Downloading & Installing the **E**lectronic **F**iling **S**oftware

Go to our website at: www.elections.state.ny.us
Click on the "Campaign Finance" tab, then click on "Downloads."
Under "Electronic Filing Software and User Guide" Click on:
"Download latest Version 4.0 of NYSBOE Electronic Filing System Software"

Box will ask if you want to run or save

- if dial-up connection to internet, choose save (to desktop or elsewhere). After saving (can take up to 1 hour) double-click on the "setup.exe" file to launch installation. If saving of setup file fails, please call the help desk to request an installation disk be mailed.
- if high-speed connection to internet, choose run

During install, accept all default settings, clicking [next] when prompted.

Upon successful installation, the EFS User Guide will open in a .pdf document; please print for your usage.

To Begin Using the Electronic Filing Program

1. Double click the Electronic Filing Program icon on your desktop (looks like a Romanesque building with a lit torch.)
2. Click the [BEGIN SESSION] button.
3. Enter your initials and click OK or enter. You will now be in the main screen (NYS Board of Elections Disclosure Filing Software Version 4.0).

Creating your master record (completing the grey filer information section.)

1. Click in the very beginning of the ID Number field and enter your six character Filer ID Number that was assigned to you by the New York State Board of Elections (e.g. A12345 or C12345).
2. Tab over to the Committee or Candidate Name field and type in whichever is applicable.
3. For State office, fill in Office, District and Type fields. For County office, leave Office, District and Type fields blank by tabbing through to Treasurer information.
4. After entering the Treasurer and Depository information, click the Post-Edit button (✓). A pop up box will appear to enter your PIN (Personal Identification Number).
5. Enter the 8-digit PIN that was assigned with your Filer ID Number then click OK. Now your master record has been saved and you are ready to add the period and schedules.

Creating a Filing Period and Schedules

1. On the menu bar located at the very top of the screen, click [Inventory Maintenance].
2. Click [Add Periods/Schedules]. A reddish-brown Inventory Maintenance box will appear on mid-left part of screen.
3. Click on the downward arrow to select "Year Filing Due" and select appropriate year on the drop down box. A note will appear explaining how to properly choose the filing year. If need be, go back and choose the correct filing year. Read the note, click OK.
4. Tab to the "Filing Period" field, click the downward arrow and choose appropriate filing period and click.
5. Tab to the "Schedule" field, click the downward arrow and select the applicable schedule for your transactions. To save each schedule you created, you need to click on the Post-Edit button (✓) after adding each schedule. The schedules you created will appear in the upper right side of the screen under Filing Inventory (white and blue box).
6. Once you have entered all your schedules, click the [Exit] button inside the Inventory Maintenance Screen so that you can start entering data in your schedules.

Entering Schedule Data

1. In the Filing Inventory Section, **double click** on the year, period and schedule you want to enter transactions for.
2. You should now see an asterisk next to the Date field in the transaction (green) section which indicates that you can start entering transactions (if not, repeat step 1). Enter the date manually (MM/DD/YYYY) or double click on the Date field to show the Date Selection Calendar. Double click on the date you need and the date will be placed in the date field. Tab to the next field. (HELPFUL HINT: It is easier to manually type in the date)
3. Fill in each field with the required information by tabbing. All fields are required to be filled in.

NOTE: If you have a transaction to enter with a name you previously used, you can double click on the Name field and a box will appear. Enter the name you are searching for between the percentage signs. Click OK. Double click on the name you want to enter and it should appear in the Name field. Fill in remaining fields.

HELPFUL HINT: Should you accidently double click on the Name field, but did not intend on searching for a previously used name, click on cancel in the Input Box.

4. When you are finished entering the last field of the transaction, you can either tab to the next line if you have more transactions to enter, which will automatically save the previous transaction, or click on the Post-Edit button (✓) to save the transaction.

Filing your Disclosure Statement

1. Select any schedule for that particular Filing Year and Period you want from the Filing Inventory that appears on your screen.
2. On the menu bar, click [File].
3. Then click [File Disclosure Statement].
4. Read the Legal Notice and click OK.
5. Select filing type: standard for original filing, amendment for amended filing. Click OK.
6. Select Filing Period; click OK.
7. Verify that the default filing year is correct; click OK.
8. Verify that the Filer ID is correct; click OK.
9. Now you'll be prompted to insert a floppy disk. If you do not have one or prefer to save to your hard drive, click ok anyway. Another box will appear to ask you to insert the floppy disk. Click cancel and save disclosure statement to an area that is easily retrievable (e.g. C drive) . DO NOT alter the file name that the program gives to your filing; click save. In the transaction section you will see a box showing how many records were exported and to where they were saved. The number exported should always be greater than zero.

To SubmitYour Filing to the NYS Board of Elections

Email Filings:

The file that was created during the saving process now needs to be attached to an email and sent to us.

- If your email program is set as the default email, such as Outlook or Outlook Express, you can click on [File] from the menu bar then select [Send Statement by Email]. This will open a blank message with our address in the "To" field, attach file and hit send.
- If your email is not set up as the default, then log into your email as you normally would then bring up a blank message. In the "To" field enter our address, efsfiling@elections.state.ny.us and in the "subject" field enter "efs filing" then attach your file and send.

Diskette:
After we have received and successfully uploaded your filing, your reports will be viewable on our web site.

- Save your filing onto a floppy diskette.
- Place it in a secure diskette mailer and mail to:
  NYS Board of Elections
  Campaign Finance Unit
  40 Steuben Street
  Albany, NY 12207
- Be sure to label your diskette with Filer ID Number, Committee Name and the year and type of report.
- You should always go to our website to confirm that your report was received and the information and balance that appears correctly reflects the information in your records.

To Check Your Reports On Our Web Site

- Go to www.elections.state.ny.us
- Click on the "disclosure reports" link under Campaign Finance.
- On the right of the screen, under Query the Database, click on "view committee by name"
- Input one unique word of the name of your committee.
- Click submit query.
- Click on your Filer ID Number. You will then see what reports we have received from you. Click on the one(s) you would like to view.

To Add Additional Committee

1. Highlight original existing Filer ID number with mouse.
2. Click the New Record button (+). The Filer section will now go blank.
3. Follow steps for "Creating your Master record" to add additional committee record.

NOTE: For filers with multiple committees, Filer ID's are stored in the program by alpha numeric. When you log into the software the next time, it will default to the lowest alpha numeric number. Double click in the Filer ID field and a drop down list will appear. Choose the Filer ID number you want to access and enter the pin number for that Filer ID.