **Next**.

Select your Independent Expenditure(s)

Q Search Independent Expenditure **SEARCH**

Register a new Independent Expenditure entity

Figure 3 Joining an Existing Independent Expenditure Filer

Once selected, confirm your personal information and committee selections, and click **Submit**. The primary user for the Independent Expenditure filer will be notified of your request to be added.

Once your account is created, you can log in. Until your request to join a filer has been approved, you only have access to your account information, help pages, and the Switch Committee menu which allows you to register or join other filers.

Join a Lobbyist

When you register for an account as a Lobbyist, you can choose to join an existing lobbying entity. You can also [register a new lobbying entity](#).

To join an existing lobbying entity, click **Select your lobbying entity** to search for an existing filer. Enter the name or part of the name of your lobbying organization or individual lobbyist, and then click **Search**. When you find your lobbyist, select it from the list.

Note: *You can join more than one lobbying entity.*

Register a New Filer

Register a New Political Committee

When you register for an account as a Candidate or Committee Treasurer, you can create a new committee.

If you want to create a new committee, click **Register a new committee**.

On the Committee Registration pages, enter information specific to the committee. Give your committee a unique name and select the correct committee type: candidate committee, issue committee, or another committee type. If you selected Candidate as your filer type, the committee type is set to candidate committee.

Committee Registration

1. COMMITTEE INFORMATION 2. CONTACT INFORMATION 3. ADD OFFICERS 4. BANK INFORMATION

Committee Information

Committee Name Committee name is required

Committee Type

Office Sought

Election Date

Candidate Information

First Name

Last Name

Description

Address 1

Figure 4 Committee Registration

Candidate Committees

If you are creating a new candidate committee, enter the following information.

Committee Name	Choose a unique name for the committee.
Committee Type	Select "Candidate."
Office Sought	Select the office.
District	Select the Candidate's district (if applicable).
Election Date	Select the date of the election.

Candidate Information

Enter contact information for the candidate. If you selected Candidate as your filer type, this is pre-filled with your user information. If you are the Treasurer, this information will be used to invite the Candidate to create their own account and work on the committee.

First Name	Enter the first name of the Candidate.
Last Name	Enter the last name of the Candidate.
Address 1	Enter the Candidate's address.
Address 2	Enter additional information about the Candidate's address, such as a suite number.
City	Enter the Candidate's city.
State	Enter the Candidate's state.
Zip Code	Enter the Candidate's zip code.
Phone	Enter the Candidate's phone number.

Email	Enter the Candidate's email address.
-------	--------------------------------------

Issue Committees

If you are creating a new issue committee, enter the following information.

Committee Information

Committee Name

Committee Type

Ballot Issue [?]

Election Date

Position

Purpose

[Next](#)

Figure 5 Registering an Issue Committee

Committee Name	Choose a unique name for the committee.
Committee Type	Select "Issue Committee."
Ballot Issue	Enter the name or a description of the ballot issue.
Election Date	Select the date of the election.
Position	Select "Support" or "Oppose."
Purpose	Describe the purpose of the committee.

Other Committee Types

If you are creating a new committee for a campaign, with any committee type other than candidate or issue committee, enter the following information.

Committee Information

Committee Name

Committee Type

Purpose

Next

Figure 6 Registering a Committee of Another Type

Committee Name	Choose a unique name for the committee.
Committee Type	Select the appropriate committee type.
Purpose	Describe the purpose of the committee.

Committee Contact Information

In the **Next** page, enter in contact information for the committee.

Address 1	Enter the committee's address.
Address 2	Enter additional information about the committee's address, such as a suite number.
City	Enter the committee's city.
State	Enter the committee's state.
Zip Code	Enter the committee's zip code.
Campaign Phone	Enter the campaign committee's phone number.
Campaign Email	Enter the campaign committee's email address.
Alternate Phone	Enter the committee's alternate phone number (optional).
Alternate Email	Enter the committee's alternate email address (optional).
Committee Website	Enter the committee's website address (optional).

Click **Next**.

Add Officers

You can add one or more officers to the committee by entering the person's contact information and clicking **Add Officer**. Officers are invited to work on behalf of the committee in the Campaign Finance System.

New Tomorrow PAC Committee Registration

1. COMMITTEE INFORMATION 2. CONTACT INFORMATION 3. ADD OFFICERS 4. BANK INFORMATION

Current Officers





	First Name	Last Name	Officer Type	Description	Action
+	Sam	Johnson	Treasurer		 
+	Lucy	Stone	Officer		 

Figure 7 Committee Registration, Add Officers

To add a new officer, enter information for that individual.

First Name	Enter the officer's first name.
Last Name	Enter the officer's last name.
Officer Type	Select Officer, Treasurer, or (for candidate committees) Candidate.
Address 1	Enter the officer's address.
Address 2	Enter additional information about the officer's address, such as an apartment number (optional).
City	Enter the officer's city.
State	Enter the officer's state.
Zip Code	Enter the officer's zip code.
Email	Enter the officer's email address.
Phone	Enter the officer's phone number.

Click **Save** to add the officer to the committee. Once you have added all the officers to the committee, click **Next**.

Bank Information

Note: You can skip this page and submit bank information later if you aren't ready to enter it yet.

Bank Name	Enter the name of the committee's bank.
Address 1	Enter the bank's address.
Address 2	Enter additional information about the bank's address, such as a suite number.
City	Enter the bank's city.
State	Enter the bank's state.
Zip Code	Enter the bank's zip code.

After submitting the registration, you can log in to the Campaign Finance System. On the committee registration confirmation page, download and print the Treasurer Document and Candidate Affidavit.


Follow the instructions in these documents and file them with the City of Denver Office of the Clerk and Recorder.

Register a New Independent Expenditure Filer

When you register for an account as an Independent Expenditure (IE) filer, you can create a new IE filer. Click **Register a new Independent Expenditure entity**.

Independent Expenditure Information

Independent Expenditure Type: Individual

Name: 
Name is required.

Occupation:

Employer:

Figure 8 Independent Expenditure Registration

Additional Information

Independent Expenditure Type	Select Individual or Organization.
Name	If the Filer Type is Individual, your user name will be pre-populated. If the filer type is organization, enter the name of your organization.
Occupation	If the Filer Type is Individual, enter your occupation or title.
Employer	If the Filer Type is Individual, enter the name of your employer.

Click **Next**. Confirm your information and click **Submit**.

Register a New Lobbying Entity

To register a new lobbying entity, click **Register a new lobbying entity**. You will be prompted to enter information about the entity, including contact information, employees (for organizations), clients, and relationships.

Lobbyist Information

Lobbyist Type

Name

Year

Business Address 1

Business Address 2

City

State

Zip Code

Phone

Email

Legislative Matters

Figure 9 Lobbyist Information Form

Lobbyist Information

Lobbyist Type	Select Individual or Organization.
Name	If the lobbyist type is Organization, enter the name of the lobbying firm. If the lobbyist type is Individual, this will be auto-populated with the user's name.
Year	The year you are registering to lobby in. Defaults to the current year.
Business Address 1	Enter the lobbyist's address.
Business Address 2	Enter additional information about the lobbyist's address, such as a suite number.

City	Enter the lobbyist's city.
State	Enter the lobbyist's state.
Zip Code	Enter the lobbyist's zip code.
Phone	Enter the lobbyist's phone number.
Email	Enter the lobbyist's email address.
Legislative Matters	Enter the types of industries or general topics being lobbied.

Click **Next**.

Employees



If the lobbyist is an organization or lobbying firm, review the list of employees or add new employees. The first row will be prepopulated with the name and contact information of the person completing the registration. Click the pencil icon to edit an employee or the trash icon to delete the employee.

First Name	The first name of the lobbyist employee.
Last Name	The last name of the lobbyist employee.
Phone	Phone number of the lobbyist's employee.
Email	Email address of the lobbyist's employee.

You can add one or more employees by completing the person's contact information in the form. Click **Save Employee** to add the employee to the lobbying registration.

Employees

List all employees that lobby with the City of Denver. These employees can also register as individual users of this system to gain direct access to filing.

First Name	Last Name	Phone	Email	Action
William	James	(457) 847-8468	james@yopmail.com	
Thomas	Kuhn	(239) 888-2928	kuhn@yopmail.com	 

Add New Employee

First Name

Last Name

Phone

Email

Figure 10 Employees on a Lobbyist Registration

Clients



Lobbyists must list at least one client (i.e., a company that has hired the lobbyist). Click the pencil icon to edit a client or the trash icon to delete the client.

Company Name	Indicates the name of the client company.
Lobbyist	Indicates the name of the lobbyist, who may be the individual lobbyist themselves or an employee of the lobbying firm.
Nature of Business	Indicates the type of business the client engages in.
Address 1	Indicates the client's address.
Address 2	Indicates additional information about the client's address, such as a suite number.
City	Indicates the client's city.
State	Indicates the client's state.
Zip Code	Indicates the client's zip code.

You can add one or more clients by completing the client's contact information in the form. Click **Save Client** to add the client to the lobbying registration.

Clients

List all clients you represent and on whose behalf you lobby the City of Denver.

	Company Name	Lobbyist	Nature Of Business	Action
+	Dewey, Cheatham & Howe	William James	Law Firm	 

Add New Client

Company Name

Lobbyist

Nature of Business

Address 1

Address 2

City

State

Zip

Figure 11 Clients on a Lobbyist Registration

Relationships

A lobbyist must disclose any and all relationships that may create a potential conflict of interest. Review the list of relationships or add a new relationship. Click the pencil icon to edit a relationship or the trash icon to delete the relationship.

Lobbyist	Indicates the name of the lobbyist with a relationship to disclose.
Official Name	Indicates the name of the city official related to the lobbyist.
Official Title	Indicates the title of the city official related to the lobbyist.
Relationship	Indicates the relationship between the lobbyist and city official (such as “business partner”).
Entity Name	Indicates the entity name that represents the relationship.

To add a new relationship, complete the form. Click **Save Relationship**. Once you have added all relationships of the lobbyist, click **Next**.

Create Signature

The primary registered lobbyist must sign the registration. Draw a signature or upload a signature image. Click **Submit**.

[Register as a New Covered Official or Former City Employee](#)

Ethics features are coming soon to the Denver Campaign Finance System.

Manage Multiple Filers

Sometimes, a person using the app may be affiliated with more than one filer or with filers of different filer types.

- A person may serve as a treasurer or officer for more than one committee.
- A person may be associated with more than one IE filer.
- A person may be associated with more than one lobbyist.
- A person may be affiliated with committees and IE filers and lobbyists.

Switch Committees

To switch between affiliated filers, log in to your account. Click your profile name in the upper right and click **Switch Committee**.

On the left-hand side, your affiliated committees or filers appear in a list. Select one of your filers and its filer information is displayed on the right-hand side. If you do not see the filer you want to view in the list, click **View Other Filers** to expand your list of associated filers. When you have selected the filer that you want to work on, click **Continue**.

Committee

- Carson for Council
- McGinnis for City Council

Register or Join

New Committee	Join a Committee
New Independent Spender	Join an Independent Spender

Current Selection

Committee Name	Carson for Council
Committee ID	726
Committee Type	Candidate Committee
Candidate Name	Barry Carson
Treasurer Name	Barry Carson
Office	City Council At-Large
Election Date	03/08/2022
Public Funding Status	Not Participating

Continue

Figure 12 Switch Committees

Register or Join Another Filer

On the Switch Committee view you can also register a new committee or other filer. On the left-hand side, below the list of current filers, there are buttons to register or join different types of filers.

See also [Register a new political committee](#), [Register a new independent expenditure filer](#), [Register a new lobbying entity](#), [Join a committee](#), [Join an independent expenditure filer](#), or [Join a Lobbyist](#).

Messages and Notifications

Filers have an inbox to receive messages and notifications. City staff may send automatic notifications to filers, such as filing deadline reminders. Filers can send a message directly to administrators to communicate about their filings.

View Messages

To view your messages, log in to your account and select **Notifications** from the left-hand menu. Any messages or notifications you've received appear in your active message list with the most recent message at the top. Click a message to view it. Click on the message in the message list a second time to un-select the message.

The active message appears on the right side. Any message responses will appear after the message, with the most recent at the bottom of the thread.

McGinnis for City Council Messages

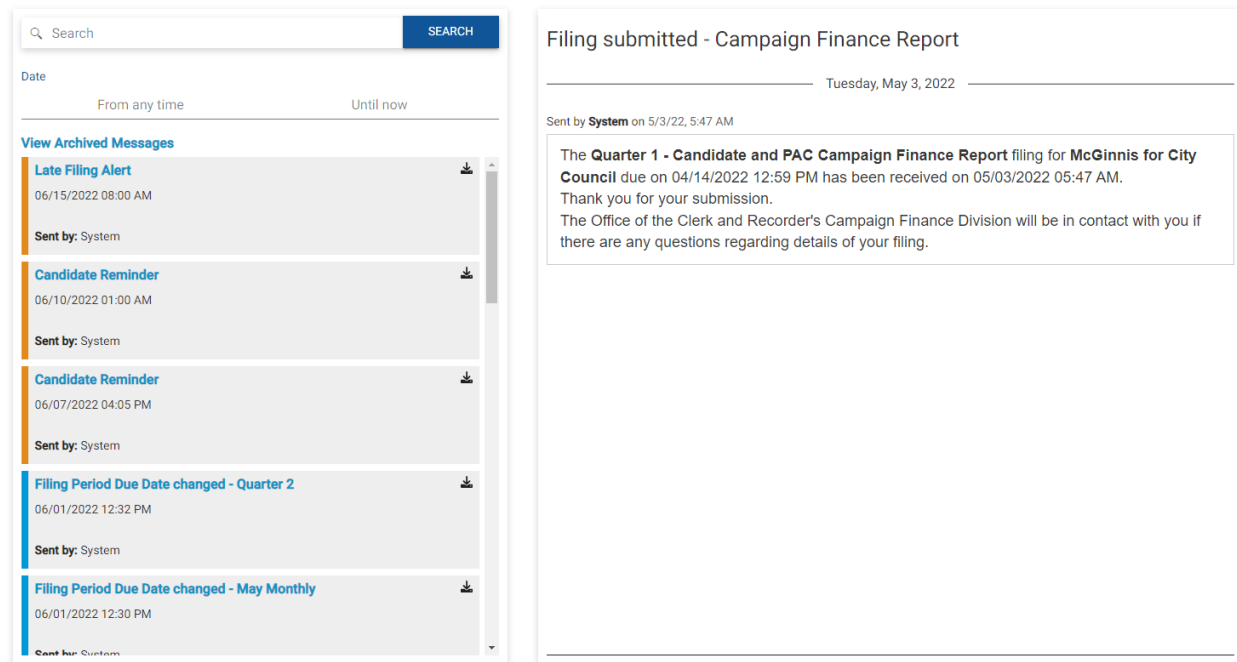


Figure 13 Messages Inbox with a Sample Message Selected

Create a New Message

To send a new message to city staff, click **New Message**. Note that you cannot create a new message while an existing message is selected.

Enter the subject of the message, and then write your message. To attach a file, click the icon and choose your file to attach. Click **Send**.

Reply to a Message

To reply to a message, click a message to view it. Click **Add Reply**. Write your message. To attach a file, click the icon and choose your file to attach. Click **Send**.

Archive a Message

To archive a message and remove it from your active message list, click the archive icon in the top right corner of the message in the list. You can access archived messages by clicking **View Archived Messages**.

Search Messages

To search for a message by text in the subject or body of the message, enter a word or phrase in the search box. Click **Search**. To narrow the search, select a start date and/or end date.

Fines and Fees

Filers can view outstanding fines, fees, penalties, and their payment history. To see this information, log in to your account and select **Fines and Fees** from the left-hand menu.

- **Fine**— A fine for a late filing. Assessed when a filer fails to submit a filing by the due date.
- **Fee**— A standard fee assessed to all filers of a given type.
- **Penalty**—Assessed when a filer commits an infraction against filing rules or regulations.

Fine and Fees

Outstanding Fees

Invoice ...	Type	Descript...	Status	Amount	Remaini...	View Inv...
5566	Fee	Registration fee	Outstanding	\$50.00	\$50.00	View
5565	Fine	Late report fine	Outstanding	\$100.00	\$100.00	View

1 - 2 of 2 items

Figure 14 Fines, Fees, and Penalties on a Committee

Outstanding Fees

This section shows all unpaid fees, fines, or penalties with any balance for a filer.

Invoice Number	Indicates the invoice number of the fine, fee, or penalty.
Type	Indicates the type of invoice (i.e., Fine, Fee, or Penalty.)
Description	Describes the fine, fee, or penalty.
Status	Indicates the status of the fine, fee, or penalty.
Amount	Indicates the total amount of the fine, fee, or penalty.
Remaining Balance	Indicates the unpaid balance of the fine, fee, or penalty.
View Invoice	Click View to view the invoice for this fine, fee, or penalty.

Make a Payment

To pay a fine, fee, or penalty, click **Pay Fees**. A new tab will open for the payment system.

Request a Fee Waiver

To request a reduction or waiver of fees, click **Contact Us** to contact the Administrators.

Payment History

This section shows completed payments.

Payment History

Invoice ...	Type	Descript...	Date	Amount	User	Paymen...
5566	Fee	Registration fee	01/19/2022	\$10.00	Sam Jones	Credit/Debit
5565	Fine	Late report fine	01/16/2022	\$50.00	Sam Jones	Check

1 - 2 of 2 items

Figure 15 Payment History for a Committee

Invoice Number	Indicates the invoice number of the fine, fee, or penalty.
Type	Indicates the type of invoice (i.e., Fine, Fee, or Penalty.)
Description	Describes the fine, fee, or penalty.
Date	Indicates the date of the payment towards the fine, fee, or penalty.
Amount	Indicates the total amount of the payment.
User	Indicates the person who made the payment.
Payment Method	Indicates the method of payment.

Calendar

The calendar displays election-related dates, events, and activities, such as filing deadlines. When logged in, you see important dates for your specific filer type. To view your filing calendar, log in to your account and select **Calendar** from the left-hand menu.

Download My Calendar

To download your filing calendar into your own calendar app, click **Download Calendar**. You can import the .ics file to your own calendar app.

Help & FAQ

To access the Help page in the app, click **Help** in the upper right next to your profile name or Log In button.

Choose from several options for help:

- **FAQs**—Frequently asked questions about filing tasks.
- **Laws and Rules**—Links to official laws for campaign finance, lobbying, and ethics reporting.
- **User Manual**—Links to PDF documents that describe all pages and functionality of the app for filers.
- **Contact Us**—Displays contact information for the city offices, including a phone number to call, location, and hours.

To send a message to the administrators, complete the form. Click **Send**.

Full Name	Enter your full name.
Email Address	Enter your email address.
Committee Name	Enter the name of your committee.
Issue Category	Select a category that best describes the issue you need help with.
Subject	Enter a brief subject for your message.
Message	Enter your message to administrators.

Committees

Amend a Committee Registration

The treasurer or candidate of a committee can submit an amendment to the committee’s registration on the **Committee Information** page. Below the committee information summary, click **Committee Information** to view the current registration. At the bottom of the page, click **Edit**. Make any changes needed in the registration form and click **Submit**.

Manage Users



Only a primary user (treasurer or candidate) of a committee can view, change, and add users to the committee.

If you are the treasurer, log in to your account and select **Committee Information** from the left-hand menu. Below the committee details, click **Manage Users**. A list of current committee members appears in a grid.

McGinnis for City Council

Manage Users

Current Users

Role	First Name	Last Name	Username (E-mail)	Actions
Invited				
Officer	Anna	Brewster		Make Treasurer 
Officer	Barry	Carson		Make Treasurer 
Treasurer	Terry	McGinnis		

1 - 4 of 4 items

Figure 16 Current Users

Current Users

Role	Indicates the type of role the user holds on the filing committee.
First Name	Indicates the user’s first name.
Last Name	Indicates the user’s last name.
Username (Email)	Indicates the user’s email address, which serves as the username.

Action	Includes options to make the user a treasurer or delete the user from the committee.
--------	--

Select a User as Treasurer

Every committee must have a treasurer. If you are the treasurer or candidate, you can assign the role of treasurer to another user. To make another user the treasurer, click **Make Treasurer** in the Action column. The system sends an email to the selected user, giving them the option to accept or deny the role of treasurer before the invitation expires. If they accept, they become the treasurer and the former treasurer will become a regular officer of the committee.

Remove a User

If you are the primary user, you can remove a user from a committee. To delete a user from a committee, click the trash can icon. The user will be removed from the committee and will no longer be able to view or interact with committee information in the system.

Add a User

If you are the primary user, you can add a user to a committee. To invite another person to join the committee, scroll to **Add User** on the Manage Users page, enter their email address, and click **Send**. The invited user will receive an email inviting them to join the committee. Once they create an account, they will be automatically added as an officer with your committee.

Add User

To invite a new user to access your committee, invite them via email using the box below

The screenshot shows a light gray input field containing the text 'invite@email.com' and a gray button labeled 'SEND' to its right.

Figure 17 Add a User to Your Committee

Approve or Deny Affiliation Requests

If you are the primary user, you can approve or deny requests to join the committee. The Affiliation Request list shows users who have requested access to the committee.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Displays a note the user wrote to request access to the committee.
Action	Includes options to confirm (a check mark) or deny (an x) access to the committee.

If you approve the request, the user will be added to the current users list for the filer. If you deny the request, the user will be moved to the rejected users list and will not have access to the filer's information. The user will be notified by email of either action.

Rejected Requests

The table shows users who have previously requested access to the committee but have been rejected.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Shows the note the user wrote to request access to the committee.

Record Transactions

Committees enter and record campaign finance transactions, including contributions, expenditures, loans, and unpaid obligations. These transactions are included on campaign finance reports.

To record a transaction, log in to your account and select **Filings** from the left-hand menu. From the Filings page, select **Transactions**.

Choose the appropriate transaction type.

Contribution	A contribution to a committee.
Expenditure	An expense incurred and paid by a committee.
Unpaid obligation	An expense that has not yet been paid.
Loan	A loan taken by a committee.

Record a Contribution

On the left-hand side, report the contributor's contact information. Search for an existing contact or enter in the information for a new contributor. To search for an existing contributor, enter the organization or the individual's name in the Search field. Select a contact from the list of matching names.

Transaction Type
Contribution

Contributor SEARCH

Contributor Type Individual

First Name

Last Name

Employer

Occupation

Address 1

Address 2

City

State

Zip Code

Contribution Type Monetary

Monetary Type
Monetary type is required

Date Received

Contribution Amount

Election Cycle 2023 Municipal General Election

Upload Receipts Select files... Drop files here to uplo...

Refund

Notes

Figure 18 Transaction Entry Form for Contributions

Individual

First Name	Enter the contributor’s first name.
Last Name	Enter the contributor’s last name.
Employer	Enter the contributor’s employer.
Occupation	Enter the contributor’s occupation.
Address 1	Enter the contributor’s address.
Address 2	Enter additional information about the contributor’s address, such as a suite number.
City	Enter the contributor’s city.
State	Enter the contributor’s state.
Zip Code	Enter the contributor’s zip code.

Organization

Organization Name	Enter the contributor’s name.
Address 1	Enter the contributor’s address.
Address 2	Enter additional information about the contributor’s address, such as a suite number.

City	Enter the contributor's city.
State	Enter the contributor's state.
Zip Code	Enter the contributor's zip code.

Committee

Committee Name	Enter the committee's name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee's address.
Address 2	An auto-populated field containing the committee's additional address information.
City	An auto-populated field containing the committee's city.
State	An auto-populated field containing the committee's state.
Zip Code	An auto-populated field containing the committee's zip code.

On the right-hand side, enter in details about the contribution. The contribution type indicates whether the contribution was monetary or in-kind.

Monetary Type	Choose the appropriate monetary type: Cash, Check, Credit/Debit, Cryptocurrency, or Other. <i>Only applicable to Monetary contributions</i>
Date Received	Enter the date on which the campaign received the contribution.
Contribution Amount	Enter the amount of the contribution.
Election Cycle	By default, this value shows the current election cycle. Select the election cycle for which the contribution applies.
Description	Enter a brief description of the in-kind contribution. <i>Only applicable to in-kind contributions</i>

Cycle Total

When you enter a contribution, the Transaction page shows the total of all contributions from this contributor in the selected election cycle. If the amount is over the contribution limit, a warning appears to notify you.

Public Funding

If a candidate committee has submitted their intent to qualify for the Fair Elections Fund (FEF) program, a checkbox "Submit for public funding" appears for monetary contributions. If you want to submit this contribution for public funding, check this box. Click **Upload Receipt** to attach a copy of the receipt for this contribution.

Refunds

If the contribution has been refunded, click the "Refund" checkbox and enter details about the refund.

Refund

Refund Date

Refund Amount

Reason for Refund

Figure 19 Entering a Contribution with a Refund

Refund Date	Enter the date the contribution was refunded to the contributor.
Refund Amount	Enter the amount of the refunded contribution.
Reason for Refund	Enter the reason the contribution was refunded, for example, "Refunded excess contribution." (Optional)

Notes

Enter any notes about the contribution. This note is visible to filers only and won't appear on campaign finance reports. Click **Save**.

[Record an Expenditure](#)

On the left-hand side, report the payee's contact information. Search for an existing contact or enter in the information for a new payee. To search for an existing contact, enter the organization or the individual's name in the Search field. Select a contact from the list of matching names.

Transaction Type
Expenditure

Payee [?] SEARCH

Payee Type Individual

First Name

Last Name

Address 1

Address 2

City

State ▼

Zip Code

Date Paid month/day/year

Amount

Purpose [?]

Fair Election Fund Expense [?]

Upload Receipts Select files... Drop files here to uplo...

Expenditure Category ▼

Post Election Exemption [?]

Refund

Notes

Figure 20 Transaction Entry Form for Expenditures

Individual

First Name	Enter the payee's first name.
Last Name	Enter the payee's last name.
Address 1	Enter the payee's address.
Address 2	Enter additional information about the payee's address, such as a suite number.
City	Enter the payee's city.
State	Enter the payee's state.
Zip Code	Enter the payee's zip code.

Organization

Organization Name	Enter the payee's name.
Address 1	Enter the payee's address.
Address 2	Enter additional information about the payee's address, such as a suite number.
City	Enter the payee's city.
State	Enter the payee's state.
Zip Code	Enter the payee's zip code.

Committee

Committee Name	Enter the committee’s name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee’s address.
Address 2	An auto-populated field containing the committee’s additional address information.
City	An auto-populated field containing the committee’s city.
State	An auto-populated field containing the committee’s state.
Zip Code	An auto-populated field containing the committee’s zip code.

On the right-hand side, enter in details about the expenditure.

Date Paid	Enter the date of the expenditure.
Amount	Enter the amount of the expenditure.
Purpose	Enter a brief description of the expenditure’s purpose.

Fair Elections Fund – Candidate Committees Only

For candidate committees that are participating in the Fair Elections Fund program, the Fair Election Fund Expense check box identifies expenditures paid out of funds received through that program. Click **Upload Receipt** to attach a copy of the receipt for this expenditure. Choose the expenditure category that best describes the expenditure from the dropdown box.

Post-Election Exception – Candidate Committees Only

For candidate committees, the Post-Election Exception check box is available. If the expenditure was incurred after the election, check this box.

Refunds

If the expenditure has been refunded, click the “Refund” checkbox and enter details about the refund.

Refund Date	Enter the date the expenditure was refunded to the payee.
Refund Amount	Enter the amount of the refunded expenditure.

Notes

Enter any notes about the expenditure. This note is visible to filers only and won’t appear on campaign finance reports. Click **Save**.

Record an Unpaid Obligation

On the left-hand side, report the payee’s contact information. Search for an existing contact or enter in the information for a new payee. To search for an existing contact, enter the organization or the individual’s name in the Search field. Select a contact from the list of matching names.

Transaction Type
Unpaid Obligation

Payee [?] SEARCH

Contributor Type Individual

First Name

Last Name

Address 1

Address 2

City

State

Zip Code

Due Date

Amount

Purpose

Fair Election Fund Expense [?]

Upload Receipts Select files... Drop files here to uplo...

Expenditure Category

Paid

Notes [?]

Figure 21 Transaction Entry Form for Unpaid Obligations

Individual

First Name	Enter the payee’s first name.
Last Name	Enter the payee’s last name.
Address 1	Enter the payee’s address.
Address 2	Enter additional information about the payee’s address, such as a suite number.
City	Enter the payee’s city.
State	Enter the payee’s state.
Zip Code	Enter the payee’s zip code.

Organization

Organization Name	Enter the payee’s name.
Address 1	Enter the payee’s address.
Address 2	Enter additional information about the payee’s address, such as a suite number.
City	Enter the payee’s city.
State	Enter the payee’s state.
Zip Code	Enter the payee’s zip code.

Committee

Committee Name	Enter the committee’s name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee’s address.
Address 2	An auto-populated field containing the committee’s additional address information.
City	An auto-populated field containing the committee’s city.
State	An auto-populated field containing the committee’s state.
Zip Code	An auto-populated field containing the committee’s zip code.

On the right-hand side, enter details about the unpaid obligation.

Due Date	Enter the due date of the unpaid obligation.
Amount	Enter the amount due.
Purpose	Enter a brief description of unpaid obligation’s purpose.

Fair Election Fund – Candidate Committees Only

For candidate committees that are participating in the Fair Elections Fund (FEF) matching funds program, the Fair Election Fund Expense check box identifies expenditures paid out of the public funds. Click **Upload Receipt** to attach a copy of the receipt for this expenditure. Choose the expenditure category that best describes the expenditure from the dropdown box.

Paid

Once the unpaid obligation has been paid, return to this transaction and check the “Paid” box. In the **Paid Date** field, enter the date the expenditure was paid.

Notes

Enter any notes about the unpaid obligation. This note is visible to filers only and won’t appear on campaign finance reports. Click **Save**.

Record a Loan

On the left-hand side, report the lender’s contact information. Search for an existing contact or enter in the information for a new lender. To search for an existing lender, enter the organization or the individual’s name in the Search field. Select a contact from the list of matching names.

Transaction Type

Lender

Lender Type

Address 1

Address 2

City

State

Zip Code

Loan Type

Date of Loan

Amount

Name of Guarantor or Endorser

Amount Guaranteed

Interest Terms or Rate

Due Date

Balance \$0.00

Figure 22 Transaction Entry Form for Loans

Individual Lender

First Name	Enter the lender’s first name.
Last Name	Enter the lender’s last name.
Employer	Enter the lender’s employer.
Occupation	Enter the lender’s occupation.
Address 1	Enter the lender’s address.
Address 2	Enter additional information about the lender’s address, such as a suite number.
City	Enter the lender’s city.
State	Enter the lender’s state.
Zip Code	Enter the lender’s zip code.

Organization

Organization Name	Enter the lender’s name.
Address 1	Enter the lender’s address.
Address 2	Enter additional information about the lender’s address, such as a suite number.
City	Enter the lender’s city.
State	Enter the lender’s state.
Zip Code	Enter the lender’s zip code.

Committee

Committee Name	Enter the committee’s name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee’s address.
Address 2	An auto-populated field containing the committee’s additional address information.
City	An auto-populated field containing the committee’s city.
State	An auto-populated field containing the committee’s state.
Zip Code	An auto-populated field containing the committee’s zip code.

On the right-hand side, enter in details about the loan.

Loan Type	Select “Personal Loan” or “Commercial Loan.”
Date of Loan	Enter the date the loan was received.
Amount	Enter the amount received.
Name of Guarantor or Endorser	Enter the name of the guarantor or endorser.
Amount Guaranteed	Enter the amount guaranteed.
Interest Terms or Rate	Enter the interest rate as a percentage, even if it is zero.
Due Date	Enter the date the loan is due to be repaid.

Balance

The balance field displays a calculated balance that represents the total amount of the loan minus any payments or forgiveness on the principal amount.

Sub-Transactions

Payments on outstanding loans are recorded as sub-transactions on the loan. If the lender forgives the loan, enter it as a forgiveness sub-transaction. Interest paid on a loan is also reported as a sub-transaction on that loan. For each sub-transaction, select what type of transaction it was and enter in the date and amount. Click **Add** to save the sub-transaction.

Sub Transactions

Sub-Transaction Type

Date

Amount

Sub-Transaction Type	Date	Amount
Payment	01/14/2022	\$100.00

Figure 23 Adding Sub-Transactions to a Loan

Payment and Forgiveness sub-transactions decrease the total Balance of the loan, listed on the page. Interest payments are not deducted from the Balance.

Past sub-transactions are listed on the right of the screen. To edit a sub-transaction, click the pencil icon, make the appropriate changes, and click **Save**. To delete a sub-transaction, click the trash can icon.

Upload Multiple Transactions

To upload a set of more than one contribution or expenditure transactions at one time, upload a bulk file in the upload template format.

Log in to your account and select **Filings** from the left-hand menu. Click **Upload Data**.

Upload one or more transactions in an Excel or CSV file

[Upload Transactions](#)

Download a template for future transaction uploads

[Download contribution template](#)

[Download expenditure template](#)

Add a single transaction in the system

[Add a Transaction](#)

Figure 24 Options on the Upload Data Page

Click **Download contribution template** or **Download expenditure template** to download a template providing the format for uploading contributions or expenditures. This file is an Excel file that contains one tab with the required column headers and a second tab with the description of what data should be entered in each column. To successfully upload the transactions, you must list transactions according to the format in the template.

Click **Upload Transactions** and **Select Files** to select a .csv or .xlsx file of contributions or expenditures to upload. You will see a confirmation once the transactions have been successfully uploaded into the system. If the file cannot be processed, an error message will be displayed on screen, with information about how to resolve the issue. For example, the error below is the result of using an invalid value in the monetary type column.

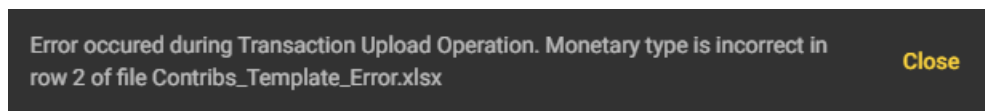


Figure 25 Sample Upload Error

When you see an error on a transaction upload, first check any specific rows mentioned in the error, and correct the data to the necessary format. If you have further issues, make sure you are using one of the two template files.

Once a transaction file is uploaded, it is recommended that you check the newly added transactions on the Search Transactions page to validate that there were no problems in the uploaded data.

File Campaign Finance Reports

Filers can view filed reports, amend filed reports, and create new reports. To view or file campaign finance reports, log in to your account and select **Filings** from the left-hand menu. Select **Campaign Finance Report**.

The Campaign Finance Report consists of a few different sections. Filing Information contains information about the committee and the specific report. The Summary displays the total for the filing period for each type of transaction.

**Cook for Auditor
 Campaign Finance Report**

Current Draft		Existing Reports	
Filing Information		Summary	
Committee ID	729	Opening Balance	\$0.00
Committee Name	Cook for Auditor	Total Monetary Contributions	\$235.00
Committee Type	Candidate Committee	Total In-Kind Contributions	\$77.00
Office Sought	Auditor	Total Refunds	\$0.00
Election Cycle		Total Expenditures	\$450.00
Sample City Council Election		Total New Loans	\$0.00
Filing Period:		Total Loan Balance	\$0.00
December Monthly		Closing Balance	\$235.00

Figure 26 Campaign Finance Report, Filing Information and Summary

If applicable, the FEF Summary displays information about Fair Election Fund qualifying contributions. Below these sections, there are lists of transactions in the filing period, grouped by transaction type. A transaction type name is only shown when there are related records on the filing.

Monetary Contributions >

Unitemized Total: \$0.00

Date	Amount	Contributor Name	Contributor Type	View Receipt	Actions
12/10/21	\$105.00	Streamline Design	Organization		
12/20/21	\$55.00	Richard Pointer	Individual		
12/15/21	\$75.00	Haley Fredricks	Individual		

1 - 3 of 3 items

In-Kind Contributions >

Expenditures >

SUBMIT

Figure 27 Campaign Finance Report Transactions

Click the transaction type to show the related transactions, and the unitemized total if applicable. Click to expand a transaction to see more details. A warning icon appears next to any section if any of the related transactions have a warning, such as a contribution limit warning.

Monetary Contributions ² >

Unitemized Total: \$15.15

Date	Amount	Contributor Name	Contributor Type	View Receipt	Actions
- 12/10/21	\$105.00	Streamline Design	Organization		
Address 1	Address 2	City	State	Zip	Cycle to Date Total
300 M St		Denver	CO	89565	\$210.00
Total contributions in this cycle are over the \$200.00 contribution limit.					
+ 12/13/21	\$75.34	Jane Smith	Individual		
+ 12/9/21	\$105.00	Streamline Design	Organization		

1 - 3 of 3 items

Figure 28 Contribution Limit Warning on a Campaign Finance Report

On the **Current Draft** tab, you can review and submit a draft campaign finance report. Select the appropriate Election Cycle and Filing Period to view the related draft. Carefully review the transactions below. If needed, you can click the pencil icon to edit a transaction.

If you need to change or modify a filed report, see [File an amendment](#).

File a Statement of No Activity

If there are no transactions for the filing period, you can file a Statement of No Activity.

Note: There may be values in the beginning and ending balances, as well as in the loan balance.

Cook for Auditor Campaign Finance Report

Current Draft Existing Reports

Filing Information

Committee ID	729
Committee Name	Cook for Auditor
Committee Type	Candidate Committee
Office Sought	Auditor

Election Cycle

Sample City Council Election

Filing Period:

November Monthly

I certify that I did not receive any contributions and have not made any expenditures during this filing period.

Summary

Opening Balance	\$0.00
Total Monetary Contributions	\$0.00
Total In-Kind Contributions	\$0.00
Total Refunds	\$0.00
Total Expenditures	\$0.00
Total New Loans	\$0.00
Total Loan Balance	\$0.00
Closing Balance	\$0.00

Cancel **File Statement Of No Activity**

Figure 29 Statement of No Activity

Click the check box to confirm there was no activity during the filing period and click **File Statement of No Activity**.

File an Amendment

To amend a filed campaign finance report, log in to your account and select **Filings** from the left-hand menu. Select **Campaign Finance Report**. On the **Current Draft** tab, select the past Election Cycle and Filing Period to see the current information for that filing period. You can edit transactions, or report additional transactions for past filing periods. When there are updates that have not been submitted on an amendment, you can click **Submit**. The Submit button is deactivated when there have not been any changes to the previous version.

View Previously Submitted Reports

To view campaign finance reports, log in to your account and select **Filings** from the left-hand menu. Select **Campaign Finance Report**. The **Existing Reports** tab displays a list of campaign finance reports that have already been submitted. Select a Report Year to filter the results to a particular year.

Filing Period	Reporting Period	Amendment Version	Date Submitted	View
December Monthly	11/30/2021 - 12/30/2021	Original	02/17/2022 18:54:47	View
November Monthly	10/31/2021 - 11/29/2021	Original	02/17/2022 18:50:13	View

Page 1 of 1 (2 items total)

Figure 30 Existing Reports

Filing Period	Indicates the name of the filing period for which the report was filed.
Reporting Period	Indicates the date range of the filing period for which the report was filed.

Amendment Version	Indicates “original” if there is only one version of the report. If report has been amended, the grid indicates the version number of the most recent filing, and the row can be expanded to see previous versions of the report.
Date Submitted	Indicates the date and time the report was filed.
View	Click View to review a copy of the filed report.

Qualify for Public Funding

The Fair Elections Fund (FEF) program provides matching funds to candidate committees who qualify to participate. Candidates opt into the FEF program in the campaign finance system by submitting an Intent to Participate form and an Application for Certification.

Intent to Participate in the Fair Election Fund

To begin the qualification process, the candidate must log in and select **Committee Information** from the left-hand menu. Below the committee information, click **Qualify for Public Funding**.

Carson for Council Qualify for Public Funding

Intent to Seek Certification

Candidate Name: Barry Carson

Committee Name: Carson for Council

Committee Id: 726

Office Sought: City Council At-Large

Election Date: 03/08/2022

I understand that any contribution made prior to filing this intent to seek certification is not a qualifying contribution per Denver Election Rule 3.9.3(A). After filing this intent to seek certification, I will be subject to contribution limits for participating candidate, until I withdraw from the fair Election Fund program.

CANCEL Submit

Figure 31 Fair Election Fund Intent to Seek Certification Form

The Intent form displays a summary of candidate information. Click the box to affirm you understand the requirements of participating in the FEF program. Click **Submit**.

Application for Certification in the Fair Election Fund

After a candidate committee has submitted the Intent to Participate form, they can Apply for Certification. Below the committee information, click **Certification for Fair Election Fund** to complete the application for certification.

Below the committee’s **Filing Information**, check the boxes to affirm you understand the requirements of participating in the FEF program, and click **Continue**.

Carson for Council

Application for Certification as a Participating Candidate in the Fair Elections Fund

Filing Information

Candidate Name:	Barry Carson
Committee Name:	Carson for Council
Committee ID:	726
Office Sought:	City Council At-Large
Election Date:	03/08/2022

- I understand that I am required to provide an email address and to receive notices at the email address provided
- I certify under penalty of perjury, that:
 - a. I have complied with the restrictions of this chapter during the election cycle to date;
 - b. My candidate campaign committee has filed all campaign finance reports required by law during the election cycle to date and that they are complete and accurate; and
 - c. I will comply with the requirements of this division during the remainder of the election cycle and, specifically, if certified as a participating candidate, will comply with the requirements applicable to participating candidates.

CANCEL **Continue**

Figure 32 Application for Certification in the Fair Election Fund Program

The next page of the application will show the committee's **Filing Information**, a fair elections summary of qualifying contributions, and a report of those qualifying contributions.

Draw a signature or upload a signature image. Click **Submit**.

Withdraw from the Fair Elections Fund

A participating candidate committee can withdraw from the Fair Elections Fund at any point after submitting their intent to participate form.

The candidate or treasurer for the candidate committee must log in and select **Committee Information** from the left-hand menu. Below the committee information, click **Withdraw from Fair Election Fund**.

On the **Withdraw from Fair Election Fund** page, confirm the candidate committee information, check the box to confirm the withdrawal, and draw a signature. Click **Submit**.

Independent Expenditure Filers

Revise Registration

Only the primary user for an independent expenditure (IE) filer can change or revise information about the filer.

If you are the primary user, log into your account and select **Registration** from the left-hand menu. Below the IE filer details, click **Registration**.

On the registration page, make any appropriate changes to revise the filer information and click **Submit**.

Manage Users

Only the primary user for a filer can view, change, and add users to the filer.

If you are the primary user, log in to your account and select **Registration** from the left-hand menu. Below the IE filer details, click **Manage Users**. A list of current users appears in a grid.

Current Users

Role	Indicates the type of role the user holds.
First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Permissions	Indicates the type of activity the user has permission to access for the filer.
Action	Includes options to make the user a primary user or delete the user from the filer.

Make Another User the Primary User

Every filer must have a primary user. If you are the primary user, you can re-assign the role of primary user. To make another user the primary user, click **Make Primary User** in the Action column.

A message appears to confirm that you want to make this user the primary user. Click **Yes** to confirm. The system will send an email message to the user to accept the position. If they do, they will be designated as the primary user and will have the appropriate permissions for the IE filer. The former primary user's role will revert to a normal user role associated with the IE filer.

Remove a User

If you are the primary user, you can remove a user from the IE filer. To delete a user from a filer, click the trash can icon. The user will be removed from the filer and will not have any permissions within the IE filer.

Add a User

If you are the primary user, you can add a user to the IE filer. To invite another person to join a filer, enter their email address and click **Send**. They will receive an email message inviting them to join the IE filer.

Approve or Deny Affiliation Requests

If you are the primary user, you can approve or deny requests to join the IE filer. The Affiliation Request list shows users who have requested access to the IE filer.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Shows the note the user wrote to request access to the IE filer.
Action	Includes options to confirm (a check mark) or deny (an x) access to the IE filer.

If you approve the request, the user will be added to the current users list for the filer. If you deny the request, the user will be moved to the rejected users list and will not have access to the filer's information. The user will be notified by email of either action.

Rejected Requests

The table shows users who have requested access to the committee but have not been approved.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Shows the note the user wrote to request access to the IE filer.

Record Transactions

IE filers enter and record transactions, including contributions and independent expenditures. These transactions are included on independent expenditure reports.

To record a transaction, log in to your account and select **Filings** from the left-hand menu. From the Filings page, select **Transactions**.

Choose the appropriate transaction type.

Contribution	A contribution to the filer.
Independent Expenditure	An expenditure incurred by a filer that advocates for or against a candidate or ballot measure.

Record Contributions

On the left-hand side, report the contributor's contact information. Search for an existing contact or enter in the information for a new contributor. To search for an existing contributor, enter the organization or the individual's name in the Search field. Select a contact from the list of matching names.

Transaction Type
Contribution

Contributor [?] SEARCH

Contributor Type Individual

First Name

Last Name

Employer

Occupation

Address 1

Address 2

City

State

Zip Code

Contribution Type Monetary

Monetary Type [?] Monetary type is required

Date Received month/day/year

Contribution Amount

Election Cycle 2023 Municipal General Election

Upload Receipts Select files... Drop files here to uplo...

Refund

Notes [?]

Figure 33 Transaction Entry Form for Contributions

Individual

First Name	Enter the contributor's first name.
Last Name	Enter the contributor's last name.
Employer	Enter the contributor's employer.
Occupation	Enter the contributor's occupation.
Address 1	Enter the contributor's address.
Address 2	Enter additional information about the contributor's address, such as a suite number.
City	Enter the contributor's city.
State	Enter the contributor's state.
Zip Code	Enter the contributor's zip code.

Organization

Organization Name	Enter the contributor's name.
Address 1	Enter the contributor's address.

Address 2	Enter additional information about the contributor’s address, such as a suite number.
City	Enter the contributor’s city.
State	Enter the contributor’s state.
Zip Code	Enter the contributor’s zip code.

Committee

Committee Name	Enter the committee’s name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee’s address.
Address 2	An auto-populated field containing the committee’s additional address information.
City	An auto-populated field containing the committee’s city.
State	An auto-populated field containing the committee’s state.
Zip Code	An auto-populated field containing the committee’s zip code.

On the right-hand side, enter in details about the contribution. The contribution type indicates whether the contribution was monetary or in-kind.

Monetary Type	Choose the appropriate monetary type: Cash, Check, Credit/Debit, Cryptocurrency, or Other. <i>Only applicable to Monetary contributions</i>
Date Received	Enter the date on which the campaign received the contribution.
Contribution Amount	Enter the amount of the contribution.
Election Cycle	By default, this value shows the current election cycle. Select the election cycle for which the contribution applies.
Description	Enter a brief description of the in-kind contribution. <i>Only applicable to in-kind contributions</i>

Refunds

If the contribution has been refunded, click the “Refund” checkbox and enter details about the refund.

Refund Date	Enter the date the contribution was refunded to the contributor.
Refund Amount	Enter the amount of the refunded contribution.
Reason for Refund	Enter the reason the contribution was refunded, for example, “Refunded excess contribution.” (Optional)

Notes

Enter any notes about the contribution. This note is visible to filers only and won’t appear on campaign finance reports. Click **Save**.

Record Independent Expenditures

On the left-hand side, report the payee’s contact information. Search for an existing contact or enter in the information for a new payee. To search for an existing contact, enter the organization or the individual’s name in the Search field. Select a contact from the list of matching names.

Transaction Type

Payee

Payee Type

First Name

Last Name

Address 1

Address 2

City

State

Zip Code

Electioneering Communication
 Independent Expenditure
 Non-Donor Funds

Date Paid

Amount

Purpose

Method of Communication

Upload Attachments Drop files here to upload

Target Ballot Issue Candidate

Election Cycle

Ballot Issue

Position

Refund

Notes

Figure 34 Transaction Entry Form for an Independent Expenditure

Individual

First Name	Enter the payee’s first name.
Last Name	Enter the payee’s last name.
Address 1	Enter the payee’s address.
Address 2	Enter additional information about the payee’s address, such as a suite number.
City	Enter the payee’s city.
State	Enter the payee’s state.
Zip Code	Enter the payee’s zip code.

Organization

Organization Name	Enter the payee’s name.
Address 1	Enter the payee’s address.
Address 2	Enter additional information about the payee’s address, such as a suite number.
City	Enter the payee’s city.

State	Enter the payee's state.
Zip Code	Enter the payee's zip code.

Committee

Committee Name	Enter the committee's name in this field. Select the desired committee from the list of matching names.
Committee Type	An auto-populated field containing the type of the committee selected.
Address 1	An auto-populated field containing the committee's address.
Address 2	An auto-populated field containing the committee's additional address information.
City	An auto-populated field containing the committee's city.
State	An auto-populated field containing the committee's state.
Zip Code	An auto-populated field containing the committee's zip code.

On the right-hand side, enter in details about the expenditure.

Check the "Electioneering Communication" check box if the expenditure paid for communication that unambiguously refers to any candidate or ballot issue and is broadcast to, printed in a newspaper distributed to, mailed or delivered by hand to, targeted online to, or posted on a billboard to an audience that includes members of the electorate for the candidate or ballot issue.

Check the "Independent Expenditure" check box if the expenditure paid for communication that expressly advocated for the election or defeat of a candidate or supported or opposed a ballot issue.

Date Paid	Enter the date of the independent expenditure.
Amount	Enter the amount of the independent expenditure.

If any portion of the expenditure was paid with non-donor funds, check the "Non-Donor Funds" check box. If checked, the following fields appear.

Source	Enter a description of the source of the non-donor funds.
Amount	Enter the amount of the non-donor funds.
Purpose	Enter the purpose of the independent expenditure.
Method of Communication	Enter the communication method for the independent expenditure (e.g., TV, digital)

Click **Upload Receipt** to attach a copy of the receipt for this independent expenditure. (Optional).

Indicate whether this independent expenditure targets either a Candidate or Ballot Issue.

Candidate

An independent expenditure is spent to support or oppose the target candidate.

Candidate Name	Select the target Candidate's name.
Office Sought	Indicates the office the target Candidate is seeking.

District	Indicates the target Candidate's district.
Position	Select either "Support" or "Oppose" to indicate whether the independent expenditure is in support of or opposition to the target candidate.

Ballot Issue

An independent expenditure is spent to support or oppose the target ballot issue.

Ballot Issue	Select the target ballot issue.
Position	Select either "Support" or "Oppose" to indicate whether the independent expenditure is in support of or opposition to the ballot issue.

Refunds

If the independent expenditure has been refunded, click the "Refund" checkbox.

Refund Date	Enter the date the independent expenditure was refunded to the payee.
Refund Amount	Enter the amount of the refunded independent expenditure.

Notes

Enter any notes about the expenditure. This note is visible to filers only and won't appear on independent expenditure reports. Click **Save**.

[File Independent Expenditure Reports](#)

Filers can view filed reports and submit new independent expenditure reports. To view or file independent expenditure reports, log in to your account and select **Filings** from the left-hand menu. Select **Independent Expenditure Report**.

The Independent Expenditure Report consists of a few different sections. Filing Information contains information about the filer and the specific report. The Summary displays the total for the filing period for each type of transaction. Below these sections, there are lists of transactions in the election cycle, grouped by transaction type. A transaction type name is only shown when there are related records on the filing.

Filing Information

IE Name Grayson Grimmel

IE ID 313

Election Cycle **Sample City Council Election**

Filing Period: Independent expenditure reports are due within 48 hours of making the expenditure. An IE Report is required after the first expenditure of \$1,000 or more and after each expenditure after that point. Additional detailed instructions continue on here.

Summary

Total Monetary Contributions: \$0.00

Total In-Kind Contributions: \$0.00

Total Refunds: \$0.00

Total Independent Expenditures: \$650.00

Independent Expenditures >

Date	Amount	Payee Name	Payee Type	Address	City	State	Zip
+ 12/22/21	\$250.00	Acme Print Co	Organization	432 Main	Denver	CO	88888
+ 12/30/21	\$400.00	Joanna Kepler	Individual	654 Main	Denver	CO	88888

Figure 35 Independent Expenditure Report

Click the transaction type to show the related transactions. Click to expand a transaction to see more details.

On the **Current Draft** tab, you can review and submit a draft independent expenditure report. Select the appropriate Election Cycle to view the related draft. Carefully review the transactions below. If needed, you can click the pencil icon to edit a transaction.

View Previously Submitted Reports

To view independent expenditure reports, log in to your account and select **Filings** from the left-hand menu. Select **Independent Expenditure**. The **Existing Reports** tab displays a list of independent expenditure reports that have already been submitted.

Choose the appropriate year from the Report Year dropdown.

Election Cycle	Indicates the name of the election cycle for which the report was filed.
Election Date	Indicates the election date for which the report was filed.
Amendment Version	Indicates “original” if there is only one version of the report. If report has been amended, the grid indicates the version number of the most recent filing, and the row can be expanded to see previous versions of the report.
Date Submitted	Indicates the date and time the report was filed.
View	Click View to review a copy of the filed report.

Search Transactions

Any user can search for a transaction (a contribution, expenditure, loan, etc.) and edit information about the transaction.

Log in to your account and select **Filings** from the left-hand menu. From the Filings page, select **Search Transactions**.

Cook for Auditor

Search Transactions

The screenshot shows the 'Search Transactions' interface. At the top, there is a search bar with a magnifying glass icon, a 'SEARCH' button, and an 'ADD TRANSACTION' button. Below the search bar, there are filter options: 'Filter By: Transaction Type', 'Transaction Date' (with 'Start Date' and 'End Date' sub-fields), and 'Transaction Amount' (with 'Min Amount \$' and 'Max Amount \$' sub-fields). The main content is a table with the following columns: Transaction Type, Date, Amount, Name, City, State, and Action. The table contains 7 rows of transaction data. At the bottom of the table, there is a pagination control showing '1' and '1 - 7 of 7 items'.

Transaction Type	Date	Amount	Name	City	State	Action
+ Expenditure	12/20/2021	\$200.00	Colorado Lodging Association	Denver	CO	
+ Monetary Contribution	12/20/2021	\$55.00	Richard Pointer	Denver	CO	
+ Monetary Contribution	12/15/2021	\$75.00	Haley Fredricks	Denver	CO	
+ Expenditure	12/15/2021	\$150.00	Elevation Development Group LLC	Englewood	CO	
+ In-Kind Contribution	12/14/2021	\$77.00	James Potter	Denver	CO	
+ Monetary Contribution	12/10/2021	\$105.00	Streamline Design	Denver	CO	
+ Expenditure	12/10/2021	\$100.00	Hopo One LLC	Denver	CO	

Figure 36 Search Transactions

On the **Search Transactions** page, enter a name or part of a name and click **Search** to find transactions related to a particular contact (contributor, payee, etc.). You can also filter the results by:

- Transaction Type
- Transaction Date – enter a start and end date
- Transaction Amount – enter a minimum and maximum amount

The search results display a brief summary of information about each transaction.

Transaction Type	Indicates the type of transaction.
Date	Indicates the date of the transaction.
Amount	Indicates the amount of the transaction.
Name	Indicates the name of the person who made the transaction.
City	Indicates the city of the person who made the transaction.
State	Indicates the state of the person who made the transaction.
Zip Code	Indicates the zip code of the person who made the transaction.
Action	Click the pencil icon to change any information about the transaction.

If you discover that the transaction is not in the system, you can add it. Click **Add Transaction**.

See [Record Individual Transactions](#).

Search Contacts

Any user can search for a contact (a contributor, payee, etc.) and edit contact information such as address or phone number.

Log in to your account and select **Filings** from the left-hand menu. From the Filings page, select **Search Contacts**.

Cook for Auditor Search Contacts

The screenshot shows the 'Search Contacts' interface. At the top, there is a search bar with a magnifying glass icon and a 'SEARCH' button. Below the search bar, there are filter options: 'Filter By: Role', 'State', 'City of Denver' (with a checkbox), and 'Contact Type'. The main area displays a table with the following columns: Contact Name, Role, Employer, Occupation, City, State, Zip Code, Type, and Action. The table contains seven rows of data, each with a pencil icon in the Action column. At the bottom right of the table, it says '1 - 7 of 7 items'.

Contact Name	Role	Employer	Occupation	City	State	Zip Code	Type	Action
Hopo One LLC	Contributor			Denver	CO	80220	Organization	
Elevation Development Group LLC	Contributor			Englewood	CO	80206	Organization	
Colorado Lodging Association	Contributor			Denver	CO	80237	Organization	
Streamline Design	Contributor			Denver	CO	89565	Organization	
Haley Fredricks	Contributor	Apple	Engineer	Denver	CO	80454	Individual	
Richard Pointer	Contributor	Coca-Cola	VP	Denver	CO	80454	Individual	
James Potter	Contributor	Hogwarts	student	Denver	CO	88888	Individual	

Figure 37 Search Contacts

On the **Search Contacts** page, enter a name or part of a name and click **Search**. You can also filter the results by:

- Role
- State
- City of Denver – check to only include addresses within Denver
- Contact Type – individual or organization

The results appear in a grid.

Contact Name	Indicates the contact's name.
Role	Indicates the contact's role.
Employer	For individuals, indicates the contact's employer.
Occupation	For individuals, indicates the contact's occupation.
Address	Indicates the contact's address.
City	Indicates the contact's city.
State	Indicates the contact's state.
Zip Code	Indicates the contact's zip code.
Type	Indicates whether the contact is an individual or organization.
Action	Click the pencil icon to change the contact's information.

Lobbyists

Amend Registration

While logged in, select **Registration** from the left-hand menu to view the current registration for this lobbyist. Below the Lobbyist details, click **Amend Registration**. You will see a registration form pre-populated with the current registration information. Make any appropriate changes while stepping through the form and click **Submit**.

Manage Users

Only the primary user for a lobbyist can view, change, and add users to the lobbying entity.

If you are the primary user, log in to your account and select **Registration** from the left-hand menu. Below the lobbyist details, click **Manage Users**. A list of current users appears in a grid.

Current Users

Role	Indicates the type of role the user holds with the lobbyist.
First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Action	Includes options to make the user a primary user or delete the user from the lobbying entity.

Make Another User the Primary User

Every filer must have a primary user. If you are the primary user, you can re-assign the role of primary user. To make another user the primary user, click **Make Primary User** in the Action column.

A message appears to confirm that you want to make this user the primary user. Click **Yes** to confirm. The system will send an email message to the user to accept the position. If they do, they will be designated as the primary user and will have the appropriate permissions for the lobbyist. The former primary user's role will revert a normal user role associated with the lobbyist.

Remove a User

If you are the primary user, you can remove a user from the lobbying entity. To delete a user from a lobbying entity, click the trash can icon. The user will be removed from the lobbying entity and will not have any permissions within the lobbyist.

Add a User

If you are the primary user, you can add a user to the lobbying entity. To invite another person to join the lobbying entity, enter their email address and click **Send**. They will receive an email message inviting them to join the lobbying entity.

Approve or Deny Affiliation Requests

If you are the primary user, you can approve or deny requests to join the lobbying entity. The Affiliation Request list shows users who have requested access to the lobbying entity.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.

Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Shows the note the user wrote to request access to the lobbyist.
Action	Includes options to confirm (a check mark) or deny (an x) access to the lobbyist.

If you approve the request, the user will be added to the current users list for the lobbyist. If you deny the request, the user will be moved to the rejected users list and will not have access to the filer's information. The user will be notified by email of either action.

Rejected Requests

The table shows users who have requested access to the lobbyist but have not been approved.

First Name	Indicates the user's first name.
Last Name	Indicates the user's last name.
Username (Email)	Indicates the user's email address, which serves as the username.
Request Note	Shows the note the user wrote to request access to the lobbyist.

File Lobbying Reports

Lobbyists must file bi-monthly reports about lobbying activity.

To file a lobbying report, log in to your account and select **Filings** from the left-hand menu. Select Current Draft from the tabs above the grid of reports.

Filing Information

Lobbyist Name	Indicates the name of the lobbying firm or individual lobbyist.
Lobbyist ID	Indicates the ID number of the lobbyist.
Address 1	Indicates the lobbyist's business address.
Address 2	Indicates additional information about the lobbyist's address, such as a suite number.
City	Indicates the lobbyist's city.
State	Indicates the lobbyist's state.
Zip Code	Indicates the lobbyist's zip code.
Business Phone	Indicates the lobbyist's business phone number.
Email	Indicates the lobbyist's business email address.

From the Filing Period dropdown, select the appropriate period for the bi-monthly report. If you have no expenses for this filing period, check the boxes to confirm no gifts or expenditures to covered officials during this filing period.

Filing Period

June Lobbying Report ▼

Pursuant to D.R.M.C. 2-303(c)(2), provide an itemized list and the estimated value of all gifts, entertainment, and direct or indirect expenditures to, on behalf of, or benefiting the covered official for lobbying purposes, including but not limited to: monies, tickets, gratuities, transfers, loans, advances, deposits, promises, expressed or implied agreements, or any tangible or intangible thing of value of any amount. Each person who lobbied during the reporting period must be a registered lobbyist with the Denver City Clerk.

I certify that I did not make any gifts or expenditures to covered officials during this filing period. [Ⓜ]

Lobbyist Name	Name of Covered...	Date	Official Title	Legislative Matter	Estimated Dollar ...	Client
No records available.						

Report Lobbying Expense

Lobbyist Name
Select lobbyist contact ▼

Date
month/day/year

Name of Covered Official

Official Title

Legislative Matter

Estimated Dollar Value

Client
Select client ▼

CANCEL SAVE

Figure 38 Lobbying Report

The grid shows current lobbying expenses in the report. Click the pencil icon to edit an expense or the trash icon to delete an expense. Below the grid, use the Report Lobbying Expense form to add a new lobbying expense to the report.

Lobbyist Name	Select the name of the lobbyist who incurred the lobbying expense.
Date	Enter the date of the lobbying expense.
Name of Covered Official	Enter the name of the city official who was lobbied.
Official Title	Enter the title of the official who was lobbied.
Legislative Matter	Enter the legislative matter of interest to the client.
Estimated Dollar Value	Enter the dollar value of the lobbying expense.
Client	Select the client on whose behalf the money was expended.

Click **Save** to save the expense and view it in the grid above.

Click **Submit** to submit the Lobbying Report.

View Previously Submitted Reports

To view filed lobbying reports, log in to your account and select **Filings** from the left-hand menu. For Lobbyist filers, the right-hand pane shows a grid of existing reports.

Filing Period	Indicates the name of the filing period for the report.
Reporting Period	Indicates the date range of the report.
Amendment Version	Indicates the version of the report for the filing period.
Date Submitted	Indicates the date and time the report was submitted.
View	Click View to view a full copy of the report.

File an Amendment

To amend a filed lobbying report, log in to your account and select **Filings** from the left-hand menu.

On the **Current Draft** tab, modify any information about the lobbying report and click **Submit**.