#### **CITY OF PHILADELPHIA**



# How To Use Philadelphia's CAMPAIGN FINANCE Filing System



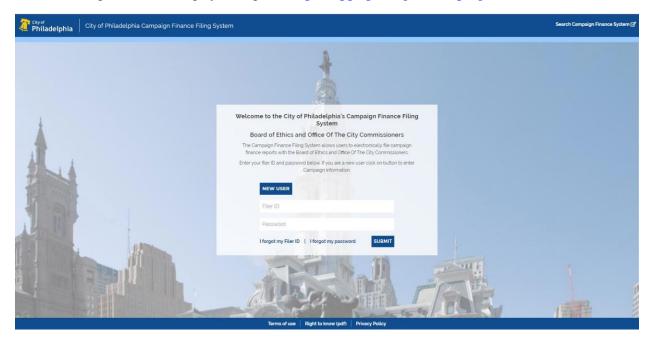
Philadelphia Board of Ethics 1515 Arch St., 18<sup>th</sup> Floor Philadelphia, PA 19102 (215) 686-9450 www.phila.gov/ethicsboard Office of the City Commissioners City Hall, Room 142 Philadelphia, PA 19107 (215) 686-3469 www.philadelphiavotes.com

campaign.finance@phila.gov

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In order to log onto the filing system go to <a href="https://apps.phila.gov/campaign-finance/auth/">https://apps.phila.gov/campaign-finance/auth/</a>

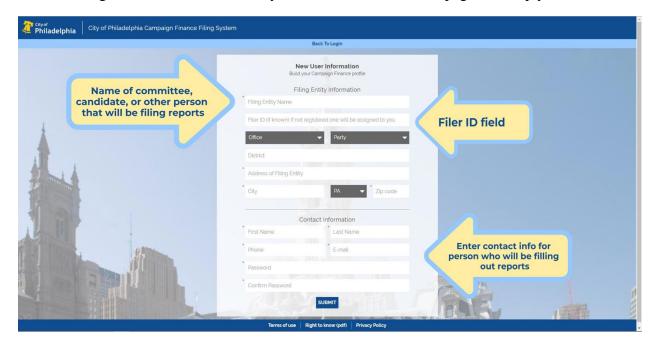


If you have not created an account, click the "New User" button.

Note: Accounts for the prior filing system did not transfer to the new system. Users who had an account under the old system will have to reestablish their account. You can reuse your old Filer ID Number if you choose.

If you have already created an account, enter the filer ID and password and login.

After clicking the "New User" button, you will be directed to this page to set up you account:



Enter all of the requested information. If you have a filer ID number from the prior City system or from the Department of State, please enter it in the relevant box. If you don't have a filer ID number, leave the box empty and the system will automatically assign a new number to you.

The contact information should be for the person who will actually be submitting reports on behalf of the filing entity.

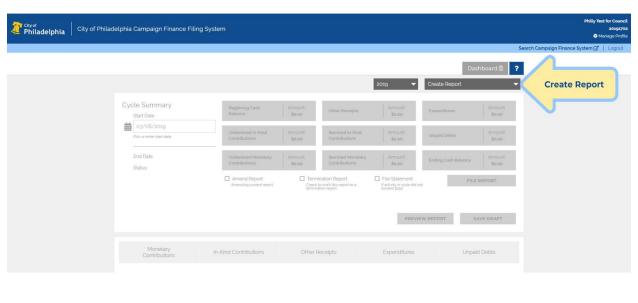
Note: Sometimes the state drop down gets stuck. If this happens, refresh the page and re-enter your information.

After you submit your account information, you will get an email providing your Filer ID Number and a link to verify your account.

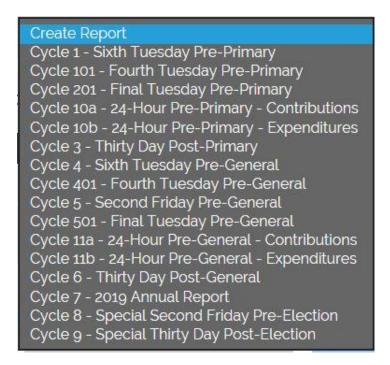




When you log into the system for the first time after setting up your account, you will be directed to this page:



Click the "Create Report" drop down menu and choose which report you would like to create. Once the report is created you can begin entering transactions.



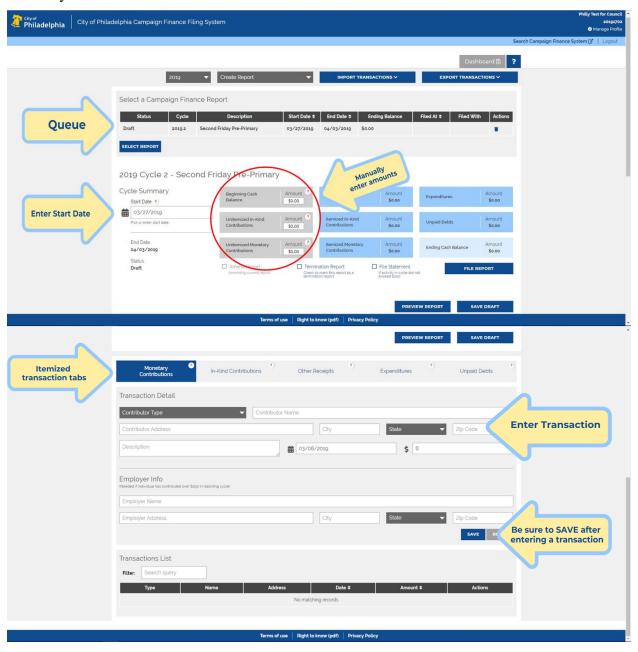




The queue at the top of the page shows any reports you have filed or are currently working on.

Be sure to enter the correct start date. For the first report you file in a calendar year, the start date is January 1<sup>st</sup> of that year. For each subsequent report, the start date is the day after the close of the last report you filed. You can find the filing schedule <u>here</u>.

You will have to manually enter your beginning cash balance as well as any unitemized monetary or in-kind contributions.

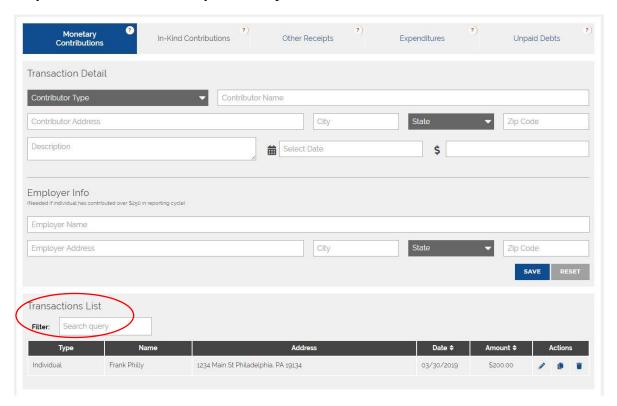




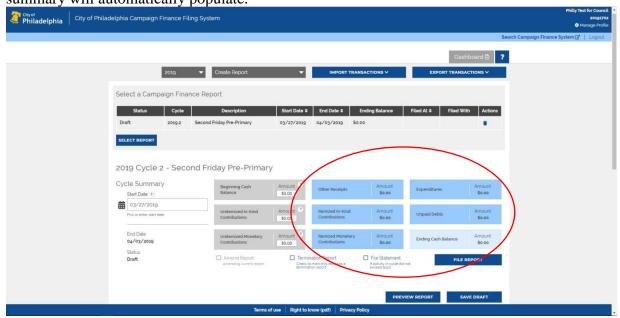


Use the five tabs to enter your itemized transactions (monetary contributions, in-kind contributions, expenditures, debts, and other receipts).

As you enter transactions, they will fill up the transactions list for that tab.



As you enter contributions, expenditures, and other transactions, the fields in blue in the cycle summary will automatically populate.

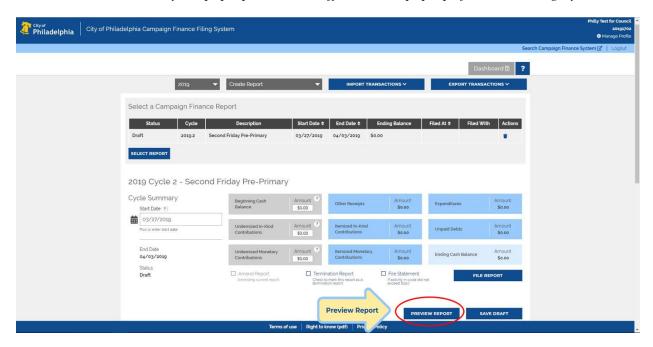


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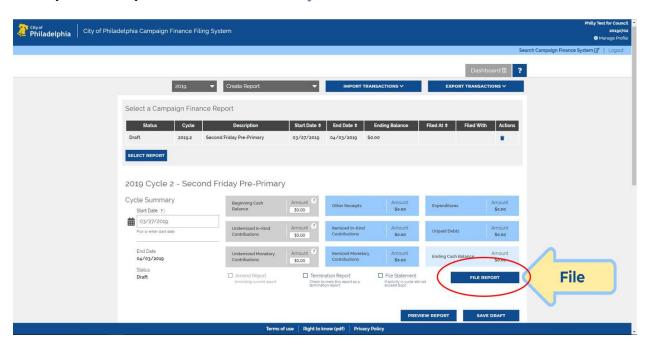


Once you have entered all of your transactions, carefully review the report. If you wish, you can generate a PDF of the report prior to filing by clicking the "Preview Report" button.

Note: Please make sure your pop-up blocker is off or allows pop-ups from the Filing System.



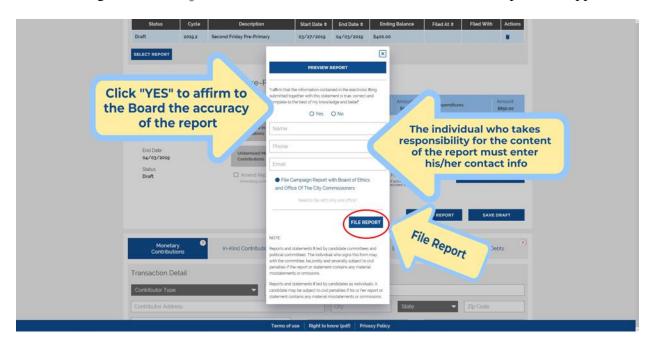
When you are ready to file, click the "File Report" button.







After clicking the "File Report" button, the electronic certification for the report will appear.



After completing the electronic certification and clicking the "File Report" button you will receive a confirmation email.

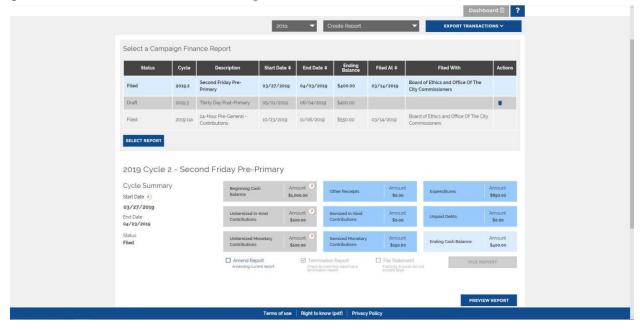
This email confirms that on 03/14/2019 at 10:37 AM EST, you electronically submitted a 2019 Second Friday Pre-Primary campaign finance report to the Philadelphia Board of Ethics and Office of City Commissioners. Please print this email for your records.

If you believe you received this email in error please contact <a href="mailto:campaign.finance@phila.gov">campaign.finance@phila.gov</a> or call Board of Ethics at (215) 686-9450 or City Commissioners at (215) 686-3469 for assistance.

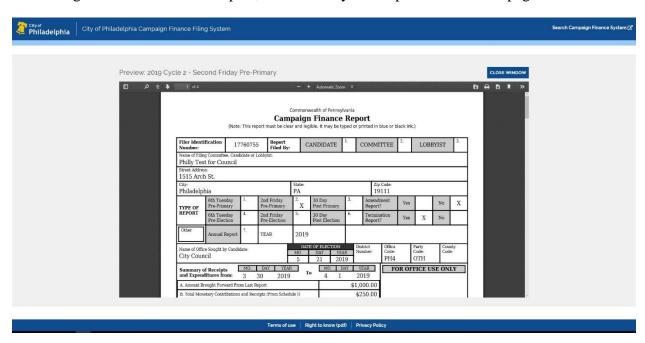
The filing system allows you to electronically submit campaign finance reports to both the Board of Ethics and the Office of the City Commissioners. When you fill out the electronic certification and click "File Report" your filing with the Board of Ethics will be complete and you will receive the confirmation email.



To complete your filing with the City Commissioners, you will need to print the first page of the report, sign, and have it notarized. You must deliver the signed and notarized cover page to City Hall, Room 142. In order to print the first page of the report, select the report in the queue and then click the "Preview Report" button.



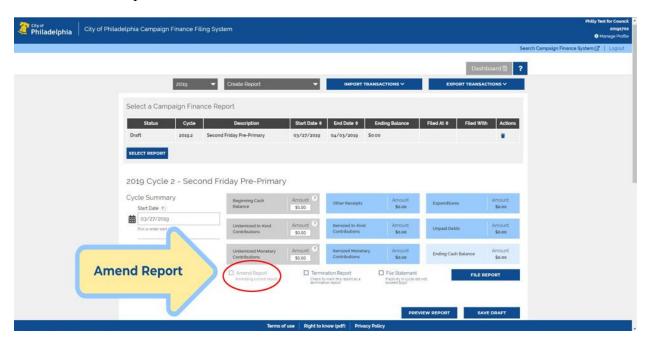
This will generate a PDF of the report, from which you can print out the first page.



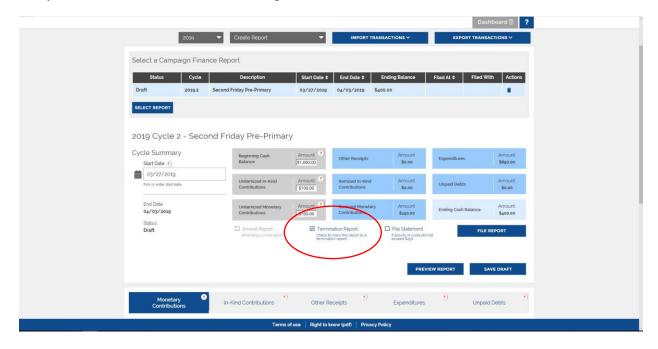




If you need to file an amended report, click the "Amend Report" box and the system will create a draft amended report.



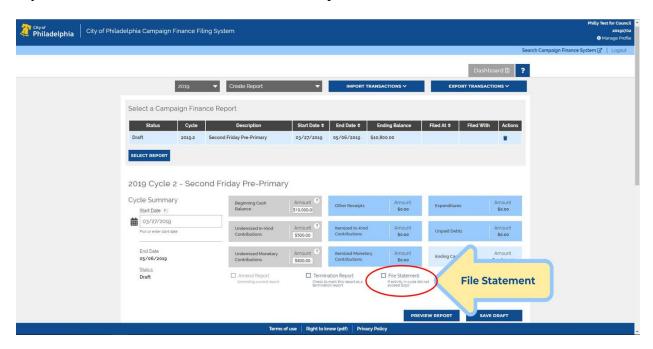
If you need to file a termination report, click the "Termination Report" box prior to filing and the system will mark it as termination report.





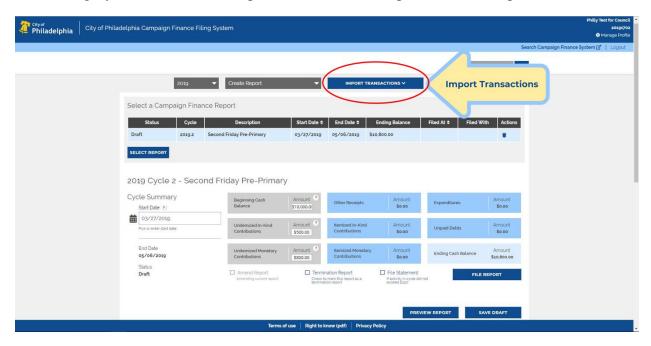


If you need to file a statement instead of a full report, click the "File Statement" box

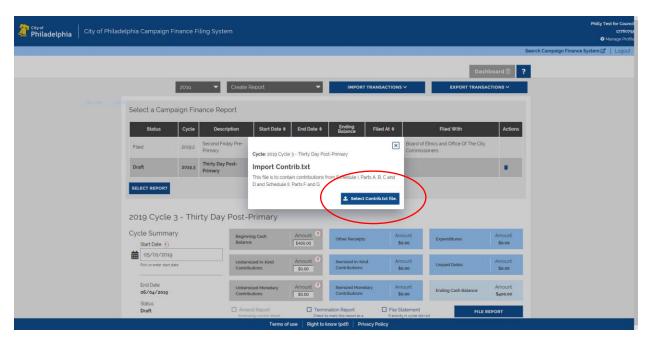


Clicking the File Statement box will close all of the transaction tabs. You will enter your Beginning and Ending Cash Balances, Unitemized monetary, and in-kind contributions, and any Debts.

Campaign Finance transactions can be imported to a selected campaign finance report from text files in the appropriate format. Click on the "Import Transactions" drop down menu and select which category of transactions to import (Contributions, Expenditures, Receipts, or Debt).

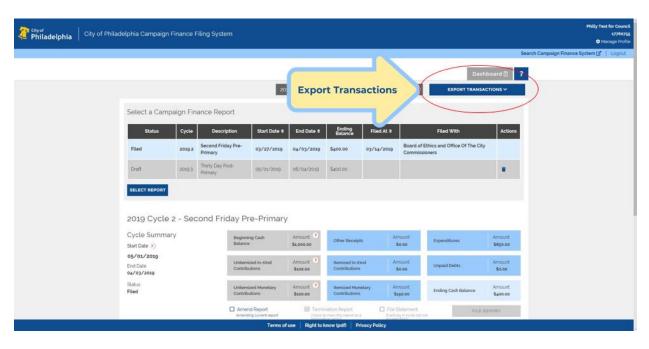


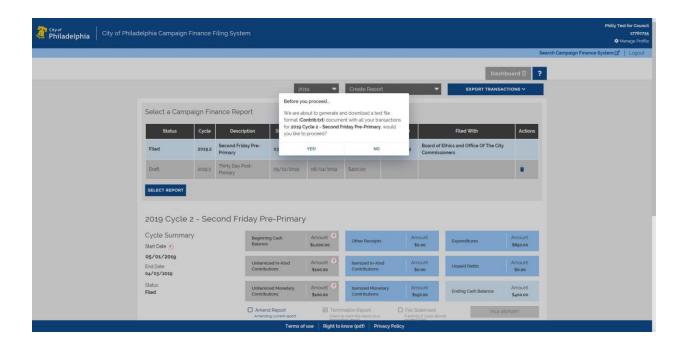
Select the appropriate file from your computer. Only one category may be imported at a time. After the category is imported they will populate the appropriate tab.





Campaign Finance transactions can be exported from a selected campaign finance report as text files in a state-compliant format. Click on the "Export Transactions" drop down menu and select which category of transactions to export (Contributions, Expenditures, Receipts, or Debt). Then select the folder on your computer to place them. Only one category may be exported at a time.





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## **Questions?**

### Contact us at:

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