

Candidate Committee eFiler Manual *for Macomb County Registered Candidate Committees*

The Election Department of the Macomb County Clerk has adopted this eFiler Service to allow Candidate committees to electronically file required Campaign Finance reports.

Access to this system is via secure login only for authorized users of your committee. If you have not received an email at your committee's official email address with a link to your eFile account please contact the Macomb County Election Department at 586-469-5209 or send an email to: elections@macombgov.org.

Overview

The Macomb County eFiler Service is designed to allow you to enter your filing data into online forms resembling the paper and PDF forms you may have already used. Please refer to the Candidate Committee Manual found on the state's website for instructions regarding how to prepare your report in general or any individual schedule in particular. The link to that information is:

<https://mertsplus.com/mertsuserguide/index.php?n=MANUALS.CandStarted>

In addition to recording your data into the state required form, eFiler assists you by searching ahead, as you type, to offer matching contributors already in the system. It offers you suggested addresses as you type in information about new users. Best of all, it even helps to “do the math” when it comes to tracking and calculating various cumulative totals throughout the report.

First Time Users – even long time Treasurers

If you are logging in for the first time, it is unlikely that there is any data in the system for your committee and you will be starting with a Beginning Balance of \$0. If your committee has been filing paper statements for years, and you are now using the eFiling system, your beginning balance will be entered by the eFiling Administrator to get you started.

Important - You will need a copy of your previously filed report in order to have carry-over values such as the committee's previous amount of debt and cumulative numbers to enter on your first electronic filing.

Getting Started

Once you have been approved to use this system, an email will be sent to all authorized users of your committee. If you have not received this email, please check your 'spam' folder. The email will enable you to set your password and will contain the following link to login:

<https://campaignfinance.us/mi-macomb/efile>.

Note: Your email is not case sensitive and your password IS case sensitive.

Home Screen

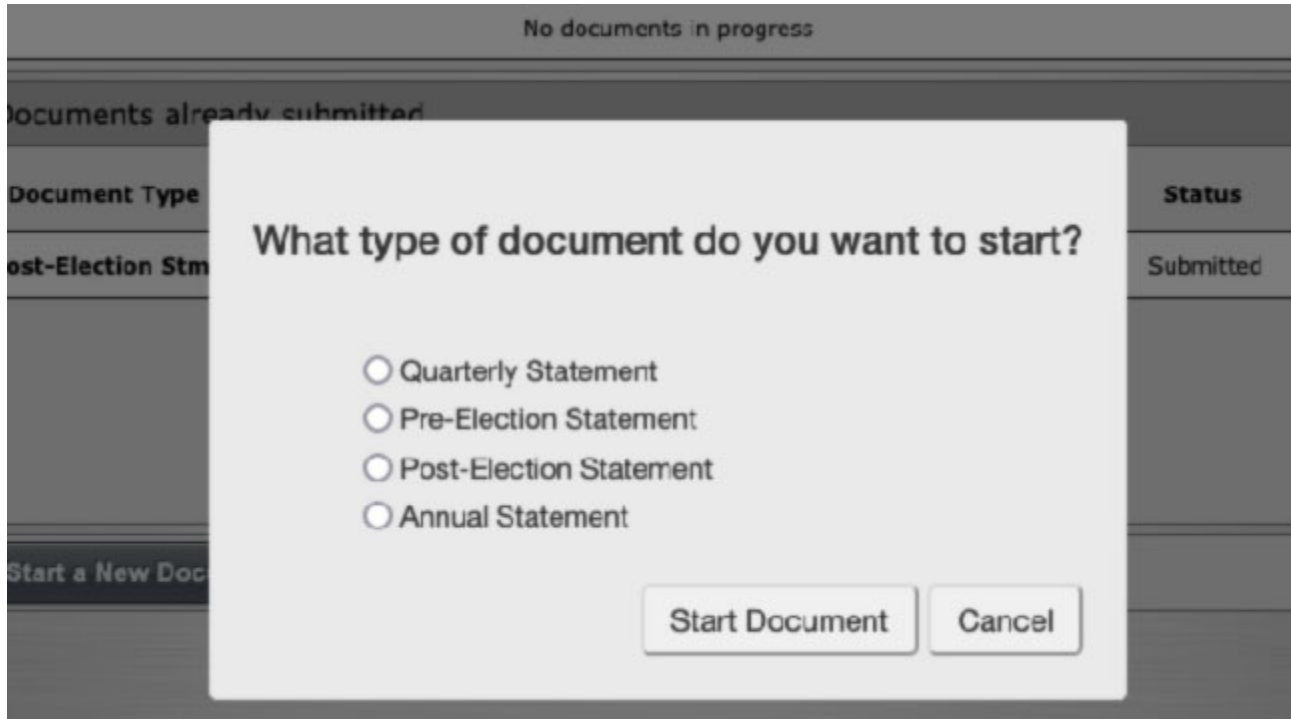
Following your successful login you will arrive at the eFile home page, which initially will not contain any documents and will look similar to this:

The screenshot shows the eFile home screen for Committee 20200096, ALANA FEIGENBAUM FOR TRUSTEE. The page is divided into two main sections. The top section, titled "Documents being worked on", has a table with columns for Document Type, Date Due, Date Modified, and Date Created. Below the table, it states "No documents in progress". The bottom section, titled "Documents already submitted", has a table with columns for Document Type, Date Due, Date Submitted, and Status. Below this table, it states "No submitted documents". At the bottom of the page, there is a button labeled "Start a New Document".

The home screen is divided into 2 sections. The **Top Section** is for “**Documents being worked on**” and the **Bottom Section** is where “**Documents already submitted**” to the Election Department appear. As you create new documents, edit, complete and eventually submit your completed report, these sections will list those documents both in progress or previously submitted.

Creating a New Filing

When you are ready to begin your filing, press the “Start a New Document” button at the bottom of the home page. You will see a pop-up window offering a choice of different filing documents you can create with the eFiler system.



Select the appropriate choice for the document you are creating and press “Start Document”. A new document will be created which will initially only consist of a Cover Page and Summary Page.

1. Select the Type of Statement you are creating
2. Identify the Reporting Period for which the Document is being Created.

Pre and Post Election Statements provide a list of recent elections to select from.

Summary Page

When opening the Summary Page you will be shown the current totals of all Schedules currently stored in this document and all previous “carried over” data from your committee's previous eFilings.

If this is your committee's first filing, your committee's previous totals will be \$0. If you previously filed a report on paper, the eFiling Administrator will have already entered the values from your previous paper filings in the appropriate entry box on the Summary Page. If this amount does not match your records, please contact our office.

Note: As you select and enter information on the applicable Schedules for your committee's activity, the Summary Page will populate that data making it unnecessary to fill in amounts. The only fillable lines on the Summary Page are for unitemized activity.

Adding Schedules

The next step is to add the schedules needed to complete your committee's report using the “Add New Schedule” button at the bottom left of the page.

Pressing the “Add New Schedule” button will open a window allowing you to check off one or more schedules you wish to add to your filing document. Press “Add Schedule(s)” and these documents will be added to the list that begins with just a Cover Page and a Summary Page.

The screenshot shows a web application interface for Committee 129258, titled "COMMITTEE TO ELECT STEPHEN WOODEN". The interface includes a "Logout" button in the top right corner. Below the header, there is a section titled "Quarterly Stmt (Jul) - 2020". A table displays the following data:

Section	# Entries	Modified	Created	
Cover Page	-	07/10/2021	07/10/2021	
Summary Page			21	

A modal dialog box is open in the center of the screen, titled "Which schedule(s) do you wish to add?". It contains a list of checkboxes for various schedules:

- Schedule 1A - Itemized Contributions
- Schedule 1A-1 - Itemized Other Receipts
- Schedule 1-IK - Itemized In-Kind Contributions
- Schedule 1B - Itemized Expenditures
- Schedule 1C - Itemized Office Expense Disbursements
- Schedule 1B-G - Get-Out-The-Vote Activities
- Schedule 1B-IK - Itemized In-Kind Expenditures
- Schedule 1E - Debts and Obligations
- Schedule 1F - Fund Raiser

At the bottom of the modal dialog, there are two buttons: "Add Schedule(s)" and "Cancel". In the background, an "Add New Schedule" button is visible at the bottom left, and a "document" button is visible at the bottom right.

Entering Data Quickly and Correctly

The eFiler Service strives to provide the ease of filling out a paper form with the error prevention and time saving capabilities of computer technology. The most visible example of this is seen while entering contribution and expenditure data.

This system uses the data that you enter to find the names of previous contributors or payees who have appeared in previous filings. Any matching contributors are presented for selection, eliminating the need to continue entering known data. Even when the data isn't known, the service checks the address being typed against public databases to help offer the user a list of easy to select choices of actual addresses, speeding data entry and eliminating incorrectly entered information. **Note:** Before selecting a name/address from the drop down menu, review it carefully to ensure you are choosing the correct person (Jr., II, III, etc.) and address (the city/state that matches your information).

Schedule 1A
Itemized Contributions

Contributor Name Person Organization/PAC

Last SMITH First RYAN M.I.

Mailing Address

Number / Street 1600 PEN

Line 2 1600 Pennsylvania Avenue Northwest Washington, DC, USA

Zip Code 1600 Pennsylvania Avenue Southeast Washington, DC, USA

City 1600 Peninsula Drive Erie, PA, USA

1600 Pennsylvania Avenue Ann Arbor, MI, USA

1600 Pennsylvania 315 Wilkes-Barre, PA, USA

powered by Google

Contribution Date (m/d/y)

Cumulative Amount 0.00

Type of Contribution Direct Loan from a person Fund Raiser

Whatever the data being entered, contribution or payment, each transaction is recorded separately. Each item is entered on a form and saved when the user presses save and an emptied form remains, ready for the next entry. This tool was designed with the idea that it can be used live, at a fundraiser, to record contributions as they're given.

Since eFiler is replicating a paper filing, the service is smart enough to:

- Carry over data from previous eFilings including
 - Loans, Bank Balances, Payables
 - Contributor and Vendor information
- Track Individual and PAC contributions throughout the cycle
- Organize items into proper formats
 - 4 contributions per page
 - 5 expenditures per page
- Subtotal each Page
- Total all Contributions or Expenditures
- Feed all Schedule Totals into the Summary Page (see note on page 4 for clarification)

Previewing Your Report

The eFiler Service stores all your submitted data in our database. The eFiler can also create the paper report, via PDF, as defined by law in the format that Michigan's County Clerks work with and present to the public.

If you wish to preview any "Yet to be Filed" documents, just press the preview button and a bar will appear on the screen indicating that the PDF to preview is being generated.

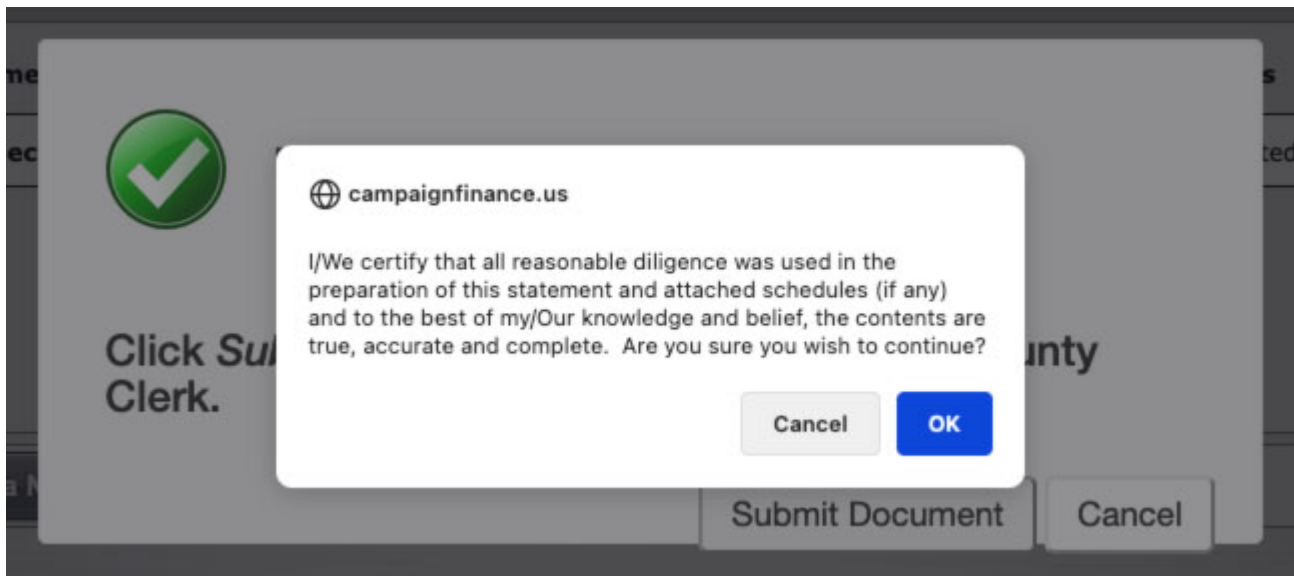
Note: The more pages in the document, the longer the system may take to generate the PDF for preview.

Completing and Submitting Your Document

Once all schedules have been completed and reviewed by you, after the Cover and Summary Pages are completed with carry over data added, if need be, it is time to submit your document. When reviewing, be sure to fix any of the errors the system warned about before submitting it to the Election Department. Ignoring these warnings could result in your committee receiving an Error and Omission on your submitted document.

There are two ways to submit your document. One way is to submit from the Home Page by choosing the arrow icon to the right of the document name. Users of eFiler can also submit from within the document by clicking on the Submit Document button on the bottom right of the screen. An attestation will appear requesting your consent that the information has been verified.

The following screenshot will be generated if you choose the second option to submit:



Submitting your document will have the effect of locking the document from editing. Your document will no longer appear in the "documents being worked on" portion of the screen, but only on the bottom under "Documents already submitted".

If you accept, click to confirm this is your committee's official submission. Your report is now submitted to our office with a timestamp of when you pressed submit.