

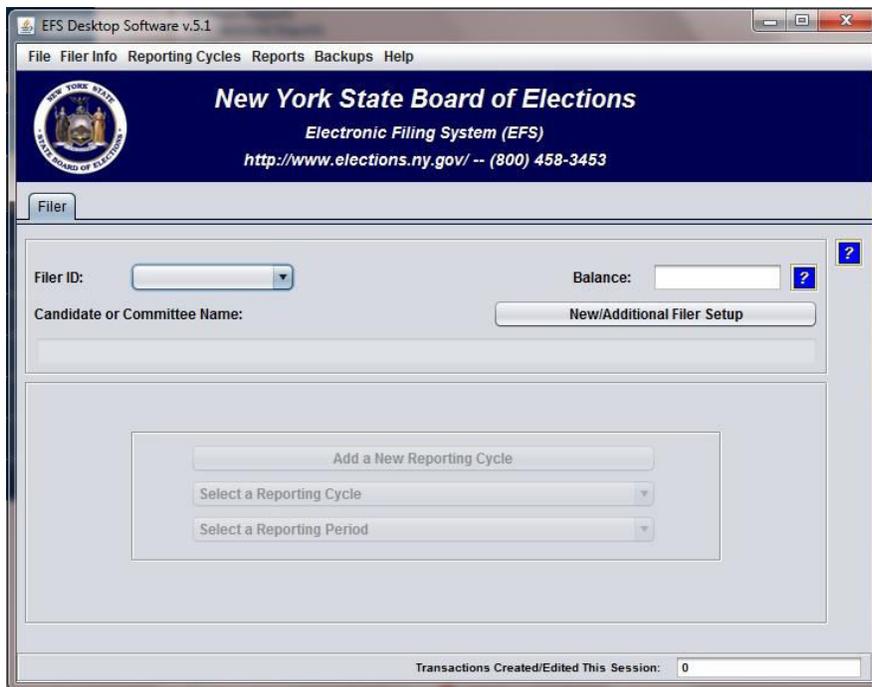
Using the Electronic Filing System (EFS) Software:

This is a brief tutorial for first-time users of the Electronic Filing System (EFS) software. A more detailed user guide can be found at <http://www.elections.ny.gov/CFFileReports.html>.

1. To open the Electronic Filing System (EFS), use the left button on your mouse to double-click on the EFS icon on your desktop.



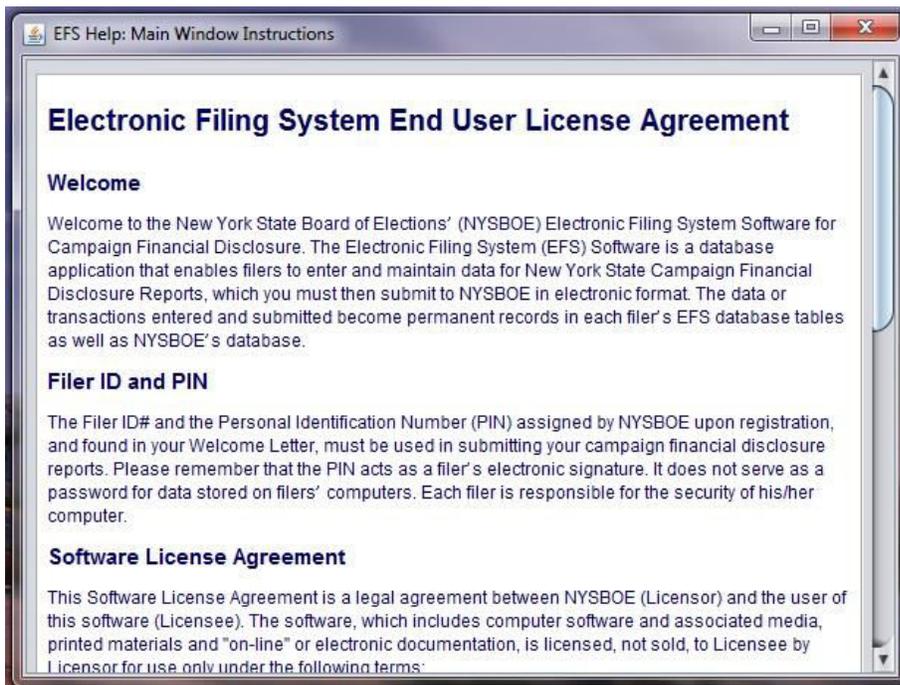
2. The Electronic Filing System (EFS) program will open.



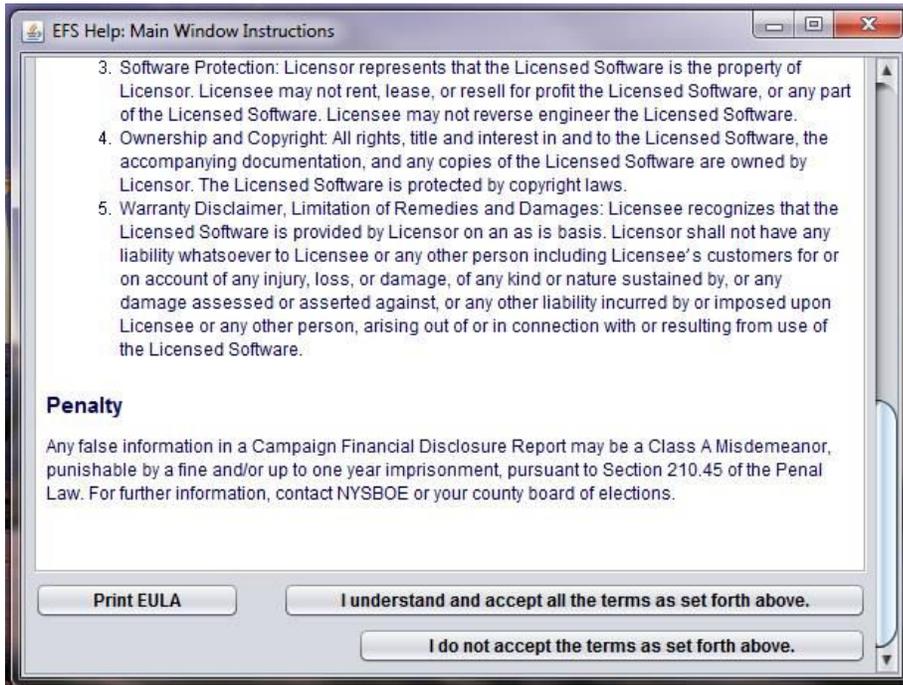
3. Initially, the Filer ID drop-down box will be empty. You will have to click on the “New/Additional Filer Setup” button, located under “Balance”, to add your filer ID, which will only have to be done one time for each different filer ID.



4. A new window will be displayed describing the EFS end user license agreement.



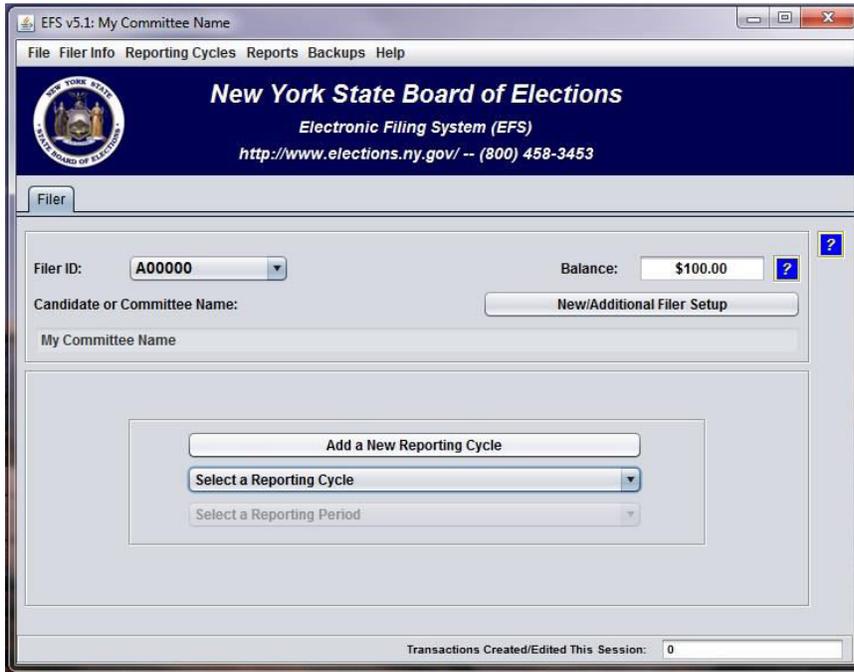
5. When you scroll down the page, click on the button, “I understand and accept all the terms as set forth above”.



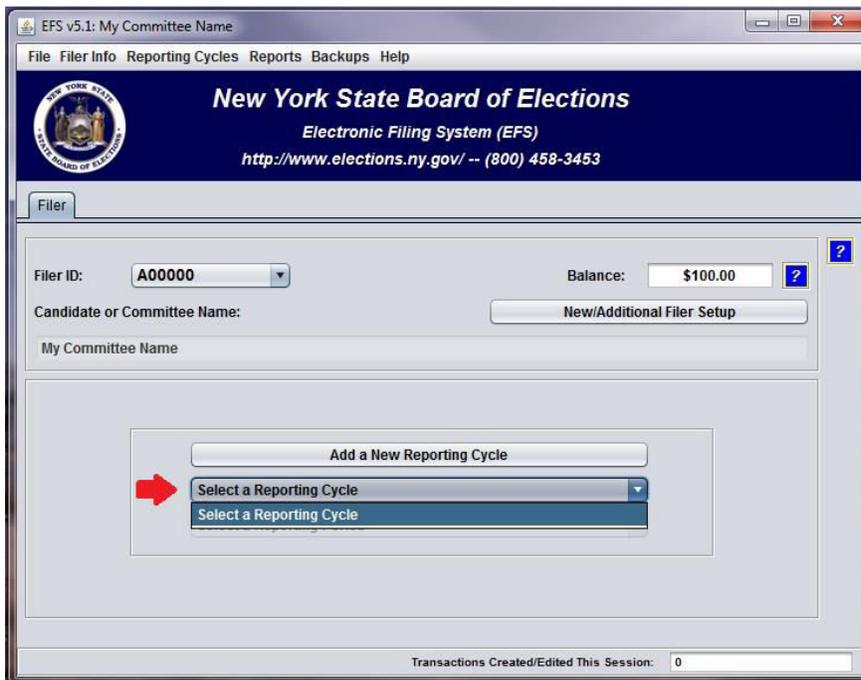
6. A new window will appear for you to enter in the requested information. The image below is shown as an example. When you have entered in the information, click on the Save button.



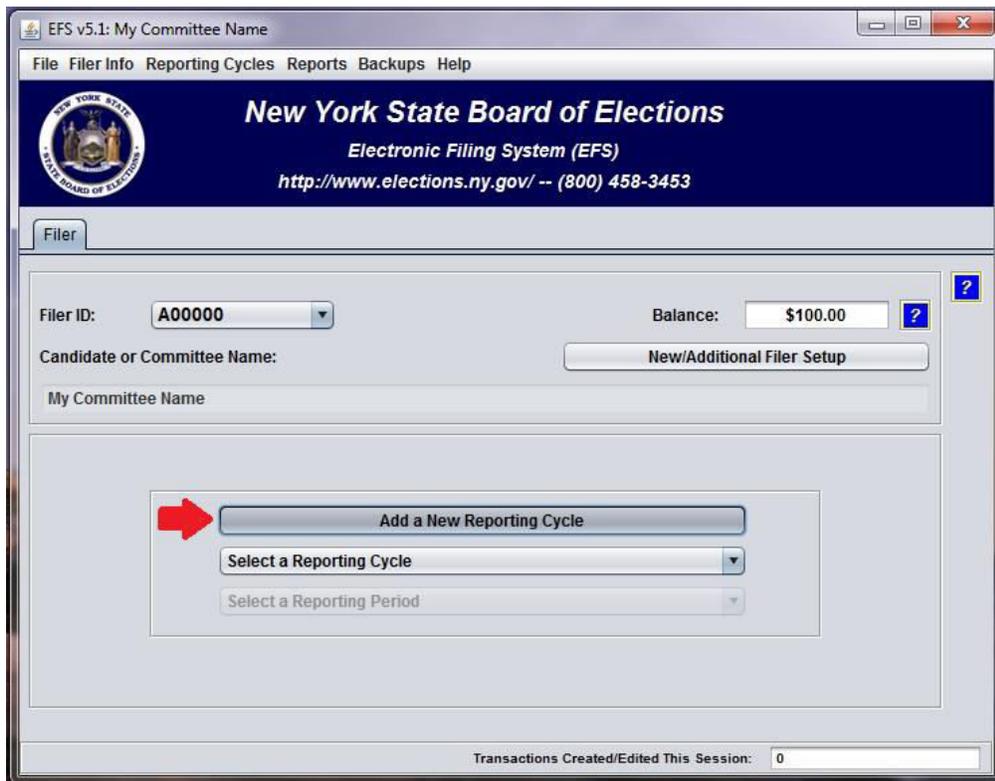
7. The filer ID and other information associated with this ID is now stored in the EFS program on your computer.



8. Now, click on the “Select a Reporting Cycle” drop-down box. The box will be empty until a new reporting cycle is added.



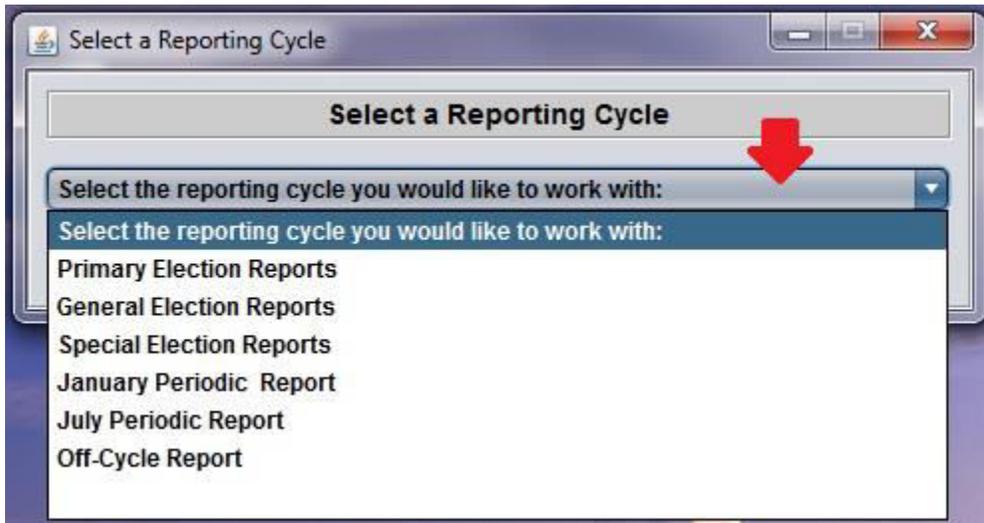
9. Click on the “Add a New Reporting Cycle” button.



10. A window will appear that prompts you to choose a reporting cycle.



11. Click on the “Select the reporting cycle you would like to work with” drop-down box.



12. For example, if you selected the July Periodic Report, then following would be displayed.



13. Next, select the year from the drop-down box, and click the “Save” button.



14. The “Transactions” tab will appear highlighted in blue.



15. Now, click on the “Choose a Schedule” drop-down box to see a listing of different schedules.



16. For example, if you selected Schedule A, then the following would be displayed. Click on the “New Transaction” button to enter a transaction.

EFS v5.1: My Committee Name

File Filer Info Reporting Cycles Reports Backups Help

New York State Board of Elections
Electronic Filing System (EFS)
http://www.elections.ny.gov/ -- (800) 458-3453

Filer Transactions

Filing Year: 2014 Filer ID: A00000 Cut-Off Date: 07/11/2014 Due Date: 07/15/2014

Schedule A: Monetary Contributions: Individual & Partnerships (0 transactions) ?

New Transaction View/Edit Transaction

2014 July Periodic: 07/15/2014; July Periodic 0 Records

Reference #	Election Year	Date Received	Contributor Type	Contributor N
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Transactions Created/Edited This Session: 0

17. The “Schedule A” screen will appear for you to enter the requested information.

EFS v5.1: My Committee Name

File Filer Info Reporting Cycles Reports Backups Help

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Filer Transactions Schedule A

SCHEDULE A - MONETARY CONTRIBUTIONS RECEIVED FROM: INDIVIDUALS & PARTNERSHIPS ?

Filing Year: 2014 Filer ID: A00000 Cut-Off Date: 07/11/2014 Due Date: 07/15/2014

* Date Received: MM/DD/YYYY * Contributor Type Code: Choose From:

* First Name: MI * Last Name:

* Amount: * * Method: * Partnership Name:

* Check #: * Street:

* City: * State: NY * Zip:

Explanation:

Search Delete Save Close

Transactions Created/Edited This Session: 0

18. Under “Date Received”, you can click on the calendar icon to select the date of the transaction.

The screenshot shows the 'New York State Board of Elections Electronic Filing System (EFS)' interface. The window title is 'EFS v5.1: My Committee Name'. The main header includes the board's logo and contact information. Below the header, there are tabs for 'Filer', 'Transactions', and 'Schedule A'. The 'Schedule A' tab is active, displaying the form 'SCHEDULE A - MONETARY CONTRIBUTIONS RECEIVED FROM: INDIVIDUALS & PARTNERSHIPS'. The form contains several input fields: 'Filing Year' (2014), 'Filer ID' (A00000), 'Cut-Off Date' (07/11/2014), and 'Due Date' (07/15/2014). The 'Date Received' field is set to 'MM/DD/YYYY' and has a calendar icon to its right, which is highlighted by a red arrow. Other fields include 'Contributor Type Code' (Choose From), 'First Name', 'MI', 'Last Name', 'Partnership Name', 'Street', 'City', 'State' (NY), and 'Zip'. There are also fields for 'Amount', 'Method', and 'Check #'. An 'Explanation' text area is at the bottom. At the bottom of the form, there are buttons for 'Search', 'Delete', 'Save', and 'Close'. A status bar at the very bottom indicates 'Transactions Created/Edited This Session: 0'.

19. After you click on the “Save” button, the transaction will be saved in the EFS application.

This screenshot is identical to the one above, showing the same 'SCHEDULE A' form in the EFS application. The only difference is that a red arrow now points to the 'Save' button at the bottom of the form, indicating the next step in the process.

20. The transaction will be listed on the “Transactions” page.

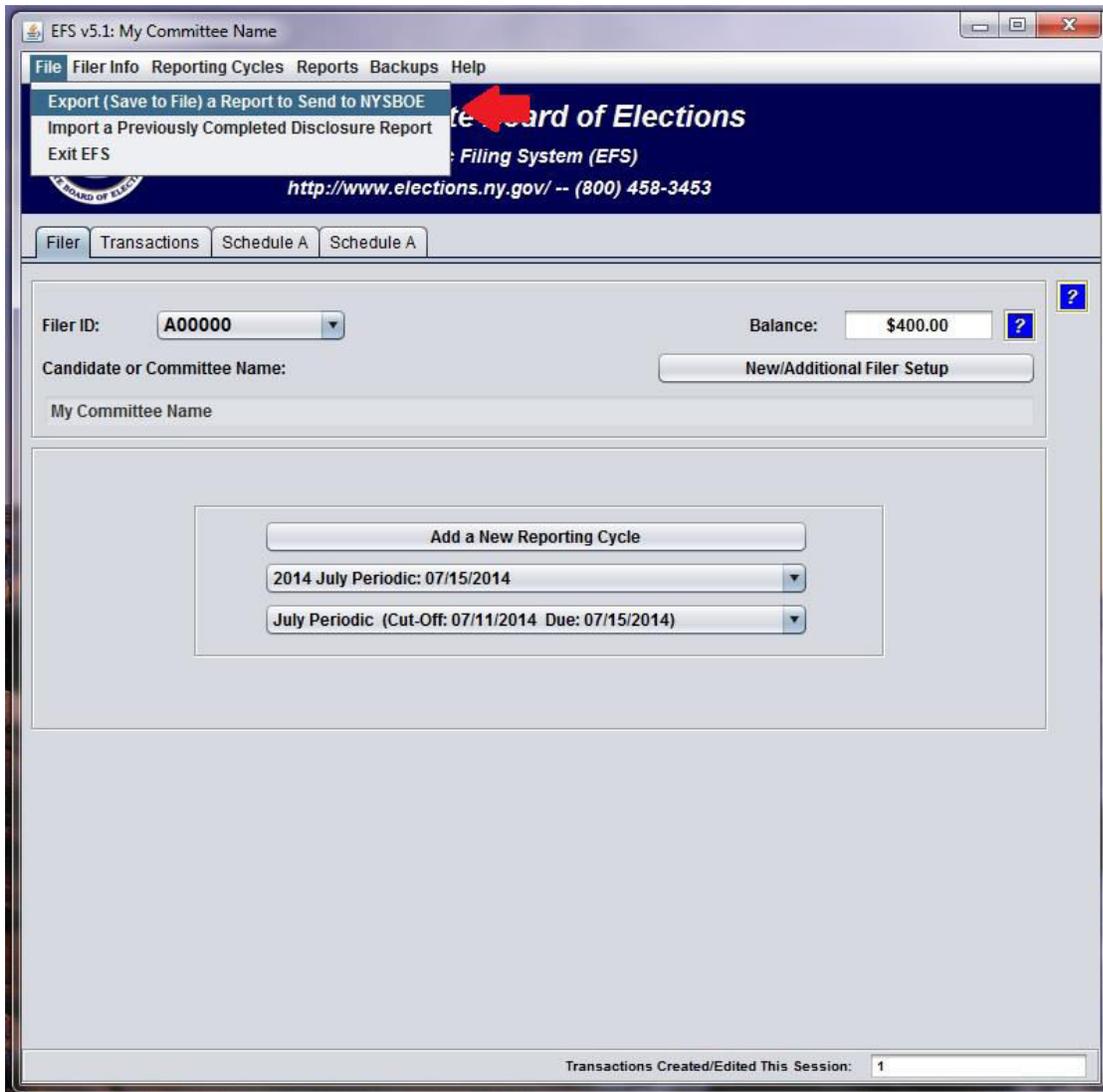


21. To edit the transaction, if necessary, make sure that it is highlighted in blue, then click on the “View/Edit Transaction” button.

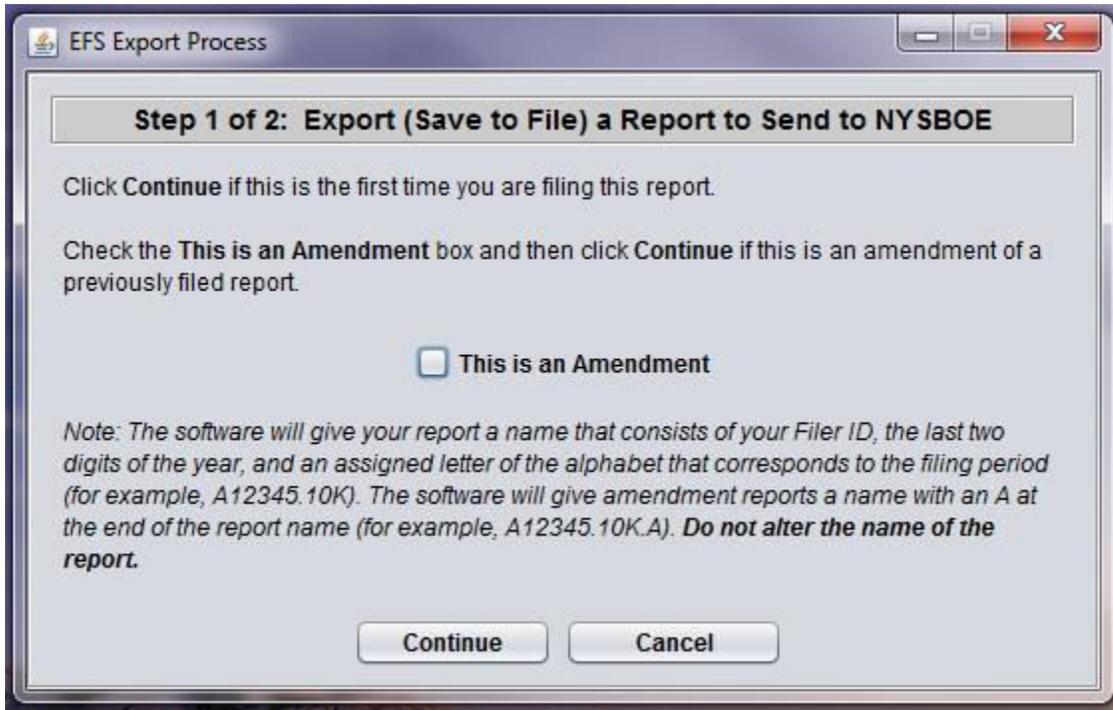


22. When you have finished entering the transactions and saved the information for the report period, you can export the report from the EFS application and email it to the New York State Board of Elections.

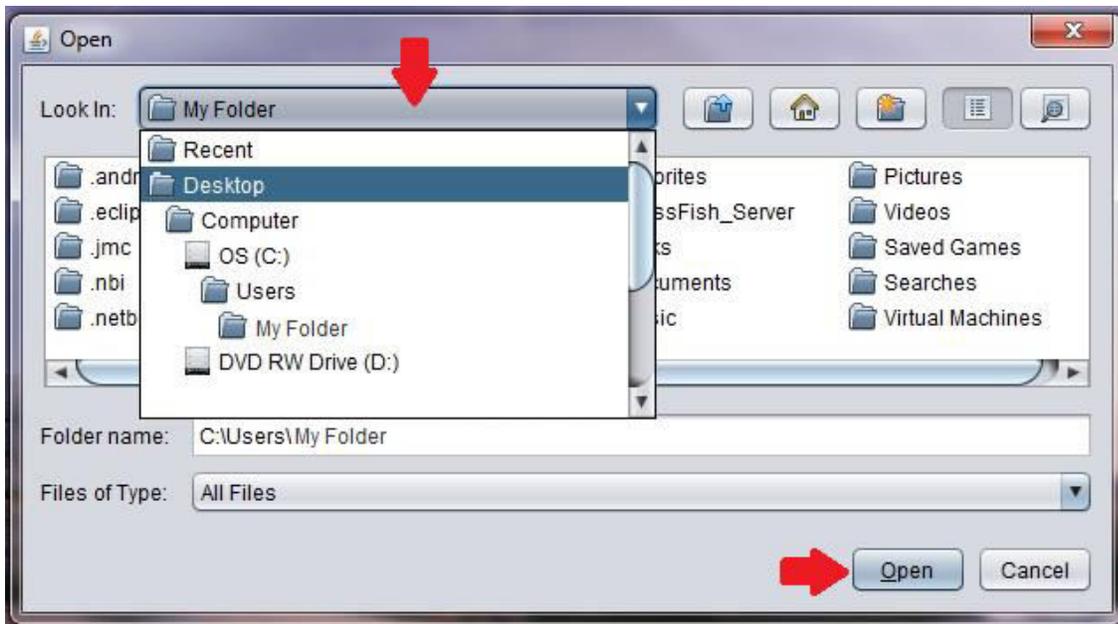
First, be sure that your Filer ID and the Reporting Period are selected in the drop-down boxes. Click on “File”, located on the left side of the menu at the top of the EFS window. Then click on “Export (Save to File) a Report to Send to NYSBOE”, which will allow you to save the file in a format that can be loaded into our system at the New York State Board of Elections.



23. The window below will appear. If the report is an amendment, then check the box labeled “This is an Amendment”. If the report is not an amendment, leave the box unchecked. Then, click on the “Continue” button to proceed.



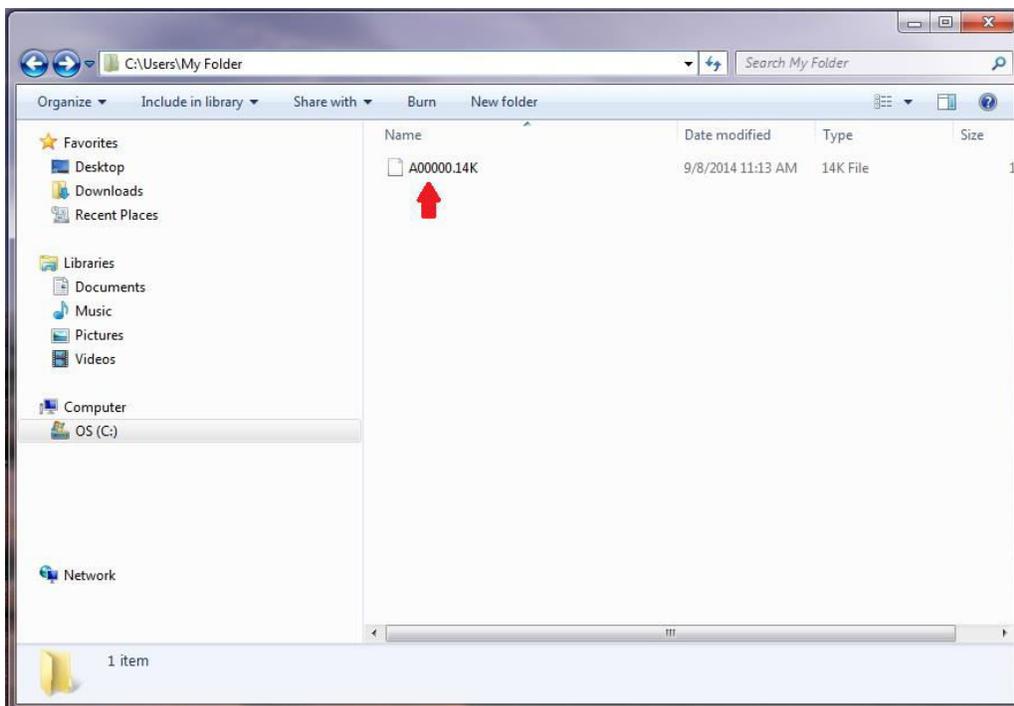
24. In this window, you can select a location on your computer to save the file. Click on the drop-down box next to “Look In:” to see the list of available locations. When you have selected the location, click on the “Open” button to save the file.



25. The window below provides information about where the report has been saved on your computer, on how to send the report to the New York State Board of Elections, and about Treasurer Resignation/Committee Termination reporting.



26. The image below shows the saved file in a location on the computer.



27. To send your saved file to the New York State Board of Elections, open your email account (examples: Google Gmail, MSN Hotmail, Yahoo, etc.) and compose a new message. Attach your saved file to the email message, type **EFS Disclosure Report** in the subject line, and send the email to: **efsfiling@elections.ny.gov**.

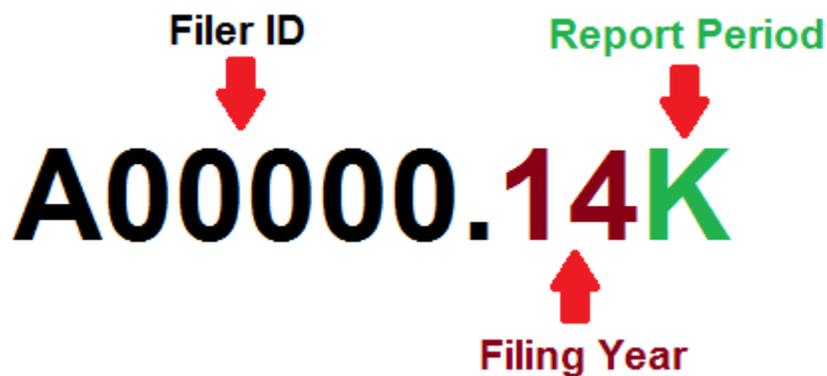
Do not edit the name given to the file by the Electronic Filing System application. Also, **do not** edit the contents of the file.

The file that you save will start with an **A** if you are a **state filer**, or a **C** if you are a **county filer**.

File name format example: **AXXXXX.14K**

Report Periods:

- A** = 32 Day Pre Primary
- B** = 11 Day Pre Primary
- C** = 10 Day Post Primary
- D** = 32 Day Pre General
- E** = 11 Day Pre General
- F** = 27 Day Post General
- G** = 32 Day Pre Special
- H** = 11 Day Pre Special
- I** = 27 Day Post Special
- J** = January Periodic
- K** = July Periodic
- L** = Off Cycle



If the file is an amendment, it will have the following format:

