Campaign Finance e-Filing Manual

for Macomb County Registered Candidate Committees

The e-filing system is designed to allow authorized users to enter data directly online rather than hand-filing paper forms or using a "fillable" PDF. Data entered in the e-filing system will be processed and reported on state-approved campaign finance forms, retained to help the committee populate future reports quickly, and will be easily searchable by the committee and the public.

The system also assists the user by searching ahead to offer matching contributors (previously entered) and suggests addresses for new contributors. The system will "do the math" when it comes to tracking and calculating various totals through the report. These new features will help reduce the amount of data entry required and help the committee keep accurate records.

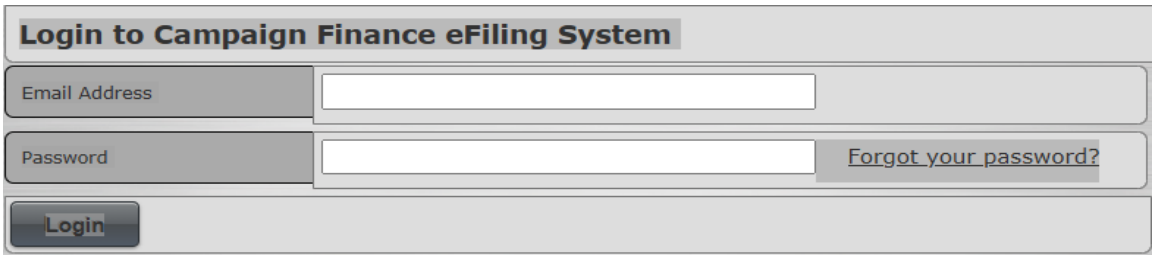
Please contact us at 586-469-5209 or elections@macombgov.org if you need a username and password. Access to this system is via secure login only for authorized users of your committee.

A Note for First Time Users

When logging in for the first time it is unlikely that there will be any data in the system for your committee. You will need your last previously filed report to enter certain data in your first report in the e-filing system. If you do not have this report, it can be found at macomb.mi.campaignfinance.us. Any debt owed by the committee will need to be added in the same manner it was incurred. Previous debt will only need to be added this initial time. Going forward, the schedule reporting committee debt will be included in all future filings.

Getting Started

Please visit https://CampaignFinance.US/MI-Macomb/eFile **to log in.**

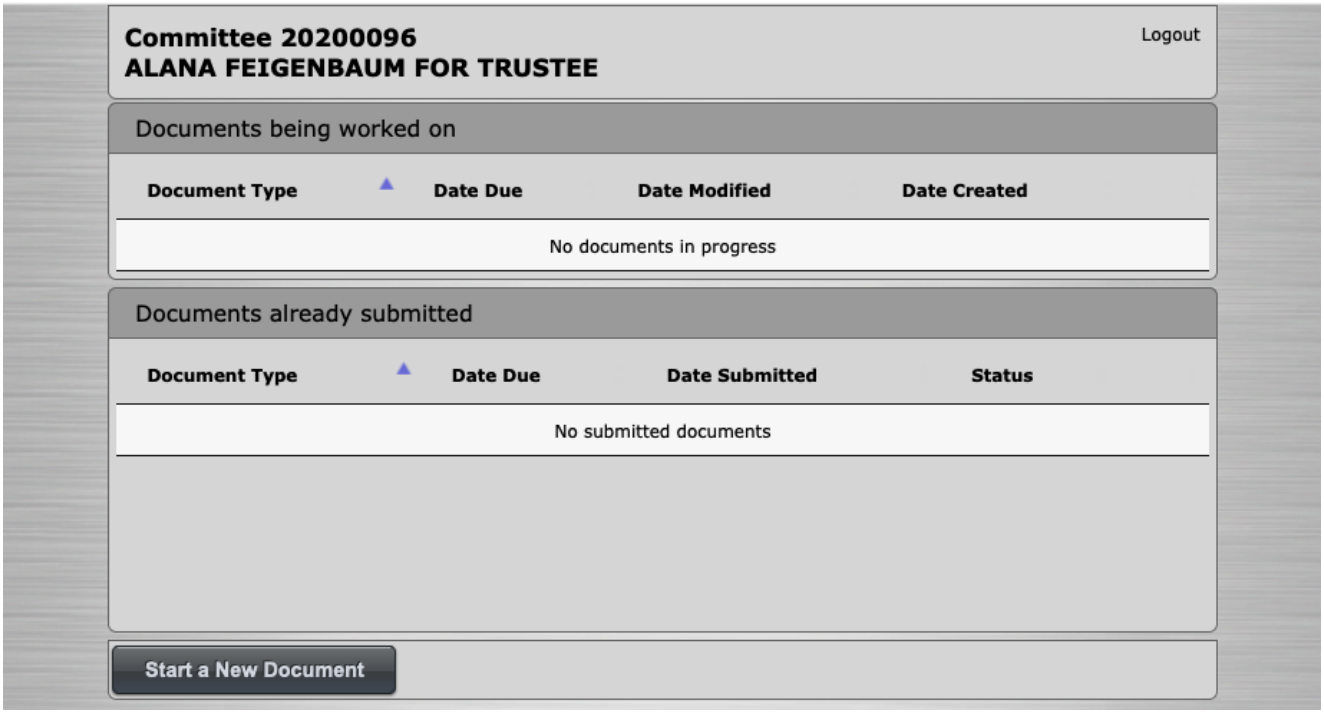


Once you have been approved to use this system, an email will be sent to all authorized users of your committee. If you have not received this email, please check your 'spam' folder. The email will enable you to set your password and will allow you to login.

Note: Your email **IS NOT** case sensitive and your password **IS** case sensitive.

Home Screen

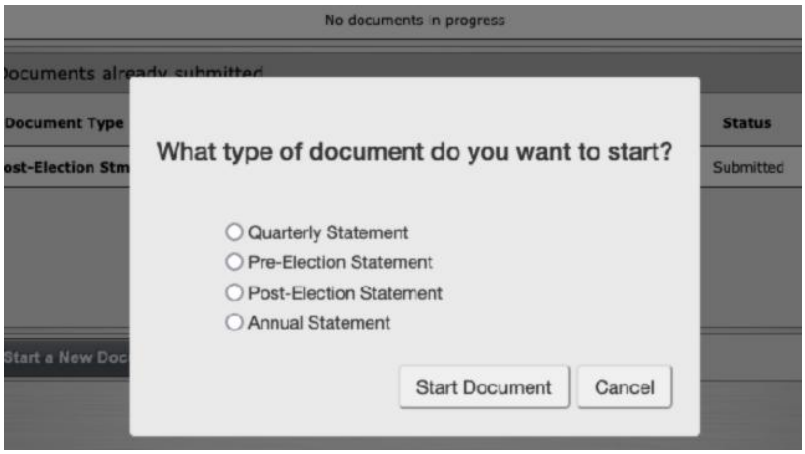
Following your successful login you will arrive at the e-filing home page, which initially will not contain any documents and will look similar to this:



The home screen is divided into two sections. The **Top Section** is for "**Documents being worked on**" and the **Bottom Section** is where "**Documents already submitted**" to the Election Department will 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.

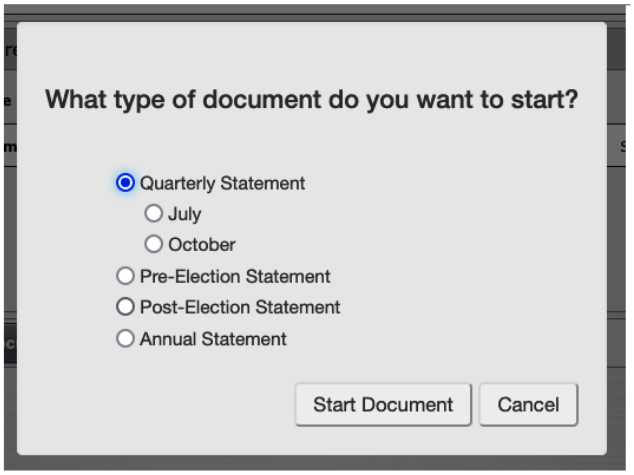
Creating a New Filing

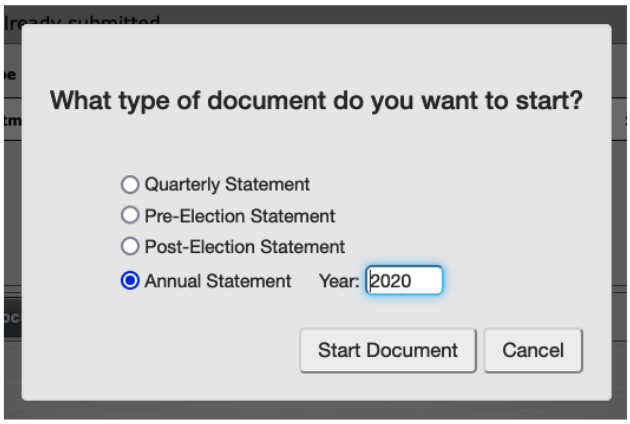
When you are ready to begin your filing, press the **"Start a New Document"** button at the bottom of the home page. You will see a pop-up window offering a choice of different filing documents.



Select the report you are creating and press "Start Document".

A new document will be created which consists of a Cover Page and Summary Page.

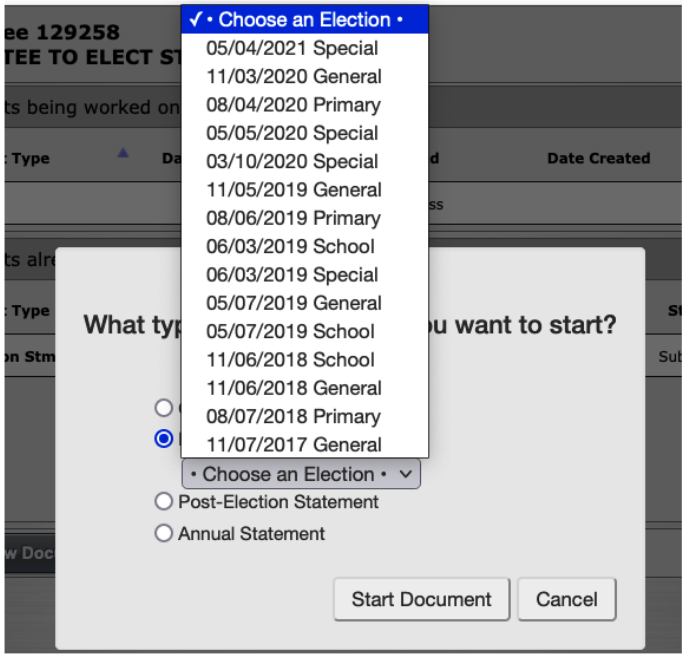




1. Select the Type of Statement you are creating

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 e-Filing.

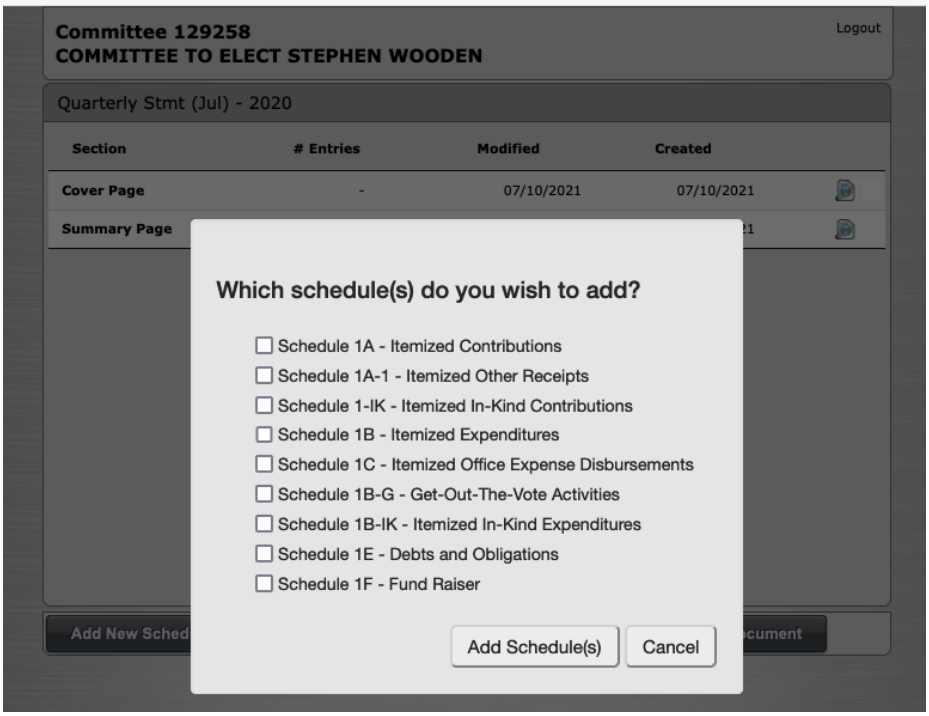
If this is your committee's first filing, your committee's previous totals will be $0. If you previously filed a report on paper, the e-Filing Administrator will have already entered the values from your previous paper filings in the appropriate entry box on the Summary Page. If this amount does not 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. Committees are **NOT** able to fill in the Summary Page. The only fillable lines on the Summary Page are for un-itemized activity.

Adding Schedules

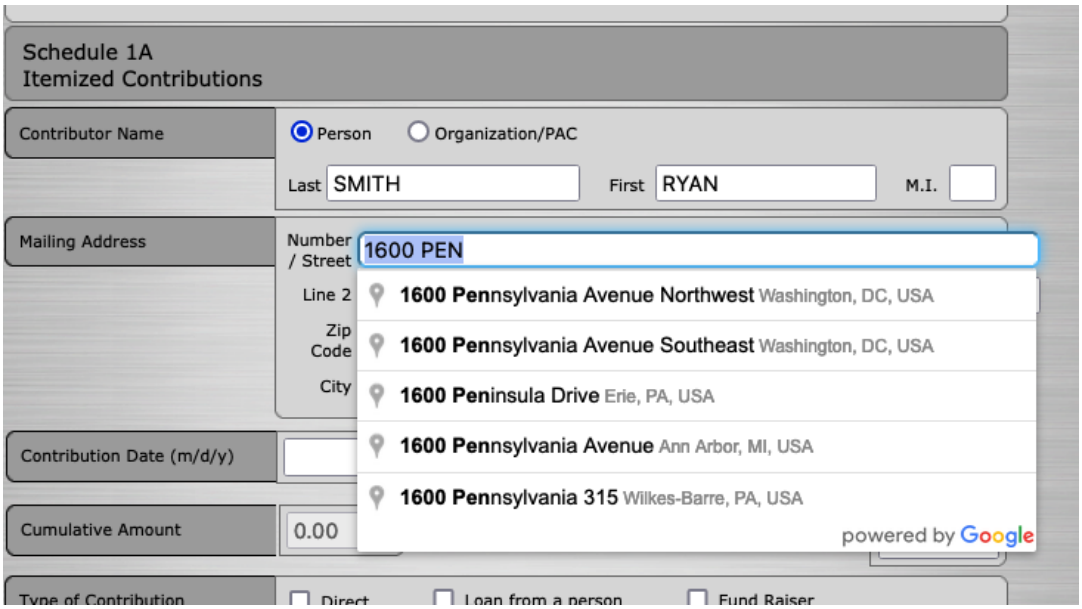
The next step is to add the schedules by using the "Add New Schedule" button at the bottom left of the page.

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. Once a Schedule is added you will be able to open it and start entering data.



Entering Data Quickly and Correctly

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. ***In order for the system to detect a match to previously entered data, it must be entered exactly as it was before – example Robert not Bob or with a middle initial or without.*** 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. ***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).



Since e-Filing is replicating a paper filing, the system is smart enough to:

- Carry over data from previous e-Filings 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 3 for clarification*)

Previewing Your Report

E-Filing stores all your submitted data in our database. The committee 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.

It is important to preview your documents prior to submission to confirm the information being submitted reflects your committee activity. Press the preview button and a report will be created as well as a link to a PDF that will be emailed to your login address when the report is complete.

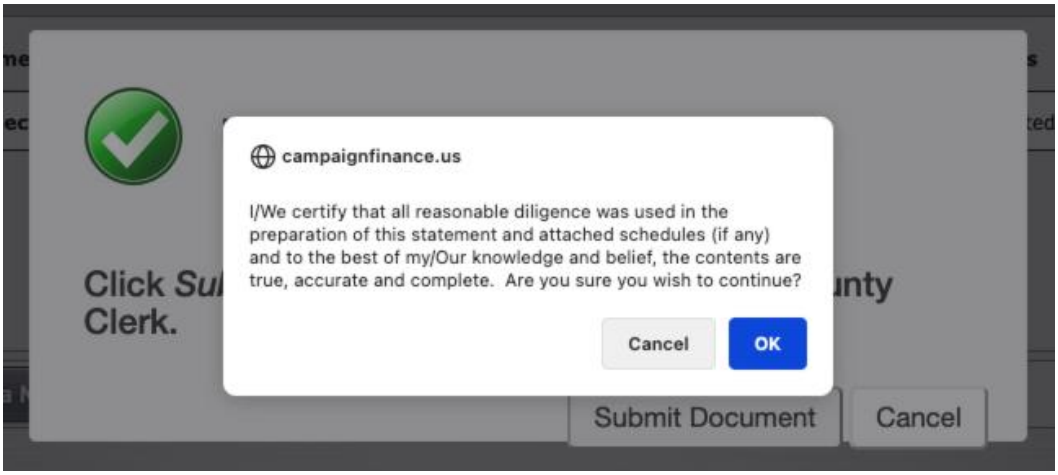
Note: The more pages in the document, the longer the system may take to generate the PDF for preview.

Completing, Validating 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 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.

Amending a Document Already Submitted

If it is necessary to make changes to a document already submitted either in response to an Error & Omission or to changes in information is later discovered. Under the “Statements Already Submitted” section, simply choose the box with the pencil on the right that indicates “amend statement”. Changes to any of the Schedules can be made. The committee would then follow the process to submit the statement.