Campaign Finance eFiler Service

for the use of Livingston County Registered Committees

The Elections office of the Livingston County Clerk has adopted this eFiler Service to allow Candidate committees to electronically file required Campaign Finance reports with your county's Elections Office.

Access to this system is via secure login only for authorized users of this Committee. If your committee has not received an email at your committee's official address with a link to your eFile account, please contact the Livingston County Elections office at (517) 546-8177 or JBridgman@livgov.com.

Overview

The Livingston County eFiler Service is designed to allow you to enter your filing data into online forms resembling the paper and PDF forms you may have already used. Please refer the original Michigan Secretary of State form for instructions regarding how to prepare your report in general or any individual schedule in particular.

In addition to recording your data into the state required form, eFiler assists you by searching ahead, as you type, to offer matching contributors already in the system. It offers you suggested addresses as you type in information about new users. Best of all, it even helps to "do the math" when it comes to tracking and calculating various cumulative totals throughout the report.

First Time Users – even long-time treasurers

If you are logging in for the first time, it is unlikely that there is any data in the system for your committee. Even if your committee has been filing for years, it is unlikely your committee's previous filing data will be available as you file for the current reporting period. This first filing will become the committee's "previous reporting period" data for the next reporting period.

You will need your previously filed report in order to have carry-over values available to add to these values to your initial filing.

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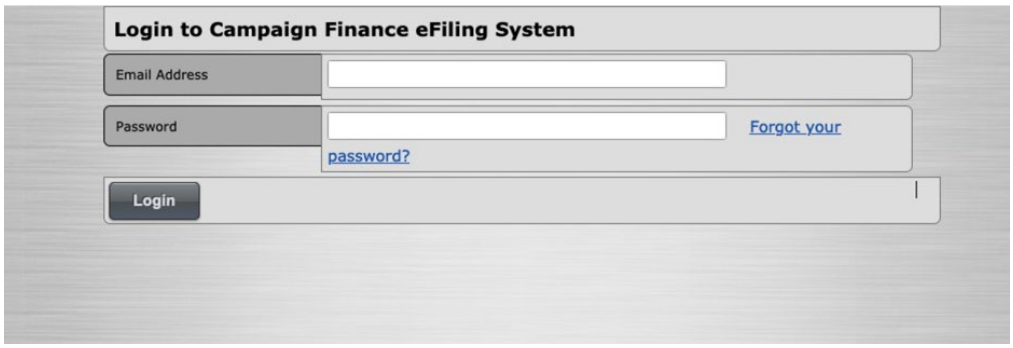
Getting Started

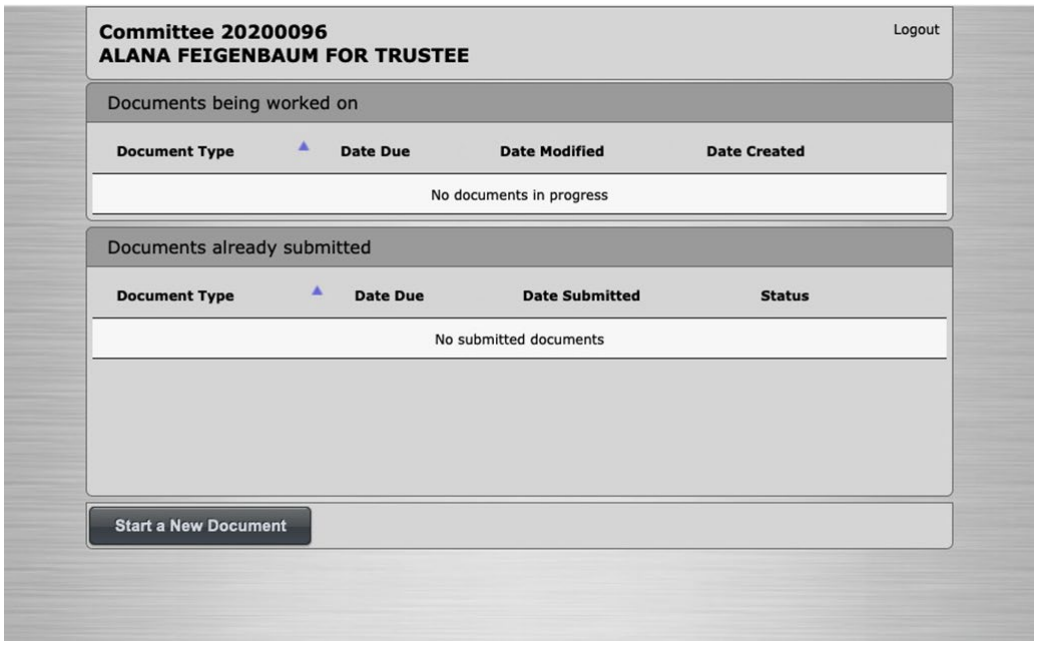
Please visit https://campaignfinance.us/mi-livingston/efile to login.
Note: URLs are not case sensitive, we use mixed case for readability.

Enter your email, which is not case sensitive and your password, which IS case sensitive.

Home Screen



Following your successful login your will arrive at the eFile home page, which initially will not contain any documents and will look like this:



The home screen is divided into 2 sections. The **Top Section** is for "**Documents being worked on**" and the **Bottom Section** is where "**Documents already submitted**" to the Clerk appear. As you create new documents, edit, complete and eventually submit your completed report to the clerk, these sections will list those documents both in progress or previously submitted.

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Creating A New Filing

When you are ready to begin your filing, press the "Start a New Document" button at the bottom of the home page. You will see a Pop-up window offering a choice of different filing documents you can create with the eFiler system.

Select the appropriate choice for the report you are creating and press "Start Document". A new document will be created, and your browser will load that document, which consists of a cover page and summary page.

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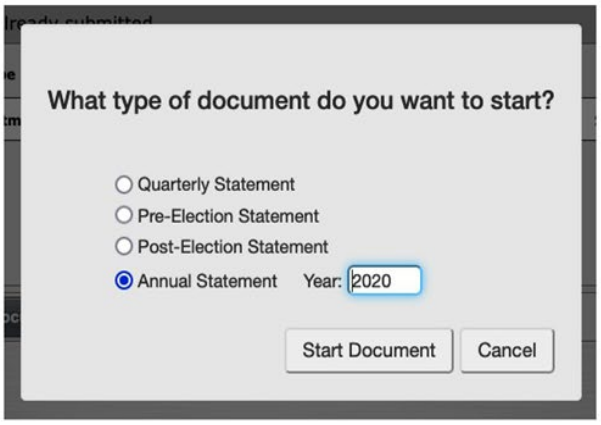
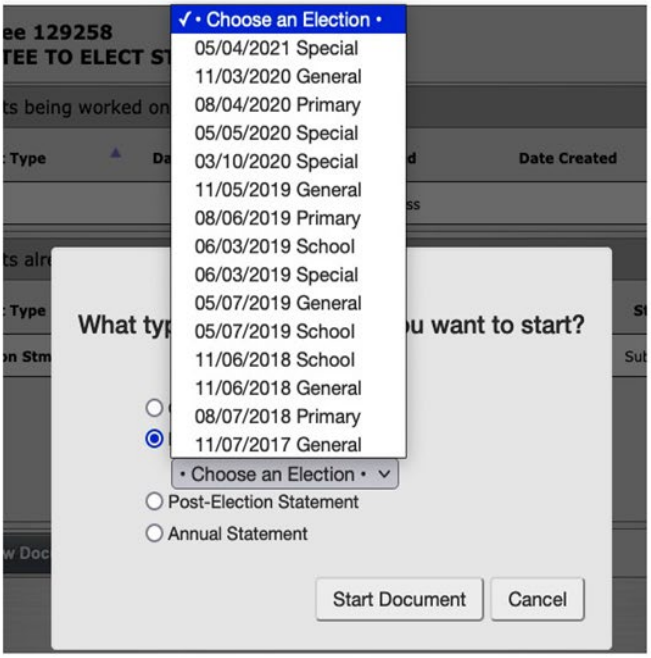


1. Select the Type of Statement you are creating
2. Identify the Reporting Period for which the Document is being Created.

Pre and Post Election Statements provide a list of recent elections to select from.



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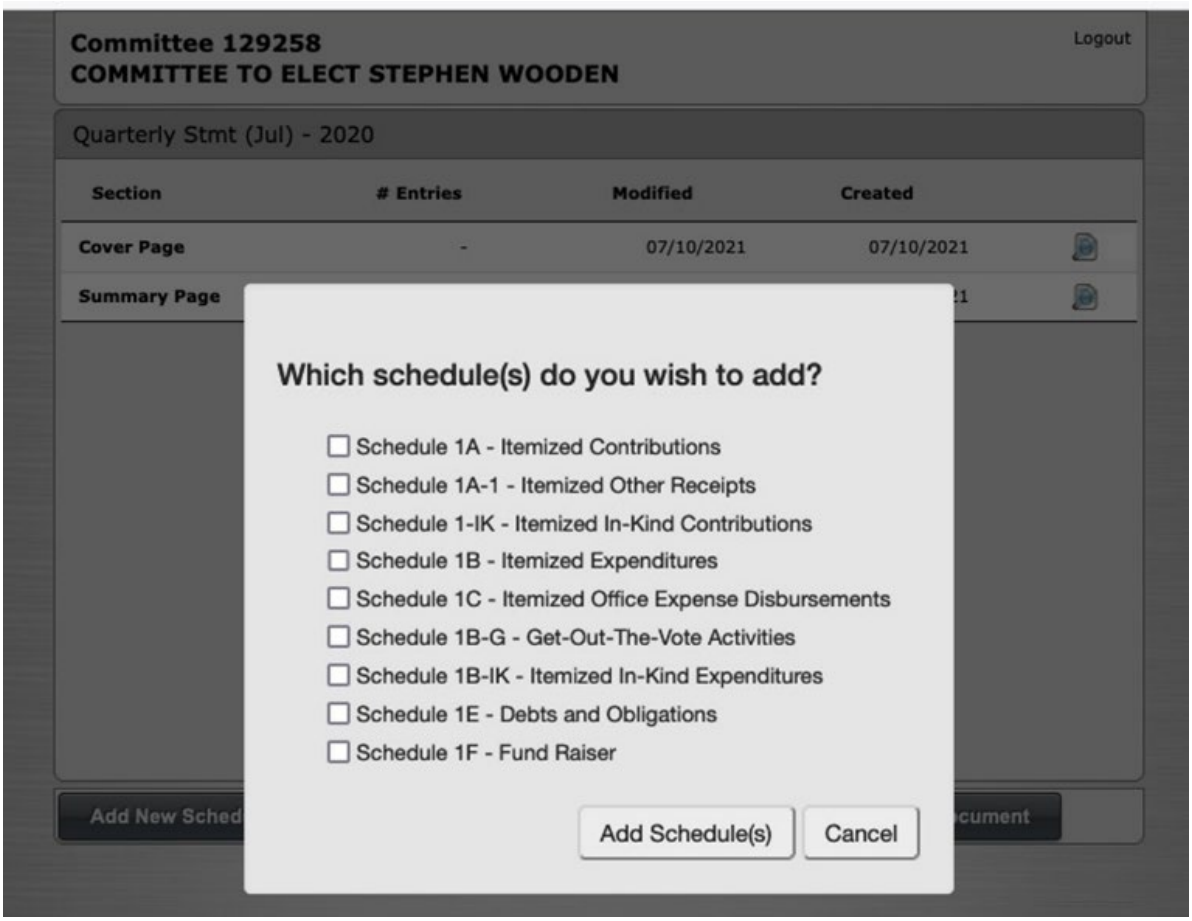
The next step is to add the schedules needed to complete your committee's report using the "Add New Schedule" button at the bottom left of the page.

Pressing the "Add New Schedule" button will open a window allowing you check off 1 or more schedules you wish to add to your filing document. Press "Add Schedule(s)" and these documents will be added to the list that begins with just a Cover Page and a Summary Page.



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Preparing Your Document

A successful login to eFiler will take the user to the home page where any documents in progress appear at the top of the screen. These "working" documents are available to edit or submit.

Filings previously submitted to Elections' Office are listed in the lower portion of thescreen and are not editable.

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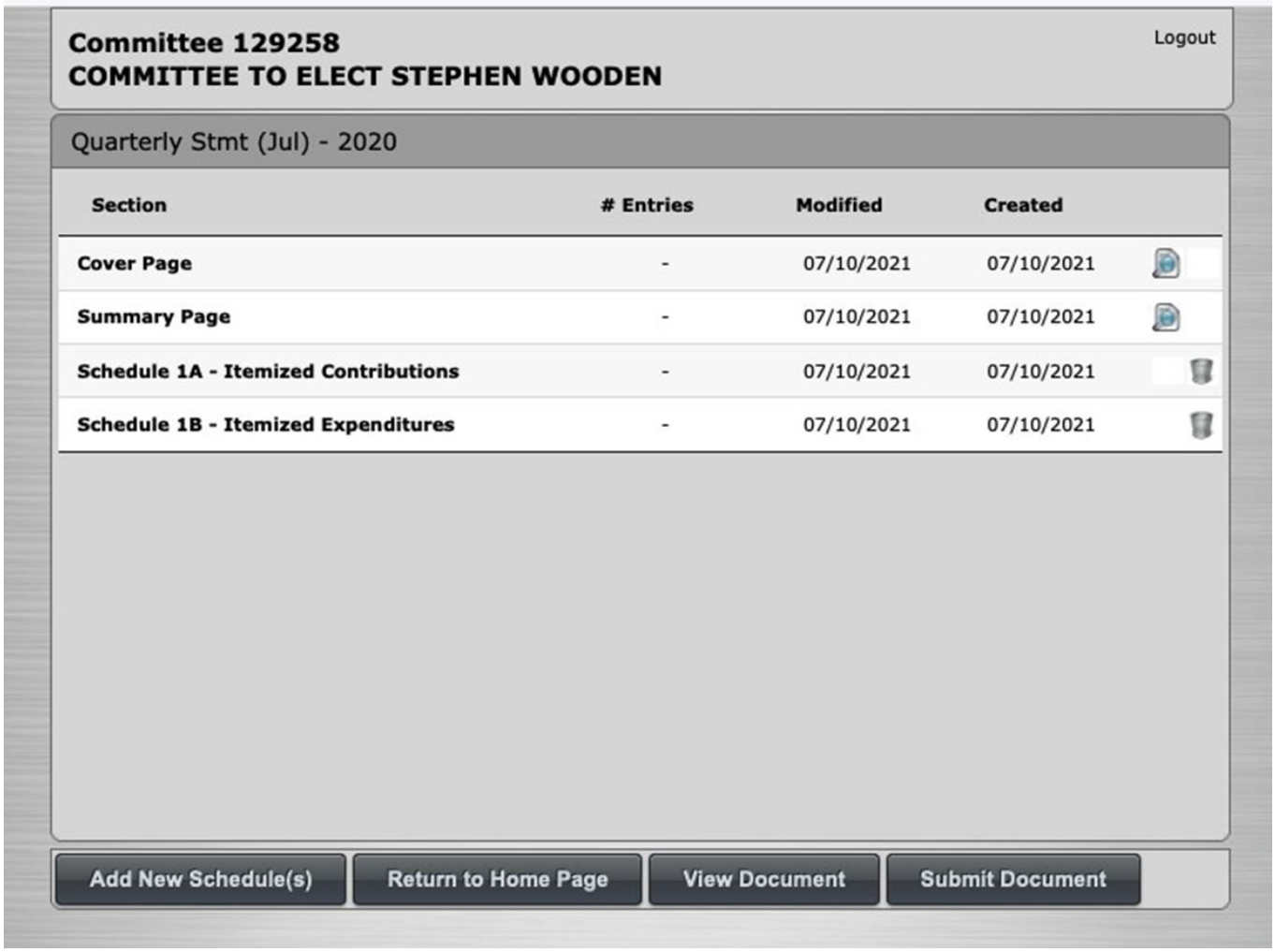
Click on a Document Name to Access all Pages/Schedules

To open a document for editing, click on the Document name's text. For example, in the screenshot, clicking on "Quarterly Stmt(Jul)-2020" will open a page showing all the pages in the document. A new document will initially have only a Cover and a Summary page. New pages, specifically: Schedules mandated by the Secretary of State, can be added by clicking on the "Add New Schedule" button. Any page or schedule in the reporting document can be edited by clicking on the Page/Schedule you wish to work with.



For details on completing any individual schedule or mandated filing, please reference the documents at your County Clerk's website or via the Secretary of State: https://www.michigan.gov/sos/0,4670,7-127-1633_8723_11893_66102---,00.html

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Entering Data Quickly and Correctly

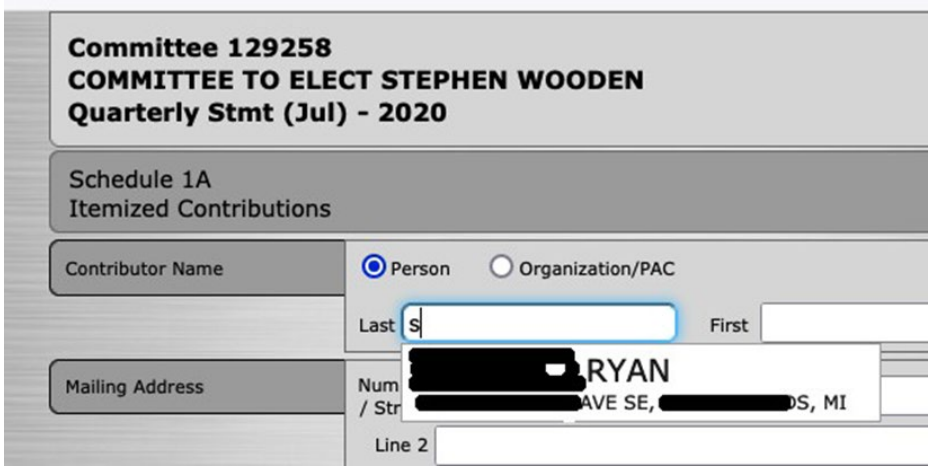
The eFiler service strives to provide the ease of filling out a paper form with the error prevention and time saving capabilities of computer technology. The most visible example of this is seen while entering contribution and expenditure data.

eFiler uses the data that you type to find the names of previous contributors or payees who have appeared in previous filings. Any matching contributors are presented for selection, eliminating the need to continue typing in known data. Even when the data isn't known, the service checks the address being typed against public databases to help offer the User a list of easy to select choices of actual addresses, speeding data entry and eliminating typical miskeyed information.

Contributors and Payees

The eFiler service remembers your previous entries so when entering a previous contributor or a repeat purchase, a dropdown list of the most likely matching choices appears. Select the existing Contributor and their correct address and all corresponding information is loaded into the form.

Otherwise continue typing as you normally would to complete that entry. As you type an address you can select among possible choices, continue typing until only 1 choice is left to select or type a new value that isn't currently in the system. Entry of expenditures feature these same time savers.



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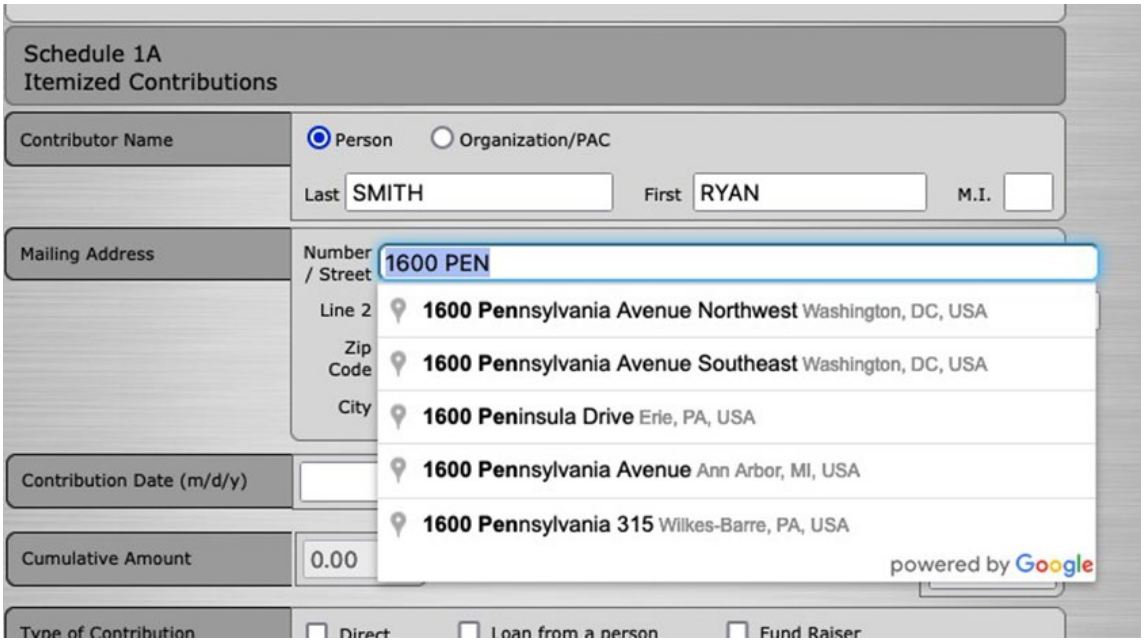
When entering a new Contributor or Payee, eFiler still helps by offering suggested addresses based on your typing, helping to ensure the proper address appears in the public record.



Whatever the data being entered, contribution or payment, each transaction is recorded separately. Each item is entered on a form and saved when the User presses saves and an emptied form remains, ready for the next entry. This tool was designed with the idea that it can be used, live, at a fundraiser to record contributions as they're given.

Since eFiler is replicating a paper filing, the service is smart enough to

- Carry over data from previous eFilings including
  - Loans, Bank Balances, Payables,
  - Contributor and Vendor information
- Track Individual and PAC contributions throughout the cycle
  - Warns when exceeds limits
- Organize items into proper formats
  - 4 contributions per page
  - 5 expenditures per page
- Subtotal each Page
- Total all Contributions or Expenditures
- Feed all Schedule Totals into the Summary Page

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Summary Page

When opening the Summary Page you will be shown the current totals of all Schedules currently stored in this document and all previous "carried over" data from your committee's previous eFilings.

If this is your committee's first filing or first filing using the eFiler Service, your committee's previous totals will be $0. If you previously filed a report on paper, you should enter theses values from your previous paper filings in the appropriate entry box on the Summary Page.

Previewing Your Report

The eFiler service stores all your submitted data in our servers' Clerk's database. The eFiler can also create the paper report, via PDF as defined by law and the format that Michigan's County Clerks work with and present to the public.

If you wish to preview your any "Yet to Filed" documents, just press the preview button and a report will be created and a link to that PDF will be emailed to your login address when the report is complete.

Please Note: The more pages in the document, the longer the delay in receiving the email. Please notify your Clerk if you haven't received an email with a link to the requested document within 15 minutes.

Completing Your Document, Validating and Submitting to the Clerk

Once all schedules have been completed and reviewed by you, after the Cover and Summary pages are completed with carry over data added. It is time to validate your document, fix any of the errors found and then submit it to the County Clerk's Election office. This validation will also occur when you press submit, so you may submit the document without manually invoking the preview as described below.

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In order to validate your filing document, return to the home page. In the list of "Documents being worked on", note the 3 small icons to the right of each document.

Farthest to the left is to Preview the Document. Press and a PDF file your report will be created and an email with a link will be sent to your login address when the report is ready to view.

The arrow, will initiate a validation test of your document and report any errors found. This is the best way to ensure that your filing is correct and will be accepted by the clerk.

The trash can, will delete your report, if you decide it's no longer needed.

Submitting your document will have the effect of locking the document from editing.

Your document will no longer appear in the "being worked on" portion of the screen, but only on the bottom under "Documents already submitted".

Enter Document Home

Users of eFiler can submit any Document by clicking on the document name and entering the Document Home and click on the Submit Statemen button at the bottom right of the screen.

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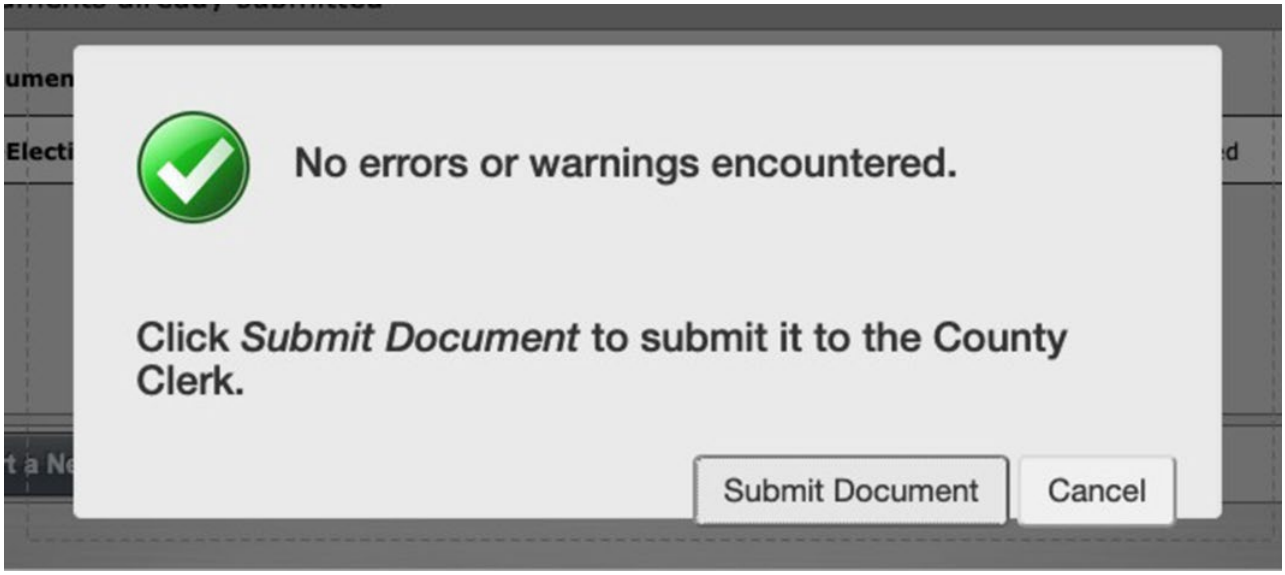
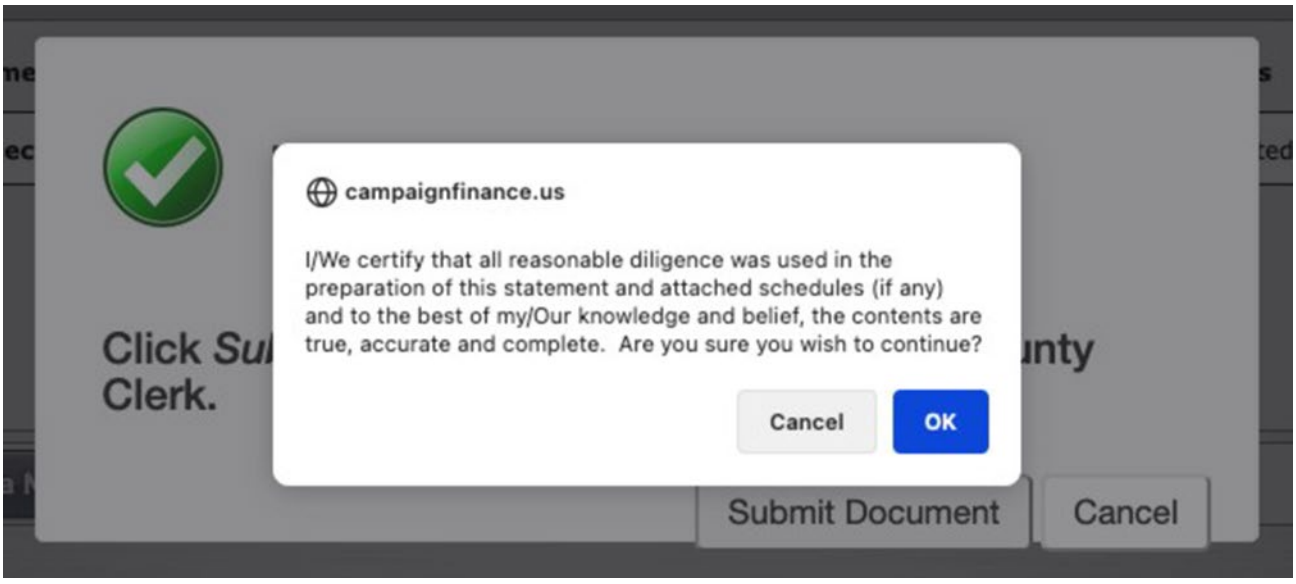
When you click the Submit Document button eFiler will validate your document. Ifcorrect this window will popup:



Click "Submit Document" and **WAIT** for this last popup.



If you accept, click to confirm this is your committee's official submission. Your report is now submitted, with a timestamp of when you pressed submit.

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