SearchLight Denver
OFFICE OF THE DENVER CLERK AND RECORDER | PAUL D. LÓPEZ

# Campaign Finance System Filer Guide

## Table of Contents

# 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.

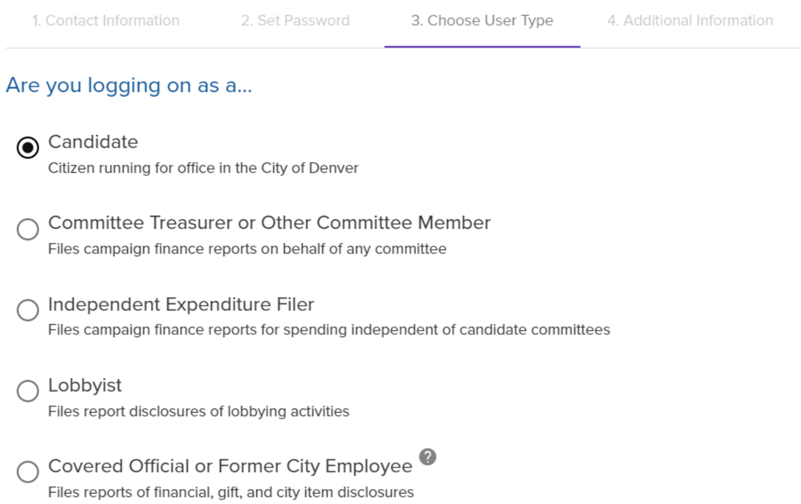



*Figure 1 Choose User Type*

| **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**.

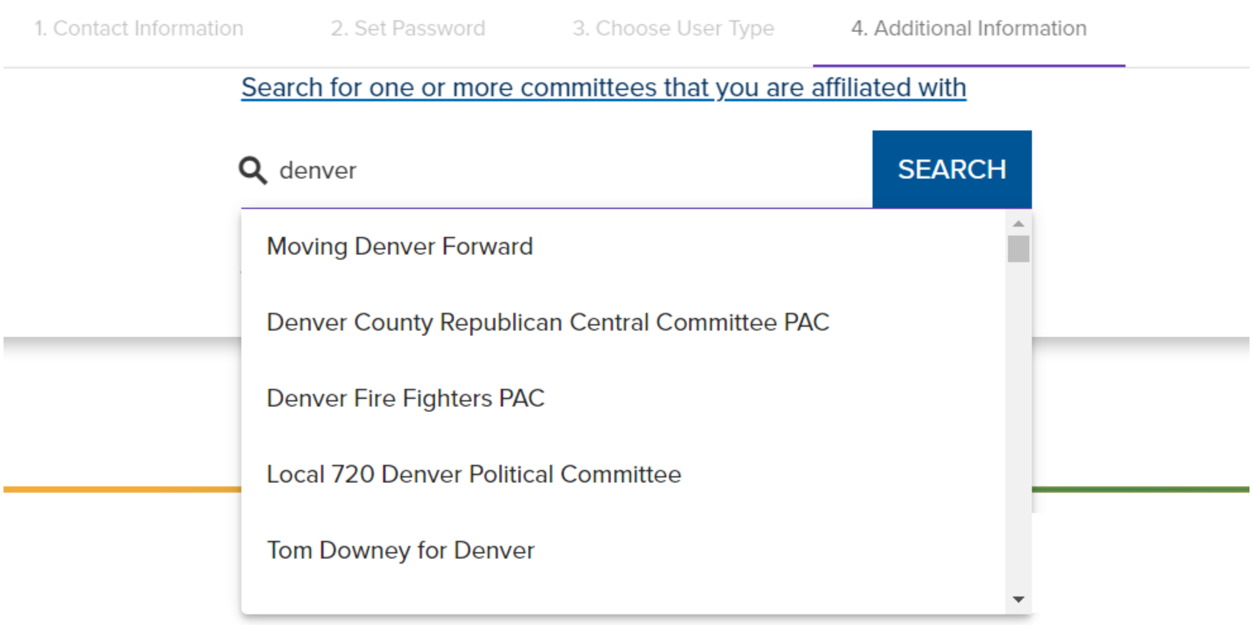



*Figure 2 Joining an Existing Committee*

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.**

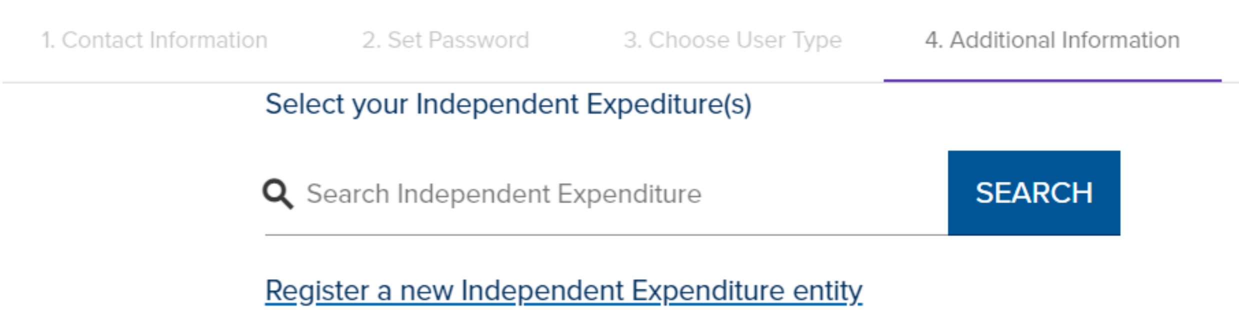



*Figure 3 Joining an Existing Independent Expenditure Filer*

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.

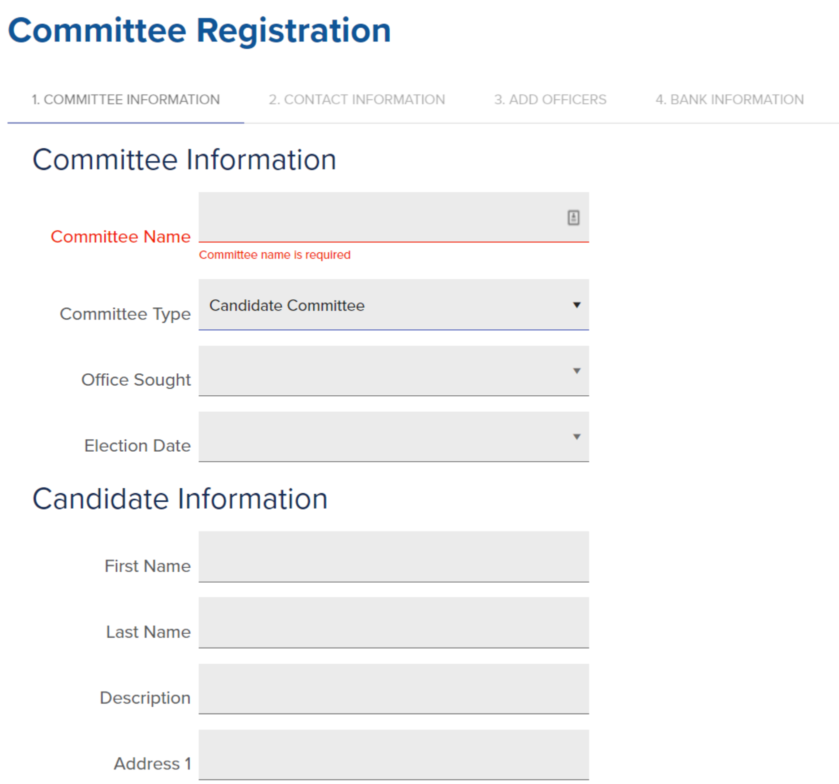



*Figure 4 Committee Registration*

**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.

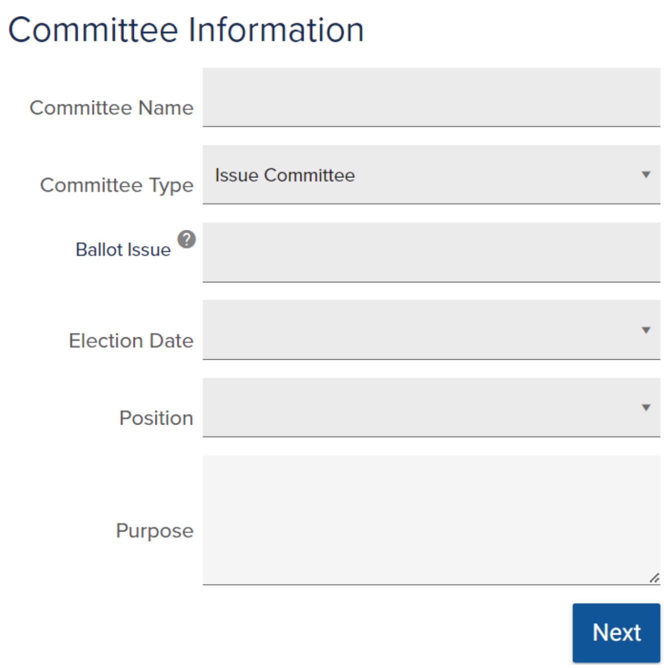



*Figure 5 Registering an Issue Committee*

| | |
|---|---|
| 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.

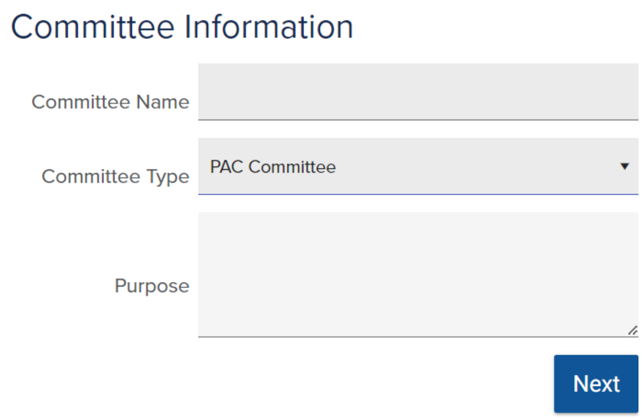



*Figure 6 Registering a Committee of Another Type*

| | |
|---|---|
| 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.

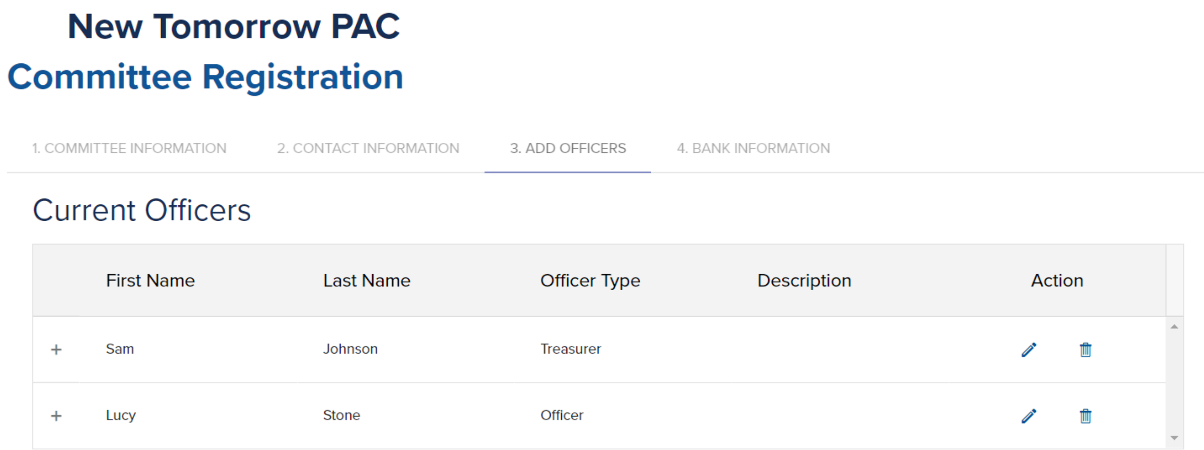



*Figure 7 Committee Registration, Add Officers*

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**.

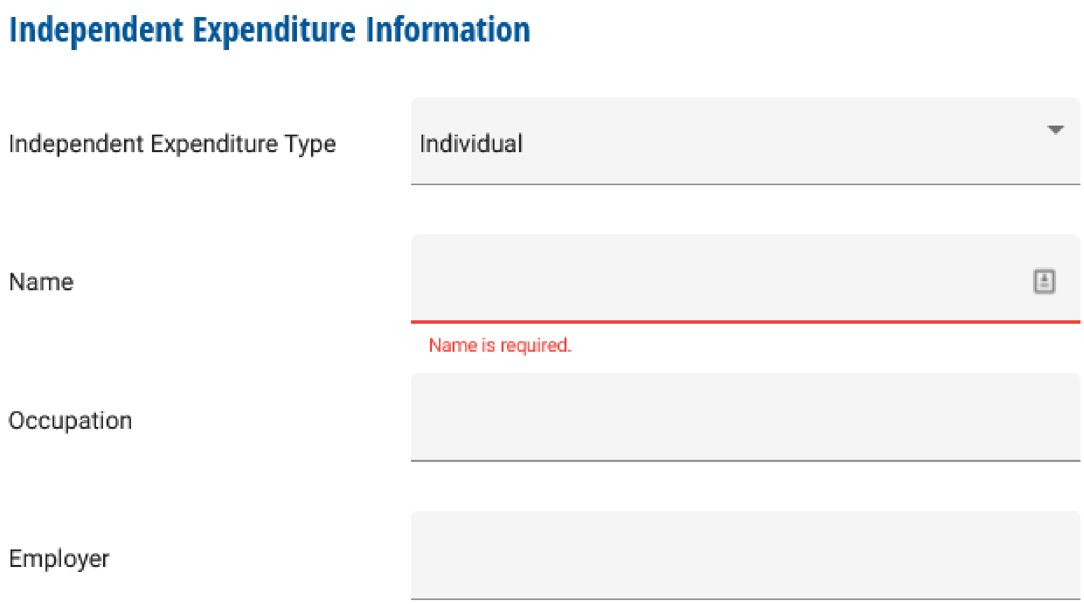



*Figure 8 Independent Expenditure Registration*

**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.

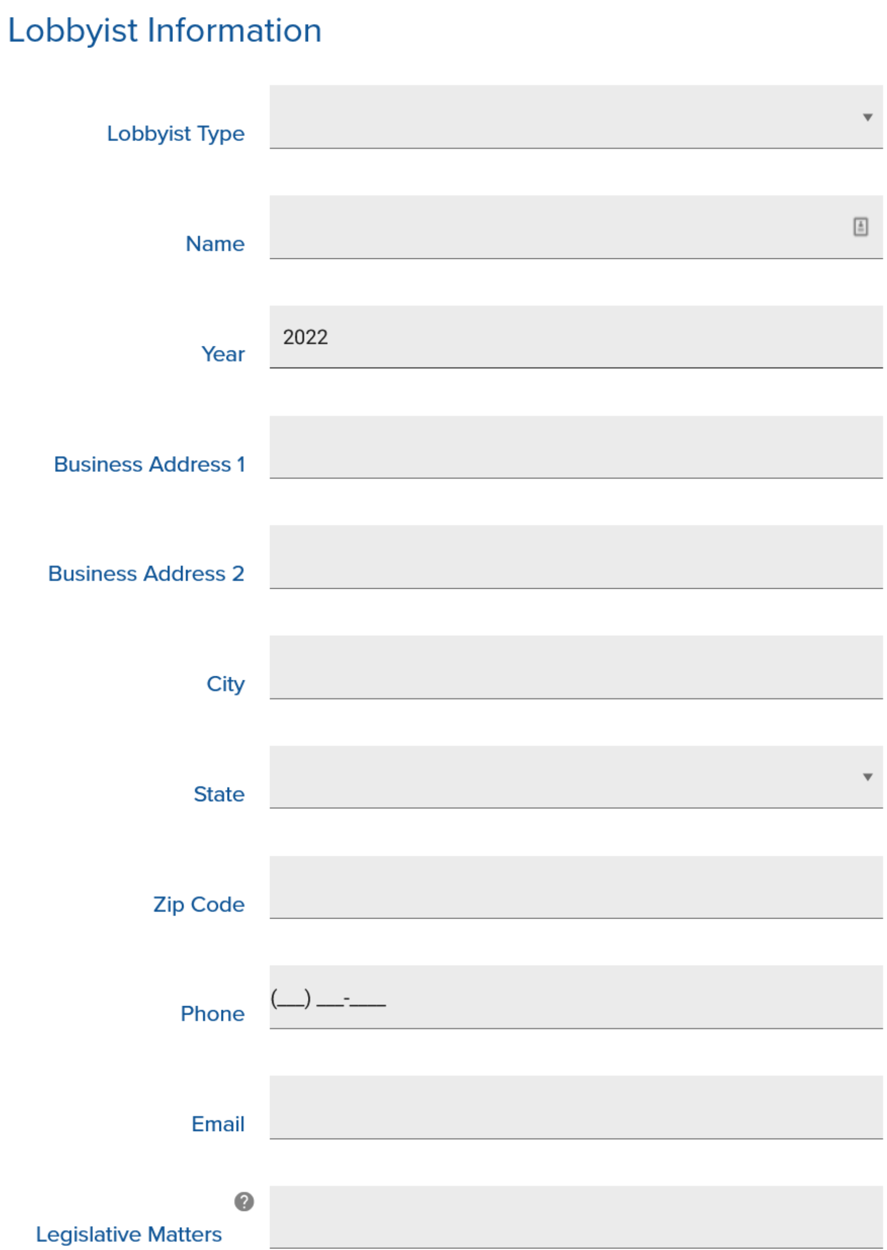



*Figure 9 Lobbyist Information Form*

**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.

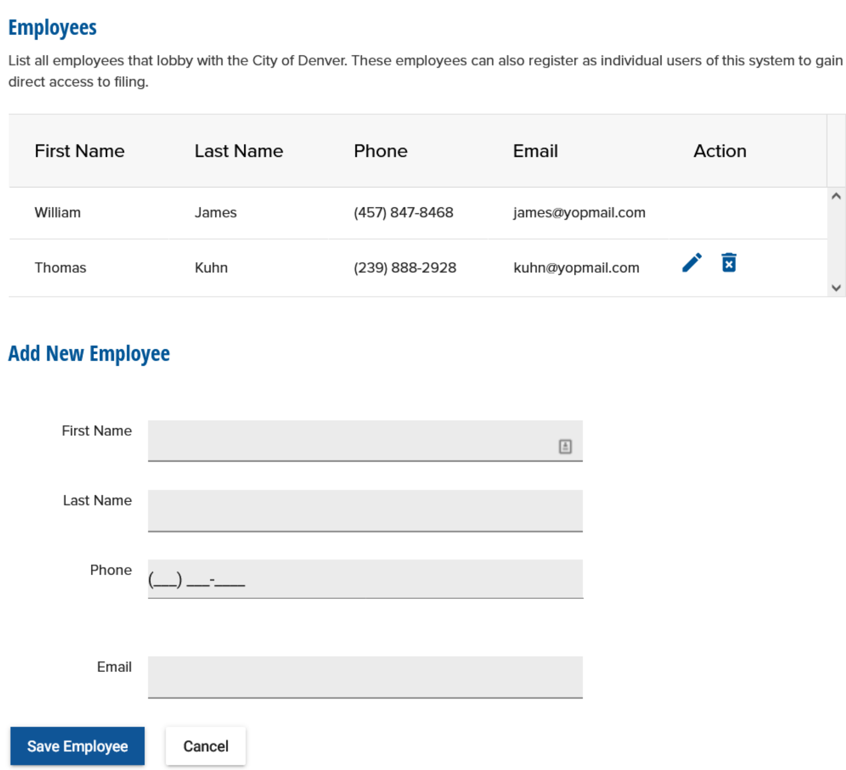



*Figure 10 Employees on a Lobbyist Registration*

**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.

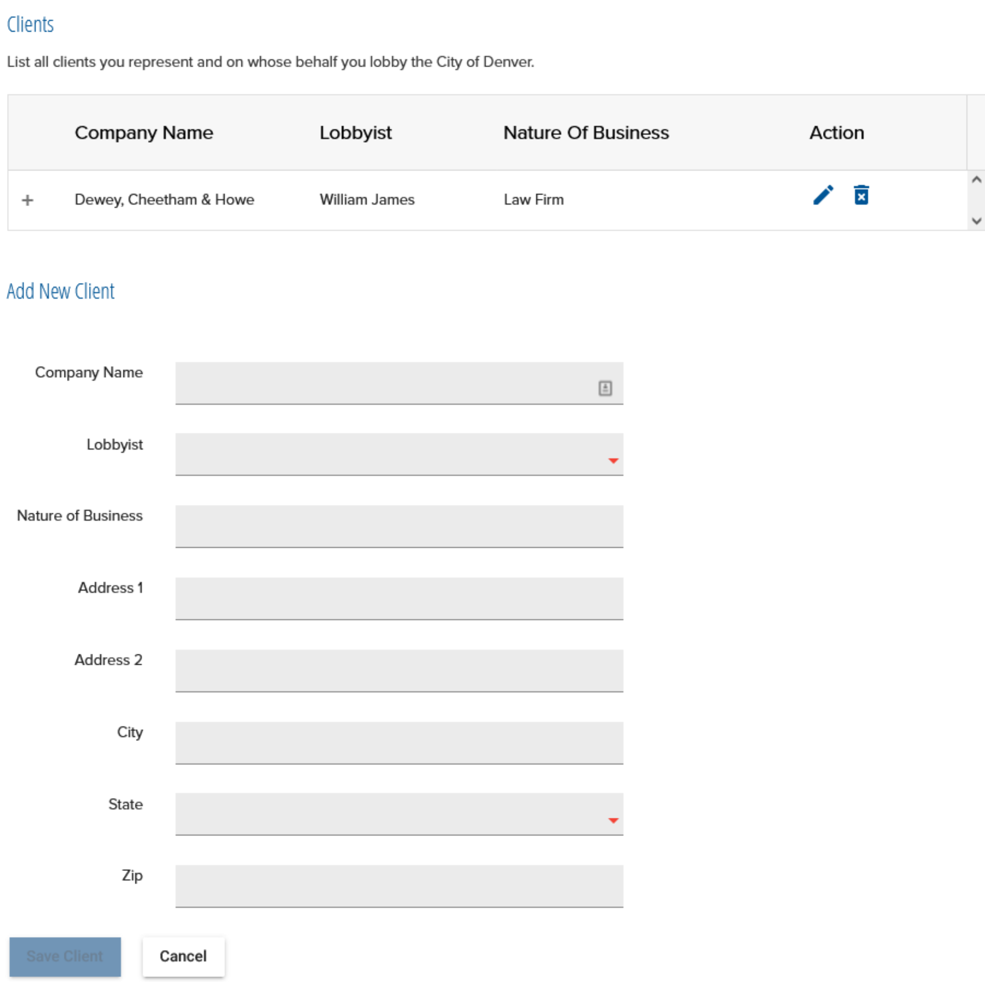



*Figure 11 Clients on a Lobbyist Registration*

**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**.

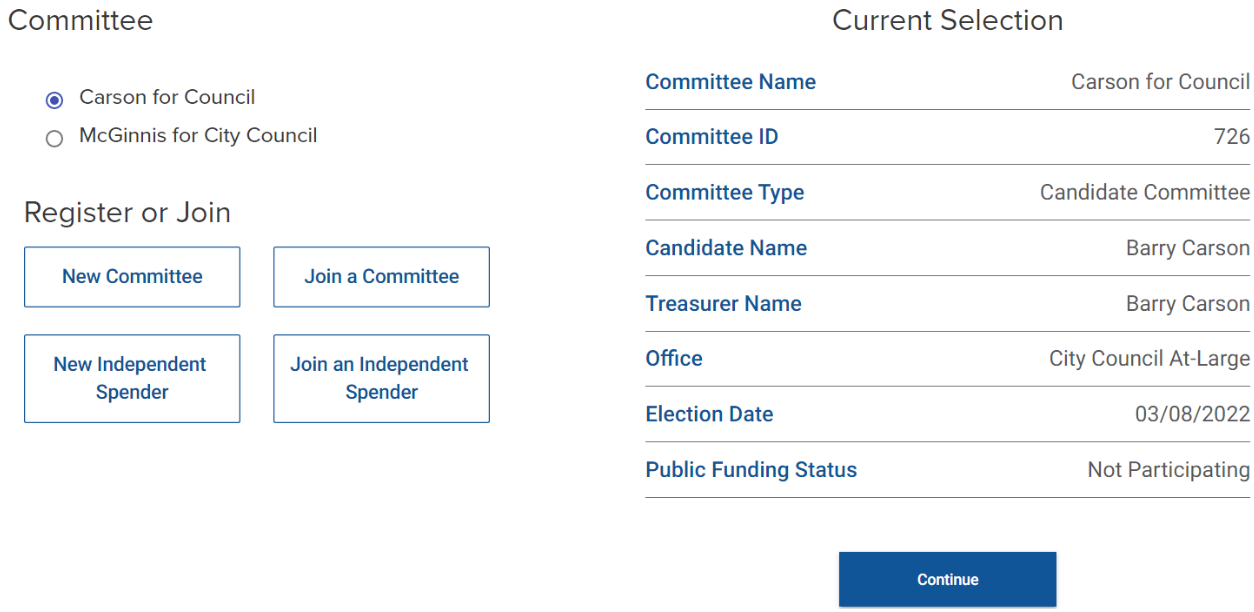



*Figure 12 Switch Committees*

### 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.

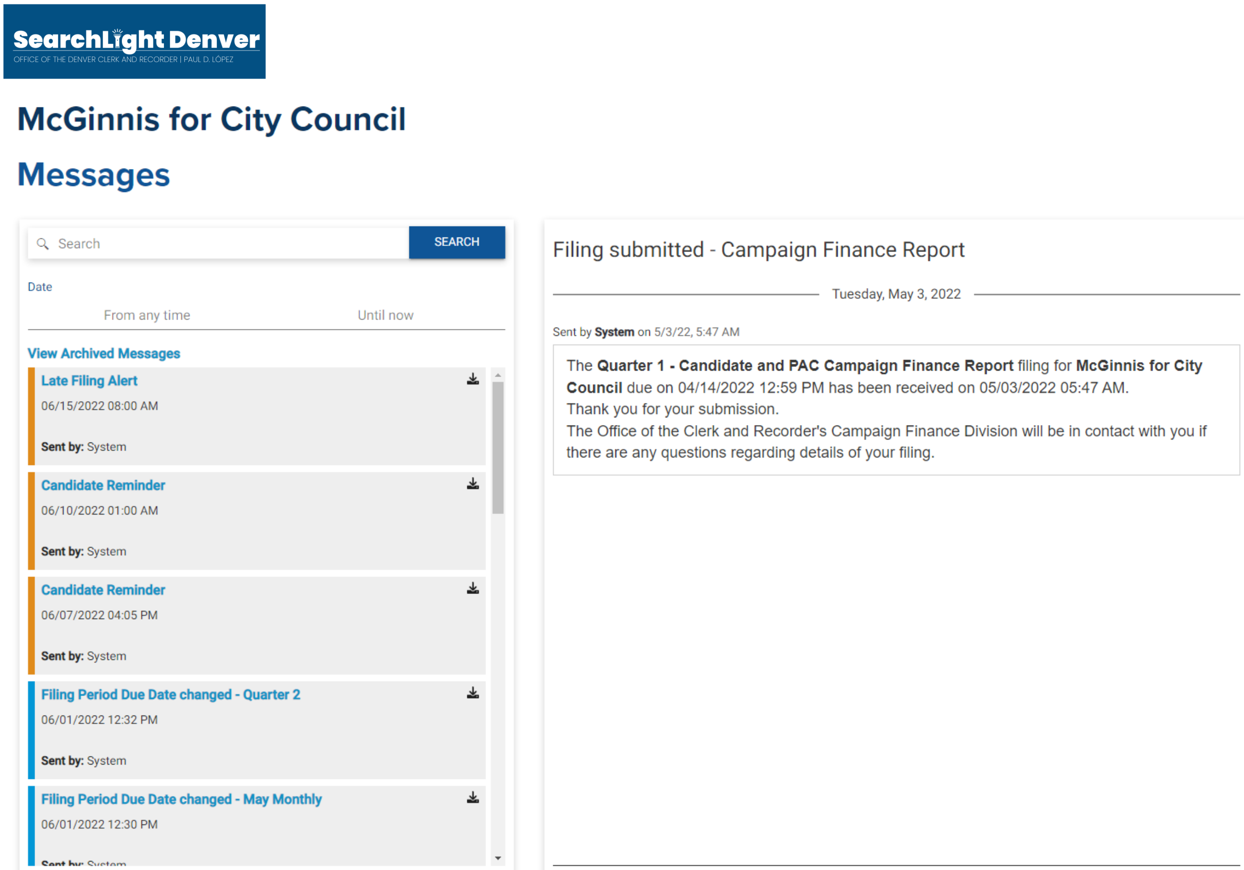



*Figure 13 Messages Inbox with a Sample Message Selected*

## 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**.

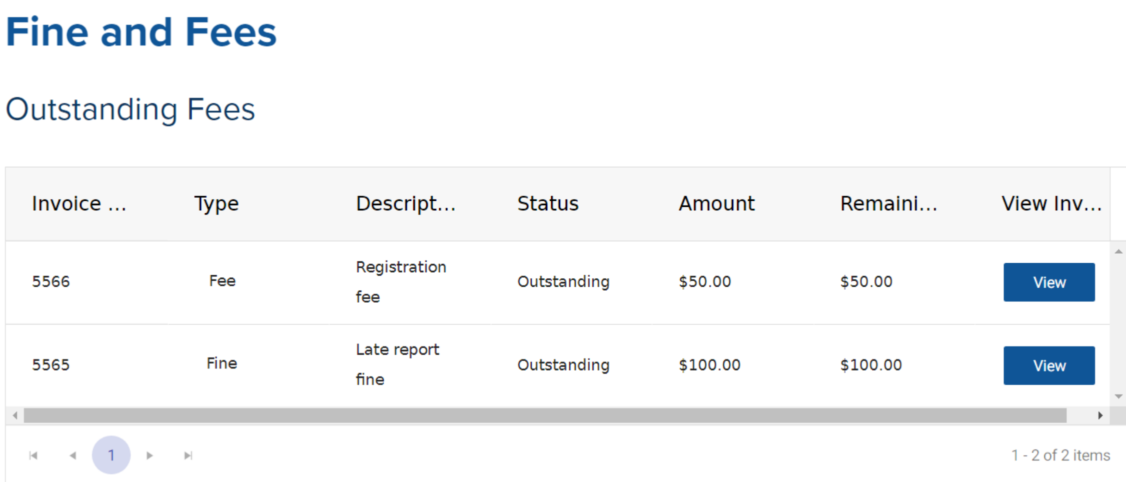
## Search Messages

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

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.

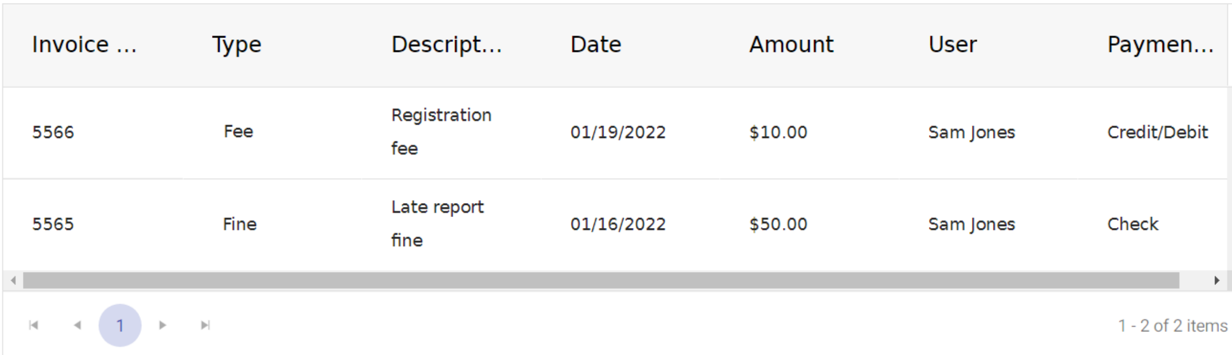
| | |
|---|---|
| Invoice Number | Indicates the invoice number of the fine, fee, or penalty. |
| Type | Indicates the type of invoice (i.e., Fine, Fee, or Penalty.) |
| Description | Describes the fine, fee, or penalty. |
| Status | Indicates the status of the fine, fee, or penalty. |
| Amount | Indicates 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.

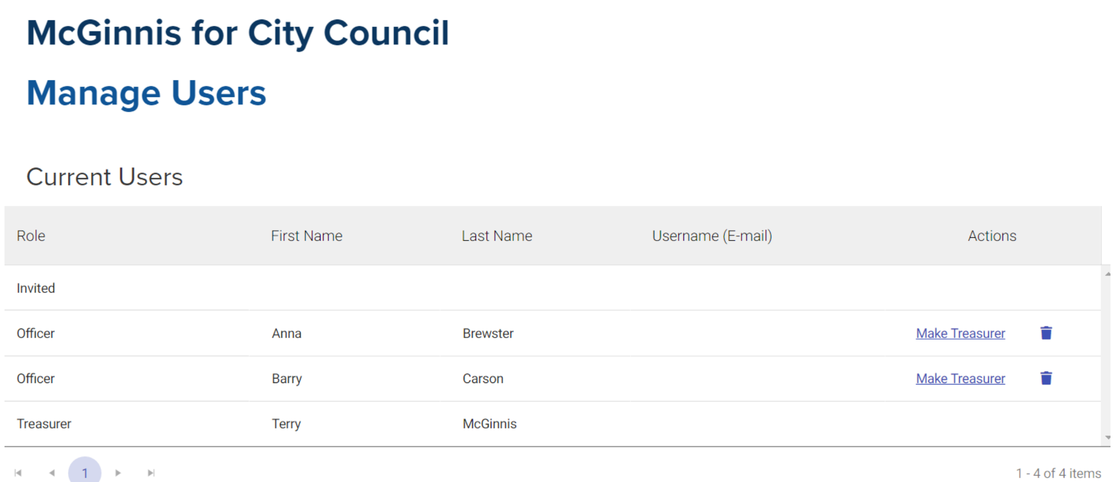



*Figure 16 Current Users*

**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.

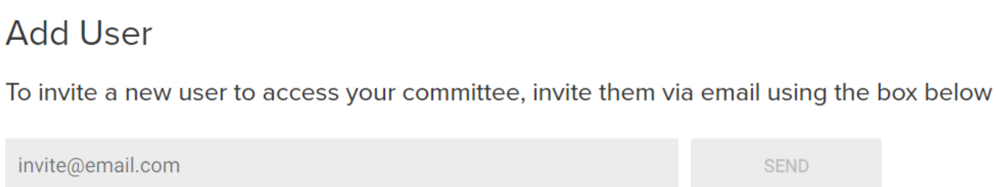



*Figure 17 Add a User to Your Committee*

## 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.

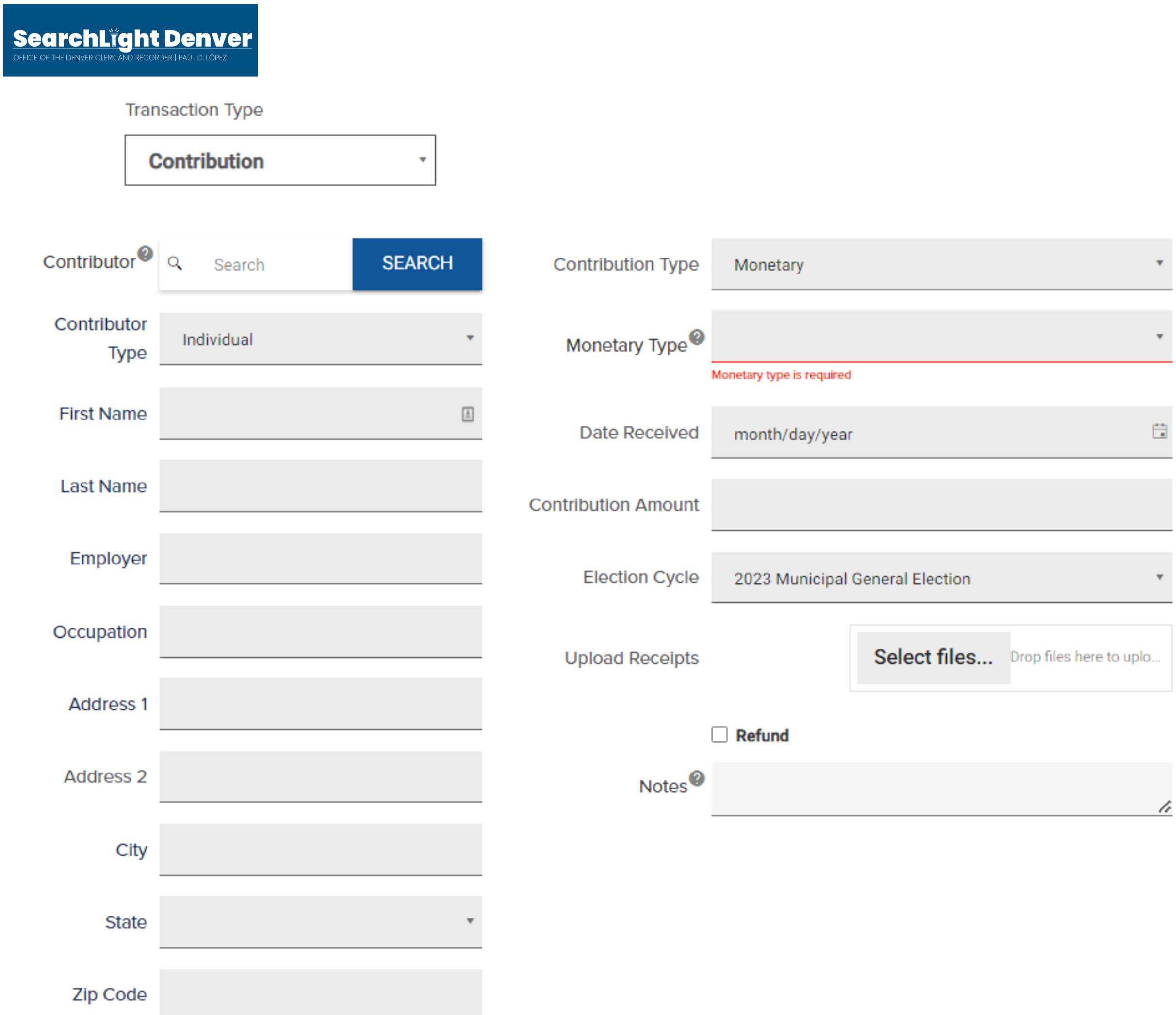



*Figure 18 Transaction Entry Form for Contributions*

**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.<br>*Only applicable to Monetary contributions* |
| 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.<br>*Only applicable to in-kind contributions* |

**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.

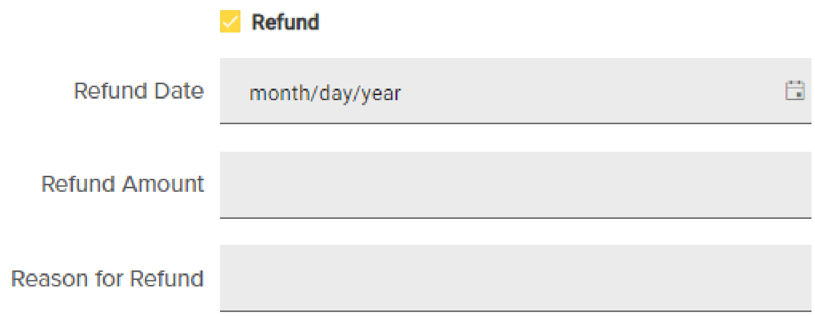



*Figure 19 Entering a Contribution with a Refund*

| | |
|---|---|
| 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.

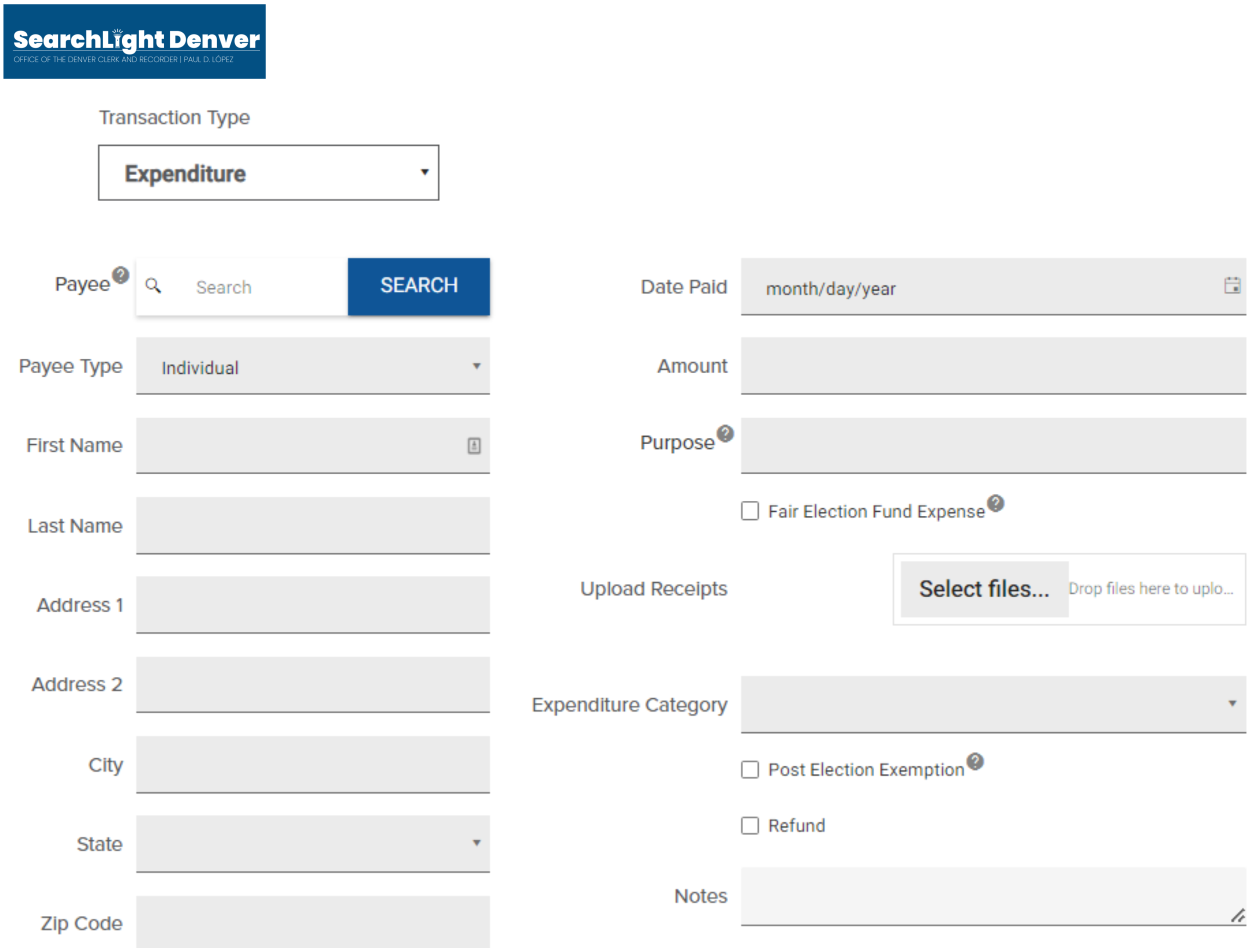



*Figure 20 Transaction Entry Form for Expenditures*

**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.

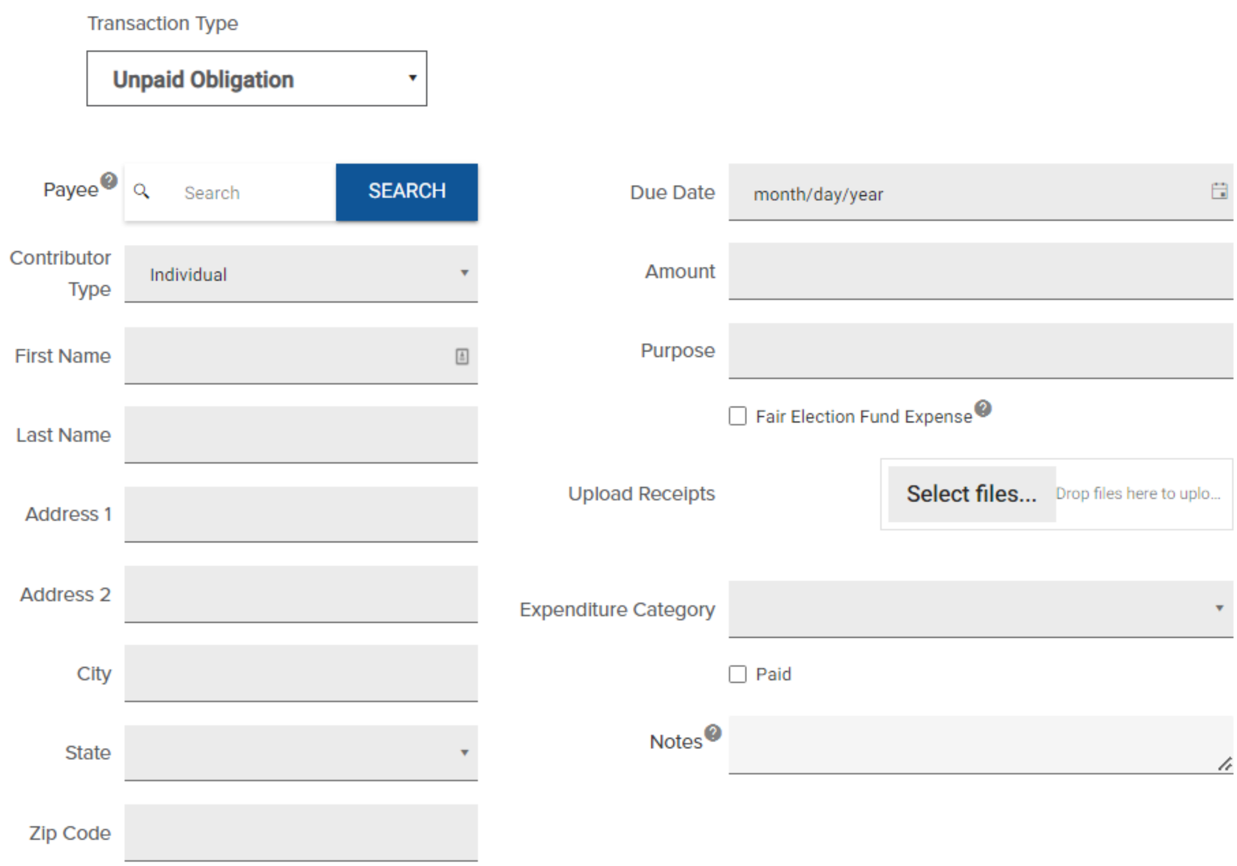



*Figure 21 Transaction Entry Form for Unpaid Obligations*

**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.

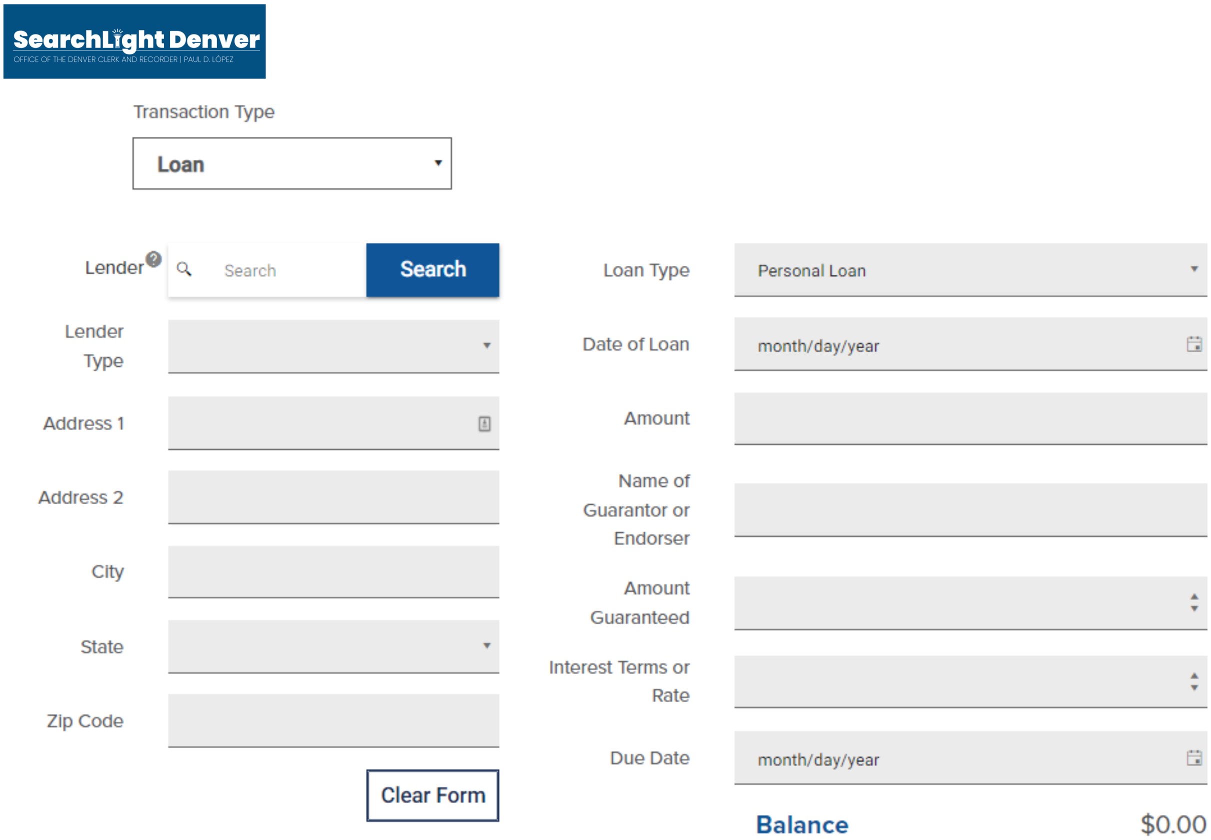



*Figure 22 Transaction Entry Form for Loans*

**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.

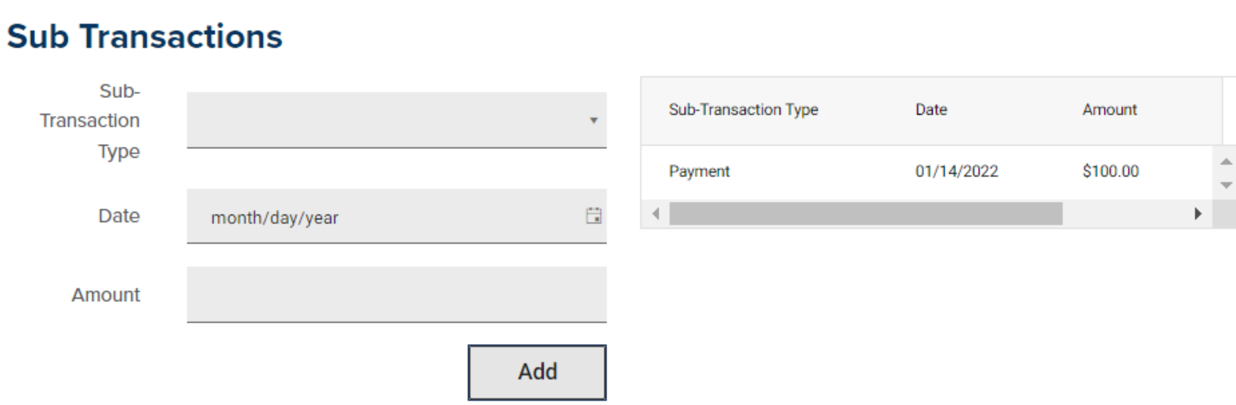



*Figure 23 Adding Sub-Transactions to a Loan*

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**.

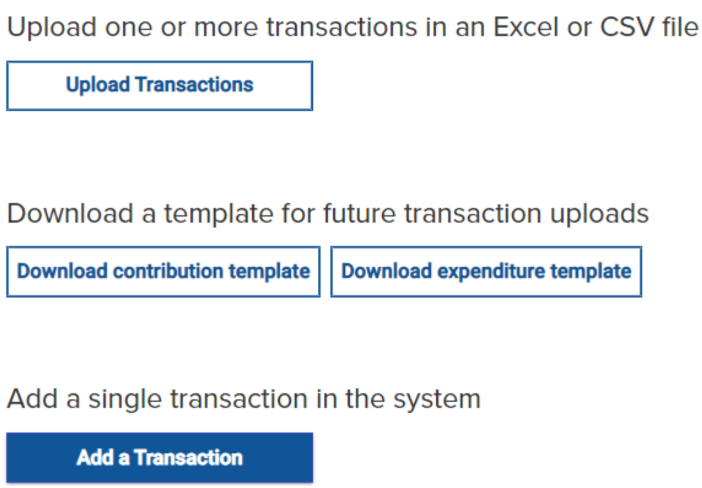



*Figure 24 Options on the Upload Data Page*

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.

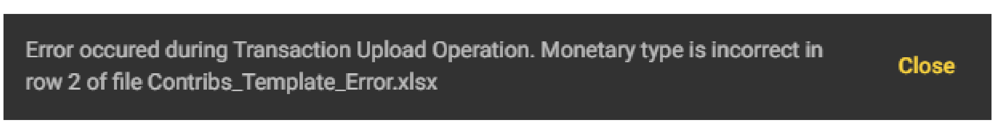



*Figure 25 Sample Upload Error*

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.

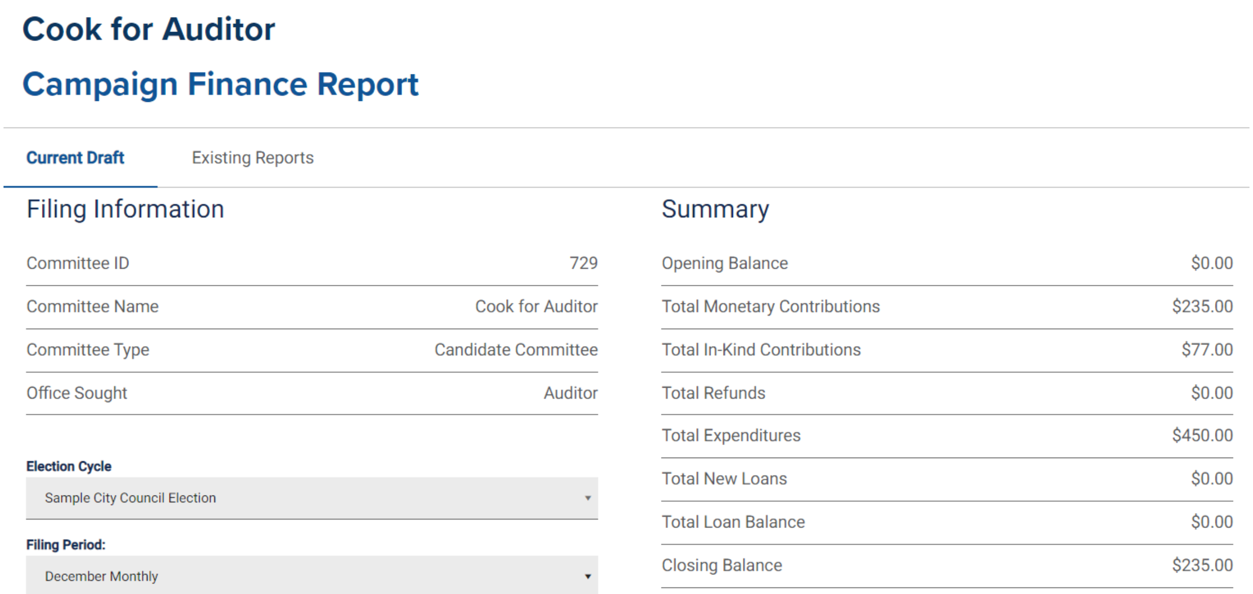



*Figure 26 Campaign Finance Report, Filing Information and Summary*

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.

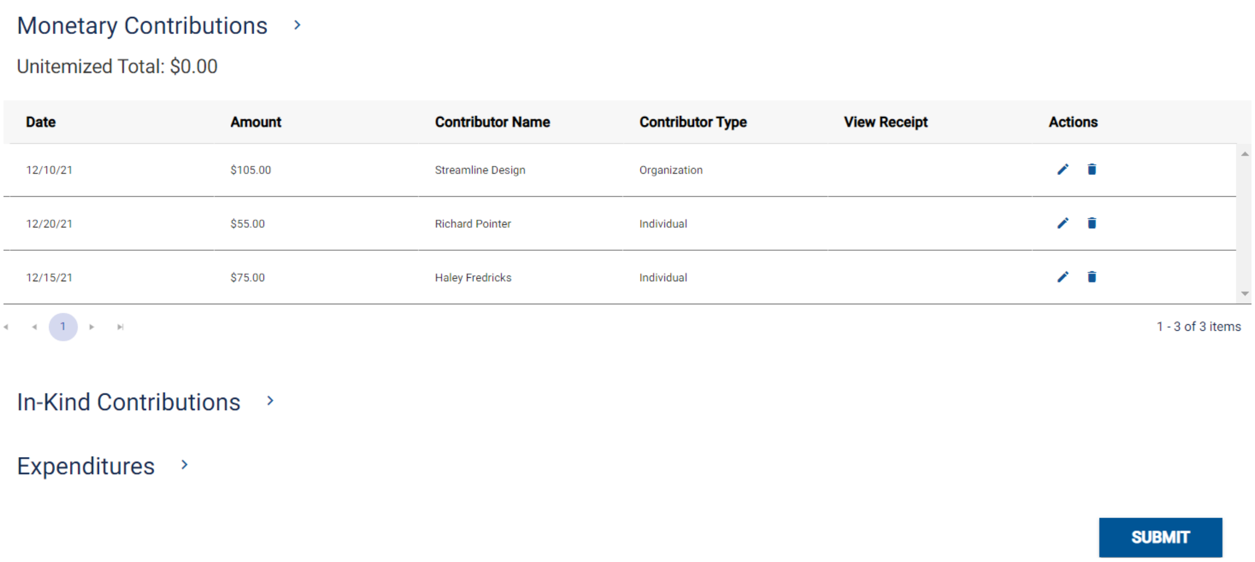



*Figure 27 Campaign Finance Report Transactions*

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.

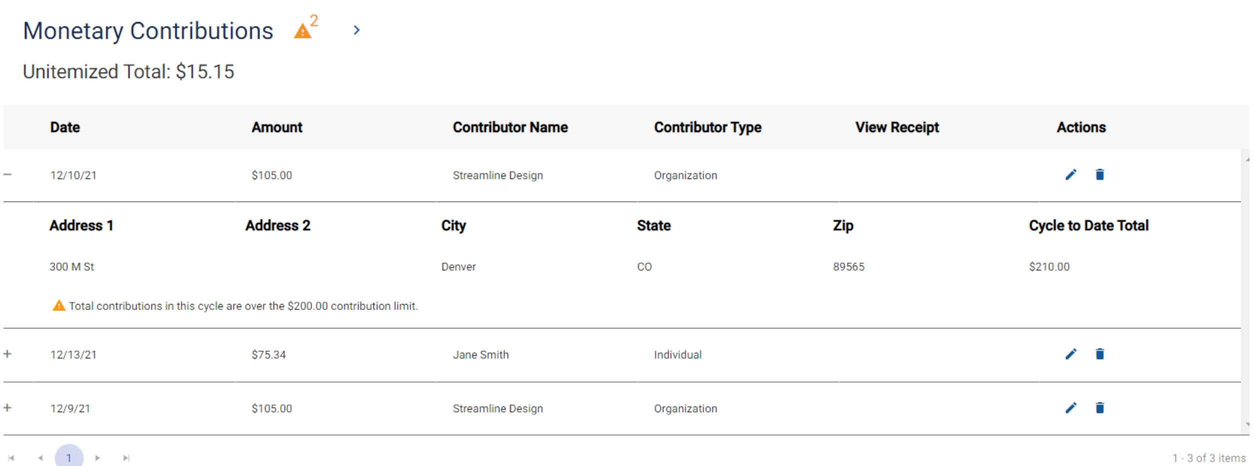



*Figure 28 Contribution Limit Warning on a Campaign Finance Report*

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.*

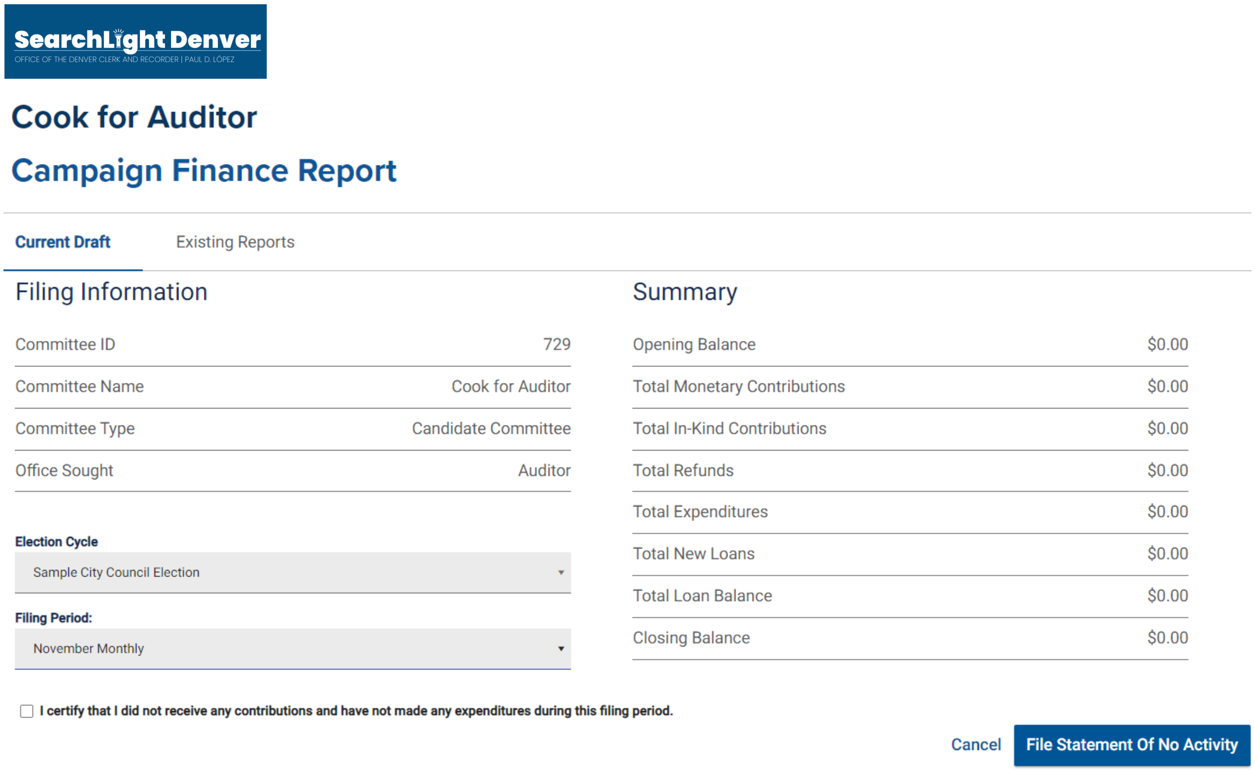



*Figure 29 Statement of No Activity*

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.

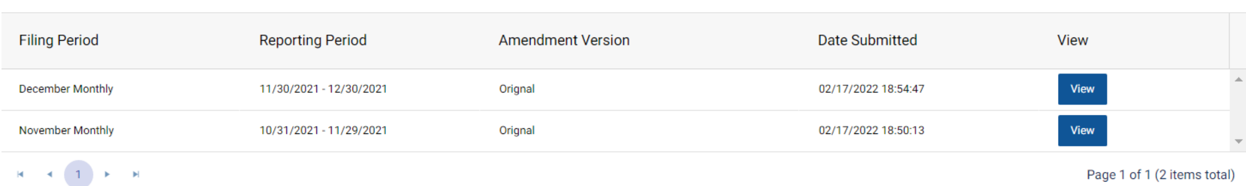



*Figure 30 Existing Reports*

| | |
|---|---|
| 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**.

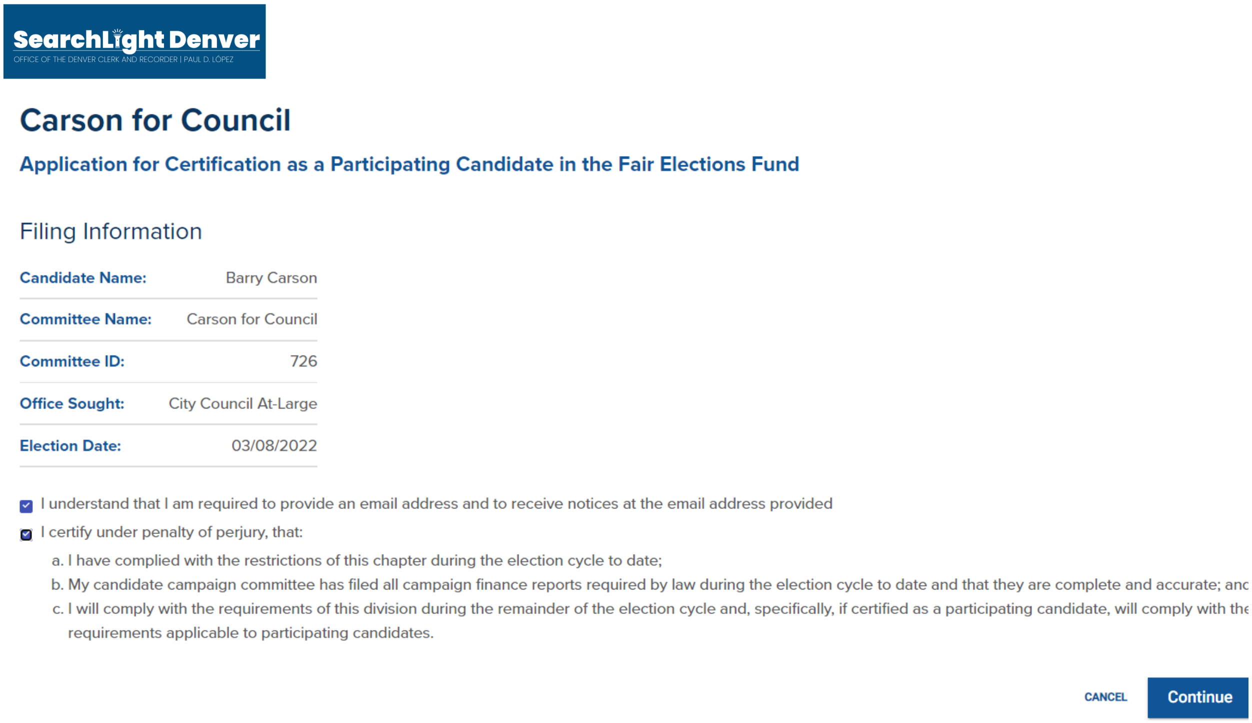



*Figure 32 Application for Certification in the Fair Election Fund Program*

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.

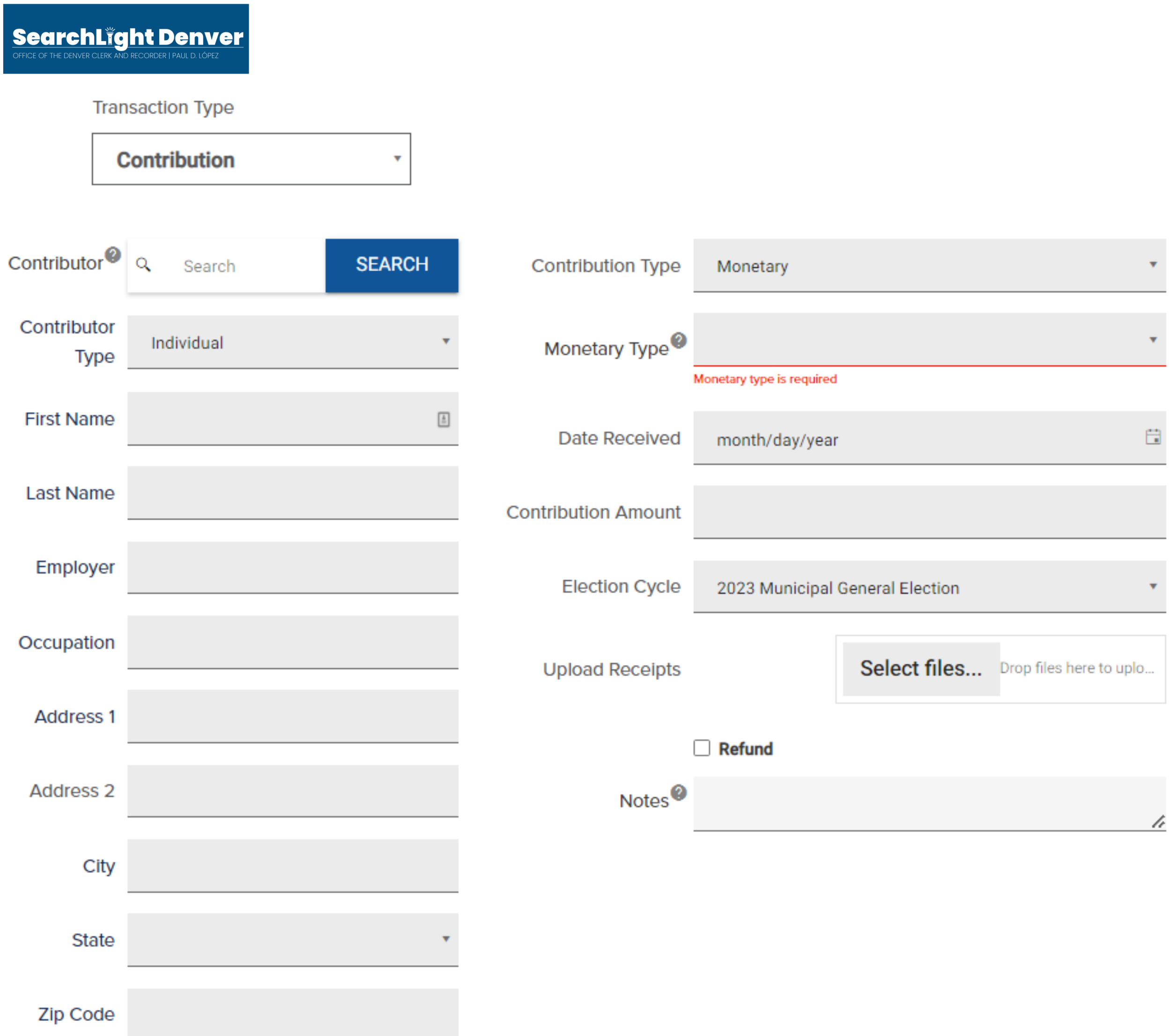



*Figure 33 Transaction Entry Form for Contributions*

**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.<br>*Only applicable to Monetary contributions* |
| 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.<br>*Only applicable to in-kind contributions* |

**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.

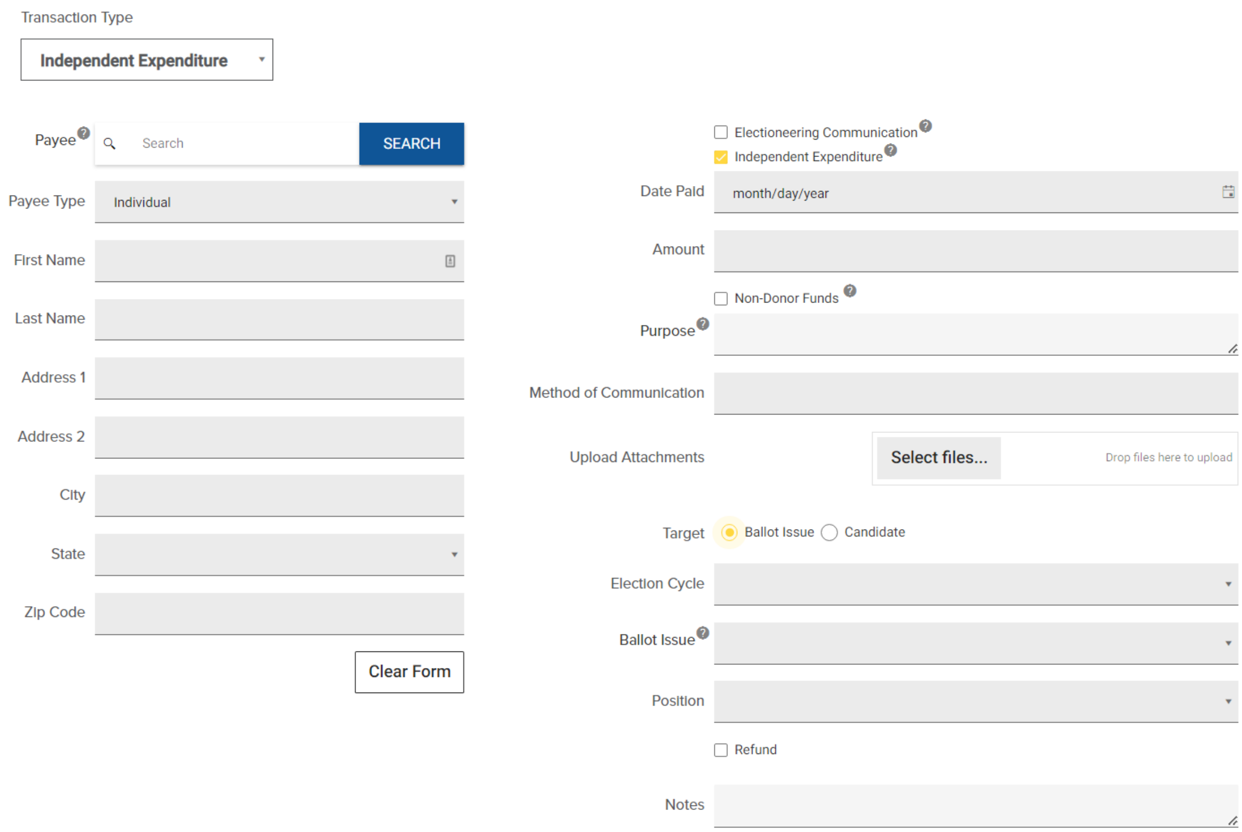



*Figure 34 Transaction Entry Form for an Independent Expenditure*

### 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.

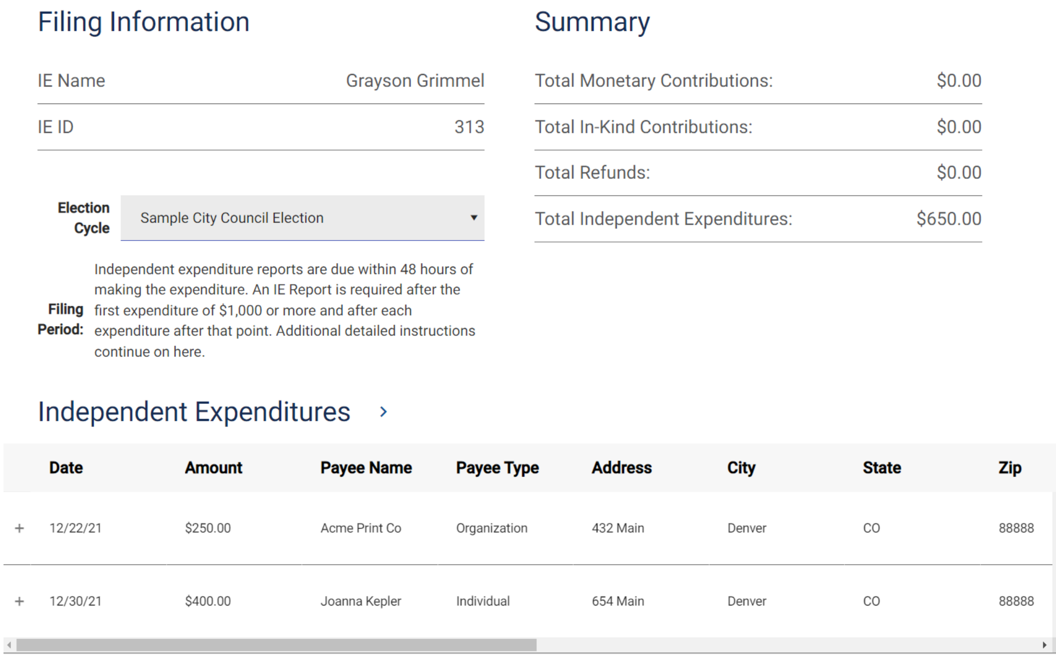



*Figure 35 Independent Expenditure Report*

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**.

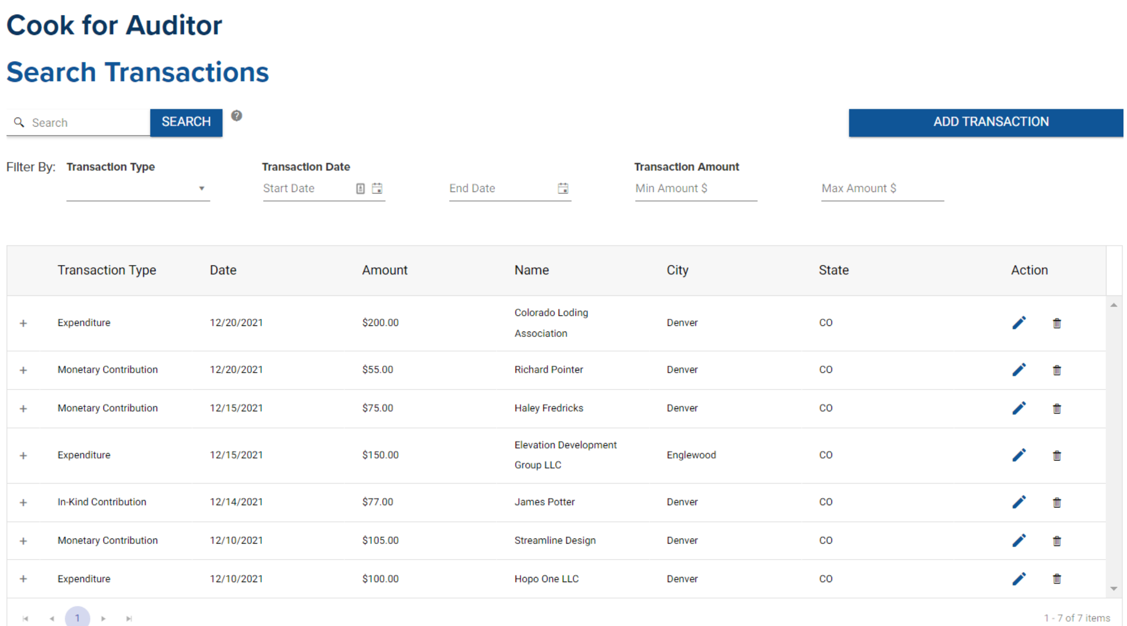



*Figure 36 Search Transactions*

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**.

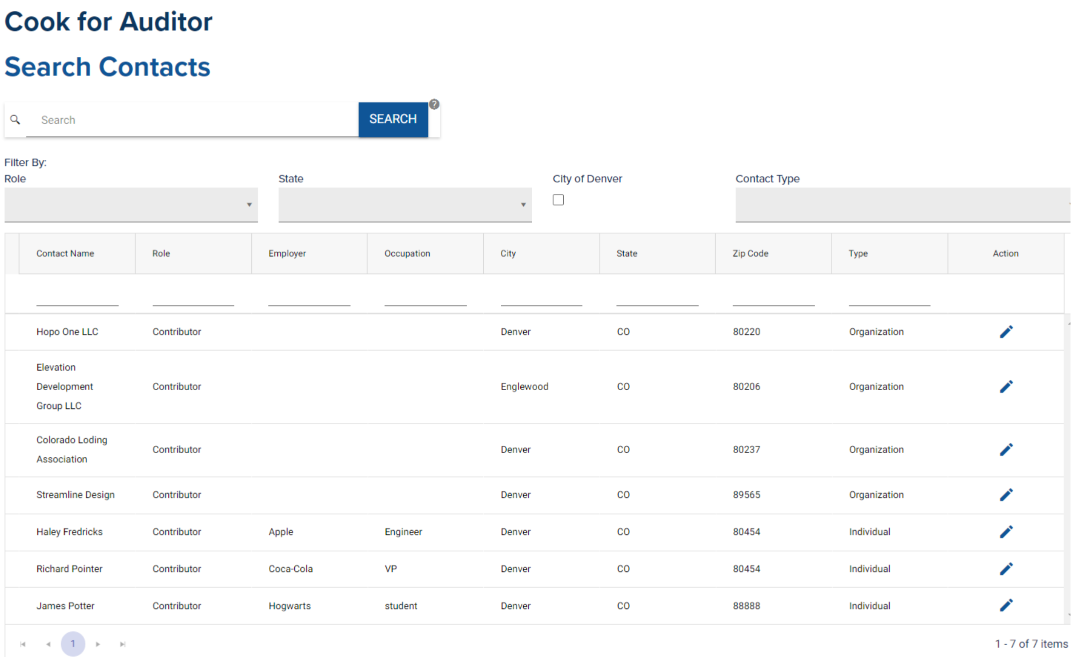



*Figure 37 Search Contacts*

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.

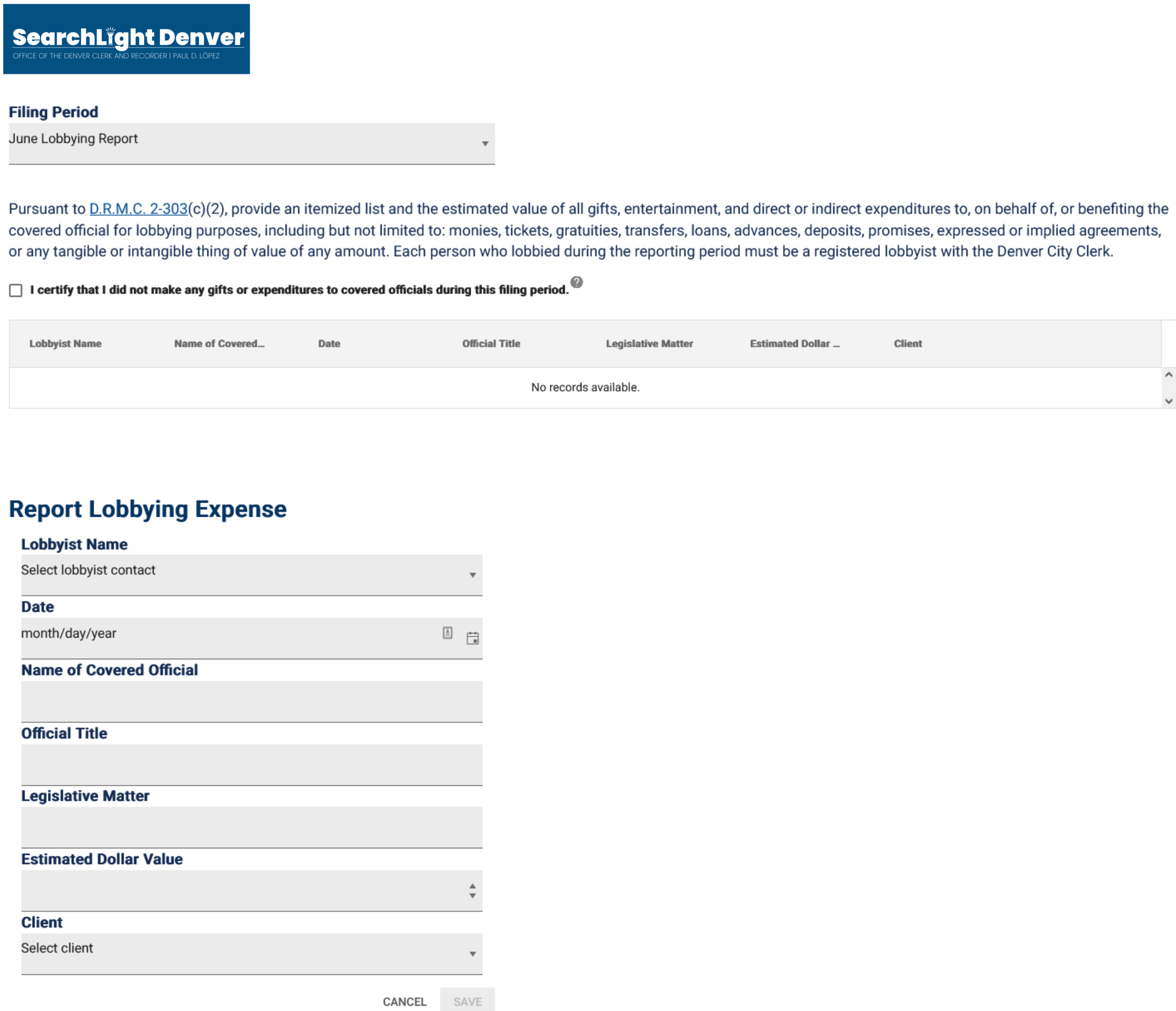



*Figure 38 Lobbying Report*

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**.