



Schedules for Disclosure Reporting

Contributions

Schedules A, B, C, D, E

Expenditures

Schedule F

Transfers

Schedules G and H

Loans, Liabilities, Refunds

Schedules I, J, K, L, M

Record-Keeping

Schedules N and O

Housekeeping

Schedules P and Q

For party and constituted committees only

Allocations

Schedule R

For party, constituted and authorized multi-candidate committees only

Report Period Codes

- 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

Amended Report Coding

The software will give your file a name that consists of your Filer ID, the last two digits of the year, the letter matching the report period code and the **.A** to indicate that the filing is an amendment. (i.e. A00000.12K.A).

Verify NYSBOE's Receipt of Your Disclosure Report

To verify that your campaign financial disclosure report has been received by NYSBOE:

- Visit our website @ www.elections.ny.gov
- CLICK [Campaign Finance]
- CLICK [View Disclosure Reports]
- CLICK [Query the Database]
- CLICK [View Candidate or Committee by Name]
- Enter all or part of the Candidate or Committee name
- CLICK [Submit Query]
- CLICK on your Filer ID Link (in blue)
- CLICK on the report you want to view

Contact NYSBOE at 1-800-458-3453 if the report is missing or inaccurate.



NEW YORK STATE BOARD OF ELECTIONS (NYSBOE)

40 NORTH PEARL STREET, SUITE 5
ALBANY, NEW YORK 12207

Phone: 1-800-458-3453

Fax: 518-486-6627

Website:

www.elections.ny.gov

Electronic Filing System (EFS) Software V. 5.1

For

Campaign Financial
Disclosure Reporting



NEW YORK STATE
BOARD OF ELECTIONS

Download the EFS Software V. 5.1

Go to the New York State Board of Elections website www.elections.ny.gov

- CLICK [Campaign Finance]
- CLICK [File Disclosure Reports]
- CLICK [Download latest version 5.1 of NYS BOE Electronic Filing System (EFS) Software]
- CLICK [Icon] created on your desktop after the download

Add a New/Additional Filer Setup

- CLICK [New/Additional Filer Setup] to enter your candidate or committee information, Filer ID and PIN
- Read the [Electronic Filing System End User License Agreement] and scroll to the bottom to CLICK [I understand and accept all the terms as set forth above]
- Enter the Candidate or Committee Name
- Enter your Filer ID assigned by NYSBOE
- Enter the PIN and tab to the next field
- Enter your Filer ID and PIN again to confirm
- Enter your Initials
- Enter your Starting Balance
- CLICK Save
- CLICK on the Filer ID drop down arrow and click on the Filer ID you would like to work with
- CLICK [Add a New Reporting Cycle]
- CLICK [Select the reporting cycle you would like to work with]

Create a Report

To Create a Reporting Cycle

- CLICK [Add a New Reporting Cycle]
- [Select a Reporting Cycle] from the drop down and CLICK [Continue]
- Choosing a January or July Periodic and election year and CLICK [Save] will automatically take you to [Choose a Schedule]

OR

- Enter or select the date of the Election for Primary, General, Special or Off-Cycle and Click [Save]

Note: The software will automatically create your Primary, General & Special Election Day reporting periods with dates corresponding to the election day date selected and will return you to the main screen.

- CLICK [Select a Reporting Period] from the drop down
- CLICK [Choose a Schedule] and select a schedule from the drop down menu
- CLICK [New Transaction]
- A Schedule Tab will be created on your Navigation Bar every time you choose a Schedule and CLICK [New Transaction]

Enter Transactions

- Enter the transaction information required for the selected schedule and CLICK [Save]
- Add any additional transactions and CLICK [Close] when finished with that schedule
- Click [Transactions] on the navigation bar to create a new schedule, repeating [Choose a Schedule] and [New Transaction]

Submit a Report to NYSBOE

Submitting a report requires two steps. **First**, you will need to Export(save to file) the report and **Second**, you will need to attach the report to an email and send it to efsfiling@elections.ny.gov

- Select the Reporting Cycle from the drop down for [Select a Reporting Cycle]. For Primary, General and Special Election reports also select the Reporting Period from the drop down for [Select a Reporting Period] you want to submit
- CLICK [File] in the Menu Bar and choose [Export (Save to File) a Report to send to NYSBOE]

Step 1 - Export a Report

- If this is an Amendment to a previously filed report, check the box [This is an Amendment]
- CLICK [Continue] if this is the first time you are filing this report

The software will give your file a name, that consists of your Filer ID, the last two digits of the year and the letter ending to match the report period code (i.e.A00000.12K)

- Select the directory you want to save your file to and CLICK [OPEN]

Step 2 - Send Exported Report by email

The report has been exported to the following location on your computer:

C:\Program Files\NYS Board of Elections\EFS\FILINGS\C-exmpl.11D

- Open your email account to compose new mail
- Type efsfiling@elections.ny.gov in the TO: field
- Type **EFS Disclosure Report** in the Subject field
- Attach the exported disclosure report to the email and CLICK **Send**

