## **SOP: Submitting a PA Campaign Finance Report On-Line**

DRAFT 07 December 2022

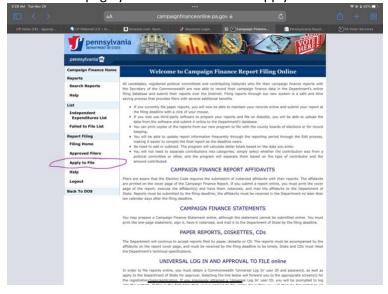
## **Know these things:**

 Candidates and Campaign Committees both need to submit finance reports. Even if you don't spend \$250 or more, there are still documents that must be submitted to the state in compliance with the reporting deadlines.

## **Overview of Steps in this Process:**

- 1) Establish your Keystone Login
- 2) Apply to File for your campaign in the Campaign Finance Online portal
- 3) Create a campaign finance report
- 4) Submit a campaign finance report
- 1) Establish your Keystone Login
  - a. https://keystonelogin.pa.gov/
  - b. This is the system that manages login profiles for on-line systems such as the campaign finance reporting.
- 2) Apply to File for your campaign in the Campaign Finance Online portal
  - a. Login using the username and password set up at the Keystone Login site
  - b. https://www.campaignfinanceonline.pa.gov/Pages/Login.aspx
  - c. You must complete this step whether you're filing on behalf of a campaign finance committee or if you are a candidate filing a report on behalf of yourself
  - d. STEPS TO FOLLOW:

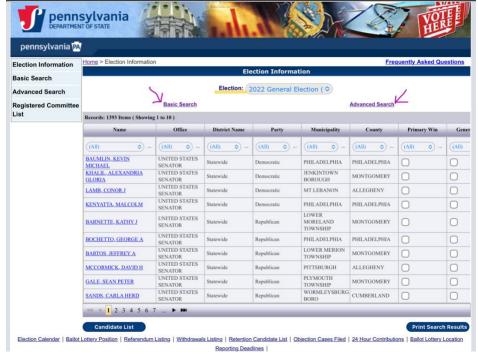
i. On the homepage you'll want to click on "apply to file".



ii. You'll be asked to provide the "Filer ID" of the entity on behalf of which you wish to submit finance reports



iii. You probably have the Filer ID somewhere in documents verifying receipt of candidate or committee filings; but it's easily obtained from this site <a href="https://www.pavoterservices.pa.gov/ElectionInfo/electioninfo.aspx">https://www.pavoterservices.pa.gov/ElectionInfo/electioninfo.aspx</a> Navigate to the Election Information site, make sure you've selected the applicable election, and use Basic or Advanced search options to locate the profile (candidate and/or committee) on behalf of which you want to submit finance reports.



Here's a

peak at the options in the advanced search window:



you locate the entity you're looking for in your search results, just click on the name



"filer ID" that you're looking for is called the Candidate ID:



Committee ID:

The



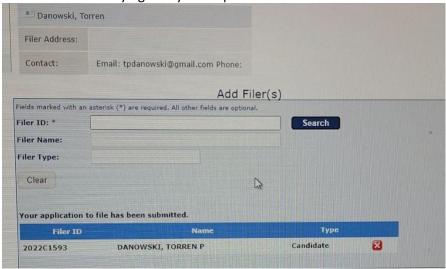
you go back to the Report Filer Registration screen on the Campaign Finance page, enter the Filer ID# (Candidate or Committee ID from the Election Information page) and click Search, you should see the name associated with that ID populate, if it's correct then

you click on "Apply to File"

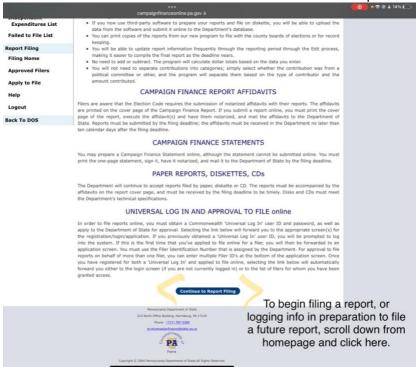


You should then see a

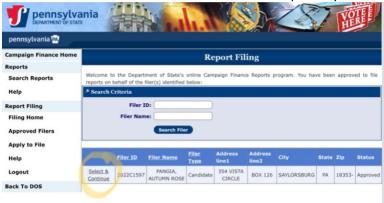
screen like this verifying that your request to file has been submitted



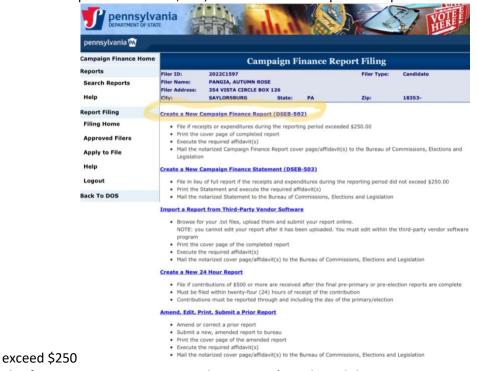
- iv. You will receive automated e-mails from PA campaign finance verifying that the request was received and that the request was approved.
- 3) Create a campaign finance report:
  - a. It's advisable that you create a draft report of your first report early. You can save the draft without submitting, it is relatively easy to add expenses and donations as they arise and advisable not to leave everything until the last minute when you may experience unanticipated technical difficulties.
  - b. The website will time out and you will lose your information if you haven't saved the report, so be sure to save periodically (see step xii).
  - c. STEPS TO FOLLOW:
    - Login on the Campaign Finance Reporting site https://www.campaignfinanceonline.pa.gov/Pages/Login.aspx
    - ii. Scroll down on the home screen and click on "Continue to Report Filing"



iii. The next screen will show you all of the ID's this login profile is authorized to file reports for, you may have more than one if you are filing on behalf of both the candidate and their committee. Click Select & Continue for the profile you are creating a report for.



iv. Select the applicable report type; your first report will most likely be DSEB-502 if you've received or spent more than \$250, or DSEB-503 if receipts and expenditures didn't



v. This first screen is very important, be sure you've selected the correct parameters in all of the highlighted sections. The Report Date From should be no later than your oldest reportable donation or expense. The Unitemized Contributions are where you add a tally of any donations worth \$50 or less which you are not including on the report as a separate contribution with donor details. So keep in mind that donations of \$50 or less

either get added here, or can be included in the report with full details if you wish, not

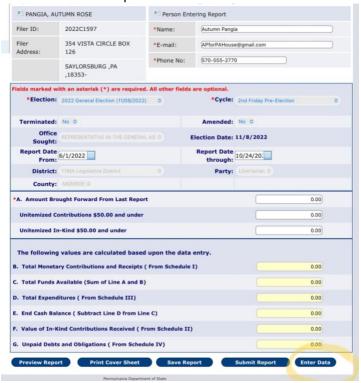
	campaignfinanceonlin Filer Informa		Report Co	over Page	
reports online to considered filed requires the su Campaign Fina affidavit(s) and the filing deadl deadline.	o the Department of State prior to con the date they are electronical bmission of notarized affidavits nce Report. If you submit a rep have them notarized, and mail to ine; the affidavits must be recei	to the filing deally received by with their report online, yo the affidavits to ved in the Dep	adline. All suppor the department orts. The affidav u must print the the Department	e reporting period. You may then su ting Schedules and subsequent Part t. Filers are aware that the Election its are printed on the cover page of e cover page of the report, execut t of State. Reports must be submitter than ten calendar days after the	code f the the d by
	must be mailed or delivered in p State, Bureau of Elections, 210 N		lding, Harrisburg	, PA 17120-0029	
PANGIA, AL	JTUMN ROSE	Person Er	ntering Report		
Filer ID:	2022C1597	*Name:	Autumn Pang	ia	
Filer Address:	354 VISTA CIRCLE BOX 126	*E-mail:	APforPAHouse@gmail.com		
	SAYLORSBURG ,PA ,18353-	*Phone No:	570-555-277	0	
	rith an asterisk (*) are required. 2022 General Election (11/08/2022)	All other field		2nd Friday Pre-Election	0
	2022 General Election (11/08/2022)				0
*Election:	2022 General Election (11/08/2022)  No ◆  REPRESENTATIVE IN THE GENERAL		*Cycle:	No ≎	
*Election: Terminated: Office Sought:	2022 General Election (11/08/2022)  No ◆  REPRESENTATIVE IN THE GENERAL		*Cycle:	No ©	
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*Election: Terminated: Office Sought: Report Date From: District:	2022 General Election (11/08/2022)  No ©  REPRESENTATIVE IN THE GENERAL  6/1/2022		*Cycle:  Amended:  Election Date:  Report Date through:	No ≎ 11/8/2022 6/2/2022 □	
*Election: Terminated: Office Sought: Report Date From: District: County:	2022 General Election (11/08/2022)  No  REPRESENTATIVE IN THE GENERAL  6/1/2022  178th Legislative District	AS O	*Cycle:  Amended:  Election Date:  Report Date through:	No ≎ 11/8/2022 6/2/2022 □	
*Election:  Terminated:  Office Sought:  Report Date From: District: County:	2022 General Election (11/08/2022)  No ©  REPRESENTATIVE IN THE GENERAL  6/1/2022  176th Legislative District  MONROE ©	AS O	*Cycle:  Amended:  Election Date:  Report Date through:	No ©  11/8/2022  6/2/2022  Libertarian ©	

both. Click on "Show

Summary" to advance to the next screen and enter more expenditures and receipts.

\*\*Note that the "Cycle" report automatically selected, may not be correct, don't assume and examine all the details on this page before proceeding.

vi. You can just click Save Report now if you want to come back and add details later. Click Enter Data to add expenditure and contribution details.



vii. The first think you need to do is identify the type of data you are entering from this drop-down menu:

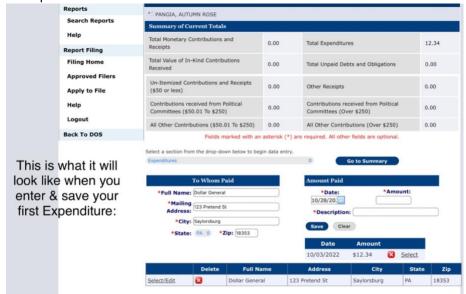


Drop-down menu items are:

- 1. Part A/C Contributions Received from Political Committees
- 2. Part B/D Other Contributions
- 3. Part E Other Receipts
- 4. Part F/G In-Kind Contributions Received
- 5. Expenditures

## 6. Unpaid Debts

viii. This example demonstrates adding two expenditures for the same "To Whom Paid" entity; the principles apply generally the same for all data entry category items. Enter all required details and click Save:



Then

add the date/amount/description of another expenditure made to that same entity:

This is w	hat it looks	Expenditures	n the drop-do	own below to begin data		Smount Paid	Go to Summa	iry		
a se	n you enter econd ture for the "to whom	Address:	123 Pretend			*Date: 10/28/20: *Description		*Ame	ount:	
	aid"					Date	Amount			
P	aiu				1	10/03/2022	\$12.34	×	Select	
					(	09/09/2022	\$15.99	×	Select	
To enter	for another		Delete	Full Name		Address	City	,	State	
"to whom	n paid," you	Select/Edit	8	Dollar General	123 Pre	etend St	Saylorsbur	9	PA	183
	lick CLEAR	Populate the re City, State, and Zi		in the To Whom Paid	area with ti	ne recipient's ir	oformation (fo	r exam	nple: Name,	Addri

ix. You must click "CLEAR" if you wish to enter expenditures or contributions from a new entity. If you simply change the entity info and click save, you will be changing the entity info for all of the listed expenditures.



x. Once you've created a profile for an entity, you'll only need to select them from the list to add more expenditures or receipts associated with the entity:



xi. As already mentioned, the function is very similar when entering contributions.



The advice

given here about Retired donors is only based on experience with past submissions which haven't been called out as erroneous.

pennsylvania 🕅 Data Entry [Filer: 2022C1597 / Report: 6/1/2022 - 10/24/2022] Search Reports Report Filing Filing Home 0.00 **Approved Filers** Apply to File Contributions received from Pol Committees (\$50.01 To \$250) Logout All Other Contributions (\$50.01 To \$250) 0.00 Back To DOS Out-of-Country : City: And then click on "Save Report" Election Date: 11/8/2022 Save the report and Report Date through: 10/24/20. come back to work on it anytime. Click "Preview Report" anytime to see what the submission will look like in its current state. Total Funds Available (Sum of Line A and B) enditures ( From Schedule III)

xii. When you're done entering data for the session, click on "Go To Summary"

xiii. This is what your available reports will look like. To add more line items to a "Saved/Incomplete Report" simply click on the "Edit" option



- 4) Submit a campaign finance report
  - a. You no longer need to get your campaign finance report notarized and mailed in separately. As detailed in this memo
    - (https://www.dos.pa.gov/VotingElections/CandidatesCommittees/CampaignFinance/Document s/1-22-21-Final-Act%202020-15.pdf) you can submit the cover page of your finance report electronically.
  - b. You must also send the corresponding version of the unsworn declaration form, for some reason there is no link to where those forms can be found in the state's memo; you will find it here: https://www.dos.pa.gov/VotingElections/CandidatesCommittees/CampaignFinance/Pages/Uns worn%20Statements.aspx

- c. As a matter of quick reference, <u>ra-stcampaignfinance@pa.gov</u> Is the e-mail address where you must send your cover page and unsworn declaration form.
- d. STEPS TO FOLLOW:
  - i. When in the view of Editing the report you want to submit, click "Submit Report"

Unitemized In-Kind \$50.00 and under	0.00
The following values are calculated based upon the data entry.	
B. Total Monetary Contributions and Receipts ( From Schedule I)	0.00
C. Total Funds Available (Sum of Line A and B)	0.00
D. Total Expenditures ( From Schedule III)	35.32
E. End Cash Balance ( Subtract Line D from Line C)	-35.32
F. Value of In-Kind Contributions Received ( From Schedule II)	0.00
G. Unpaid Debts and Obligations ( From Schedule IV)	0.00

ii. Then select "Print Cover Sheet"

Unitemized In-Kind \$50.00 and under	0.00
The following values are calculated based upon the data entry.	
3. Total Monetary Contributions and Receipts ( From Schedule I)	
C. Total Funds Available (Sum of Line A and B)	
D. Total Expenditures ( From Schedule III)	4,420.10
E. End Cash Balance ( Subtract Line D from Line C)	
F. Value of In-Kind Contributions Received ( From Schedule II)	
G. Unpaid Debts and Obligations ( From Schedule IV)	

- iii. If you cannot print the cover sheet, you can always choose to save the entire report, the cover sheet is just the first page of the file.
- iv. You don't have to print and sign and scan the cover sheet, we've had success so far with electronically signing the document

			AFFIDAVIT SEC	CTION	
PART I - If this is a Cor	nmittee report	t, treasurer si	gn here. If this is a Can	didate report, cancidate	sign here.
I swear (or affirm) that the correct and complete.  Sworn to and subscribed in the complete in the complete in the correct and cor		ling the attached	I schedules filed on paper o	AP	the best of my knowledge and belief , tru
day o	of	20		///	n Pangia
My Commission Expires	Signature			AJPangia@ 570-350-	0
	мо				A O PRESIDENCE AND A CONTRACTOR AND A CO
Part II- If this is a rep		DAY date's authoriz	YR zed Committee, Candida	Area Code te shall sign here.	Daytime Telephone Number
I swear (or affirm) that to No 320) as amended.	ort of a candid	date's authoriz	zed Committee, Candida	te shall sign here.	
I swear (or affirm) that to	ort of a candid the best of my efore me this	date's authoriz	zed Committee, Candida	te shall sign here.	Daytime Telephone Number visions of the act of June 3,1937 (P.L. 1333
I swear (or affirm) that to No 320) as amended. Sworn to and subscribed b	ort of a candid the best of my efore me this	date's authoriz	zed Committee, Candida	te shall sign here.	visions of the act of June 3,1937 (P.L. 1333
I swear (or affirm) that to No 320) as amended. Sworn to and subscribed b	ort of a candid the best of my efore me this	date's authoriz	zed Committee, Candida	te shall sign here.	visions of the act of June 3,1937 (P.L. 133:

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- v. Download the appropriate Unsworn Declaration and sign that also https://www.dos.pa.gov/VotingElections/CandidatesCommittees/CampaignFinance/Pages/Unsworn%20Statements.aspx
- vi. Send an e-mail to <a href="mailto:ra-stcampaignfinance@pa.gov">ra-stcampaignfinance@pa.gov</a>, attach the signed copies of the submitted Finance Report Cover Sheet and Unsworn Declaration. There is no suggest

subject to use for this e-mail, but it's advised to use the candidate or committee name and the filing period. It is best not to send multiple reports in one e-mail.