CFIS: Campaign Finance Information System

User's Guide

FEBRUARY 2018

CampaignFinance@wi.gov
https://cfis.wi.gov

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Registering a Committee

> Only committees required to file with the Ethics Commission should register using CFIS. If you are a candidate for local office, you should register with the municipal, county, or school board clerk that serves as the filing officer for that position.

1. Go to https://cfis.wi.gov. Click **Register a Committee** on the left-hand menu.

2. In the **Committee Type** field, choose the type of committee you are registering. If prompted, also complete the **Sub Committee** and **Party Affiliation** fields.

3. Click **Continue**.

4. Read through the Committee Registration Information and click **Continue** at the bottom of the screen.

5. Enter your committee's information in the required fields and click **Continue** at the bottom of the screen. Required fields are marked with a red asterisk (*).

6. Review and confirm the accuracy of the information you have entered. If there are any errors in your registration, click the **Step 2** button to return to the previous screen. If your registration information is correct, click **Register**.

7. To complete your registration, you must print and sign your completed CF-1 form. Click **View/Print** to access the PDF of your committee registration.

8. Have all parties named under the Certificate section sign the registration. Return your completed CF-1 registration form to the Ethics Commission using one of the methods below:

E-mail
CampaignFinance@wi.gov

Fax
(608) 264-9319

Mail
Wisconsin Ethics Commission
PO Box 7125
Madison, WI 53707-7125

Hand Delivery
101 E Wilson St.
Suite 127
Madison, WI 53703

9. Once your signed CF-1 registration form has been received by the Ethics Commission, you will receive an email with your Committee ID that you will use to login to the system and your system-generated password. We recommend that you immediately change the password to something you will remember. Instructions for changing your password are available on page **29**.

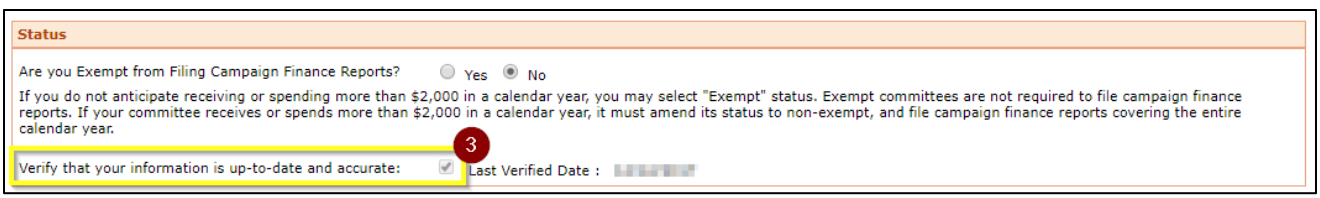
Amending a Registration

Statute requires committees and conduits to update their registration statement within 10 days of any changes in information.

1. Login to CFIS and click **View/Edit Registration Information** under **Administrative** in the left-hand menu.

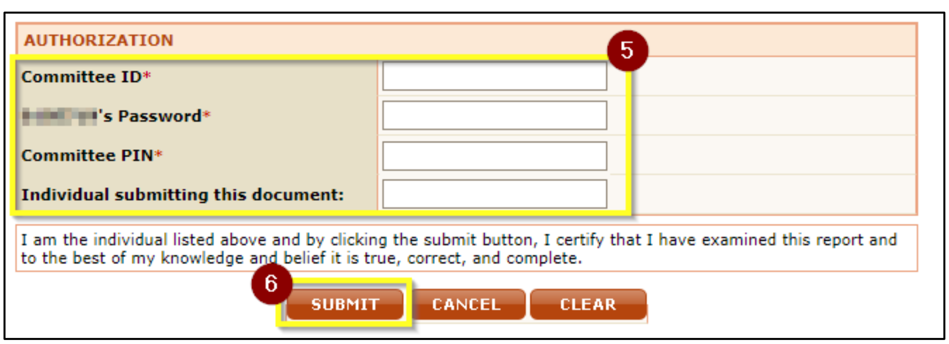
2. Make any necessary changes to your registration.

3. If you haven't updated your registration in the last 12 months, you will be asked to verify your information. To mark that you've verified the information on your registration, check the box in the **Status** section verifying that your information is up-to-date and accurate.



4. Click **Submit**.

5. To electronically sign your registration, enter your **Committee ID** number, **Password**, **PIN**, and enter your **name**. If you've forgotten your PIN, see the **What is my committee's PIN?** section on page **29**.



6. You're done! As you've electronically signed your registration, you do not need to return a signed copy to the Ethics Commission.

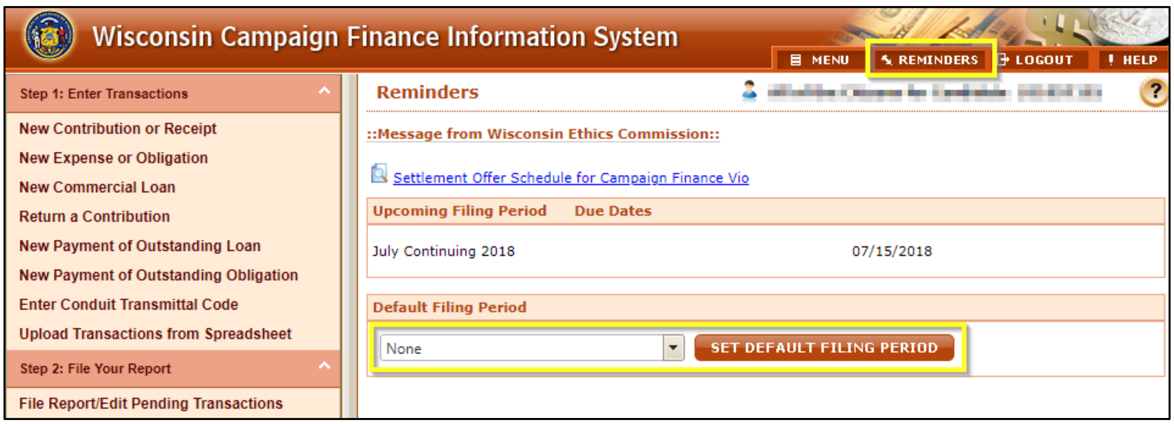
Entering Transactions

To proceed, ensure you're logged into CFIS. If you've forgotten your password or username, please review the Frequently Asked Questions section beginning on page 28.

Filing Periods in CFIS

CFIS groups transactions into filing periods. The system will record transactions to the current filing period by default. You can manually change the filing period when you are entering a transaction, or you can change the default filing period for your login session if you will be entering many transactions for a specific filing period.

- To change the default filing period for your login session, go to the **Reminders** screen and choose from the **Default Filing Period** drop-down menu. This is the first screen you see after logging in. If you need to return to this screen, you can click the **Reminders** button on the top right of the screen.



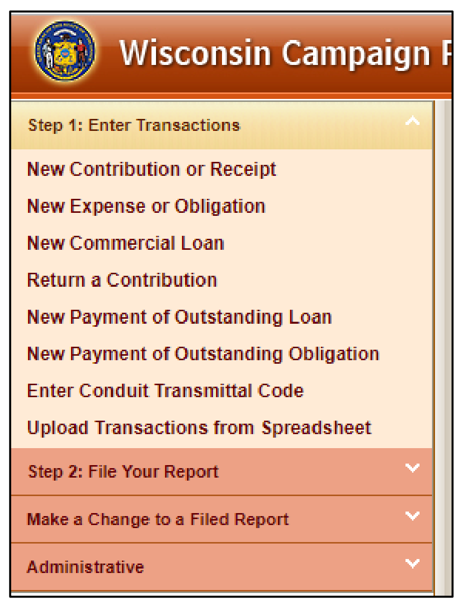
Recording Transactions in CFIS

- Once logged in to CFIS, choose the type of transaction you need to record from the **Step 1: Enter Transactions** section of the left-hand menu.

- Complete all required information to log the transaction. Required fields are marked with a red asterisk (*).

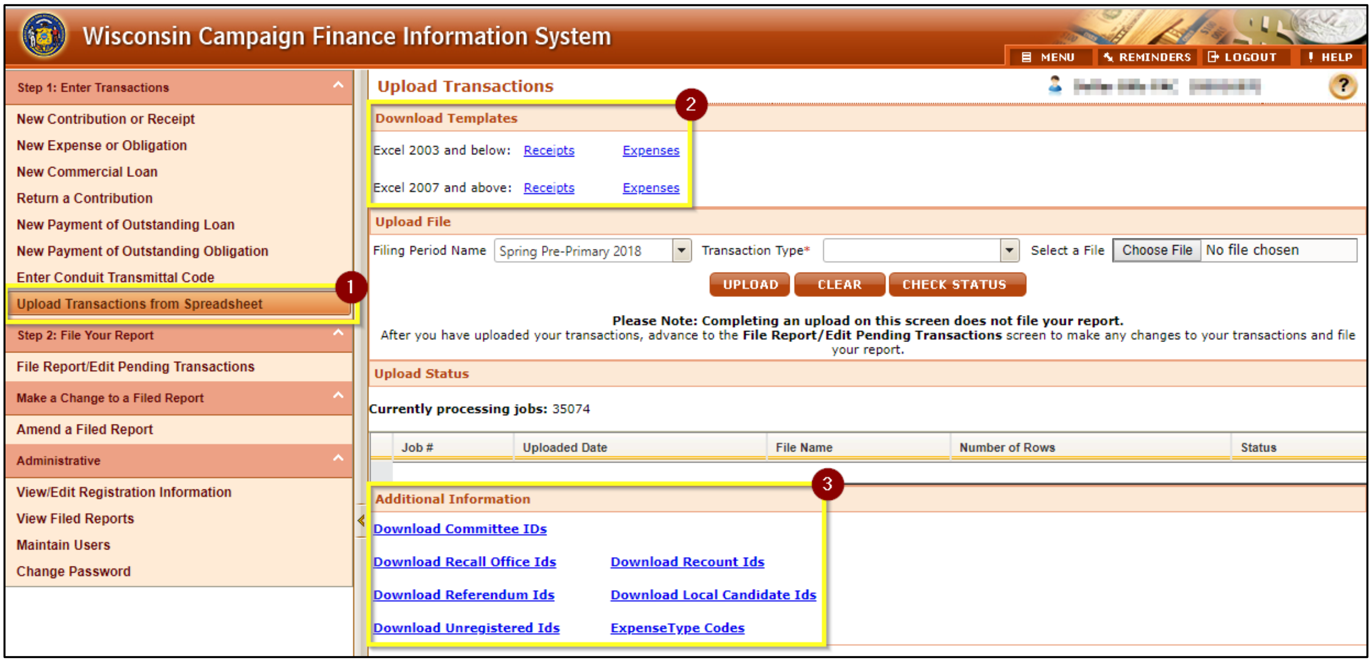
- If you have many receipts and expenses, uploading your transactions using a spreadsheet may save you time. Information on the upload process is covered in the next section.

  - Note: new commercial loans, loan payments, returned receipts, and payments of incurred obligations must be logged manually in CFIS. These transactions are not supported by the spreadsheet upload process.



Uploading Transactions from a Spreadsheet

To upload transactions directly into CFIS using a spreadsheet, you will need to download a copy of the upload template and the codes you will use to categorize transactions.



1. Login to CFIS and choose **Upload Transactions from Spreadsheet** under **Step 1: Enter Transactions** in the left-hand menu.

2. Click to download a copy of the **Receipts** and **Expenses** templates available under **Download Templates**. Templates are available in the legacy Microsoft Excel (Excel 2003 and below) format as well as the current format (Excel 2007 and above). Most users should download the Excel 2007 templates.

3. In the **Additional Information** section at the bottom of the screen, you may click to download **Committee IDs**, **Local Candidate IDs**, **Unregistered IDs**, and **Expense Type Codes**. CFIS automatically populates address information for transactions with a Committee ID, a Local ID, or an Unregistered ID, saving you data entry time.

    a. Committee IDs identify committees and conduits registered with the Ethics Commission. You must use a Committee ID when logging a transaction involving another committee registered with the Ethics Commission.

    b. Local Candidate IDs identify candidate committees registered with filing officers other than the Ethics Commission.

    c. Unregistered IDs identify committees not registered in Wisconsin, such as a federal PAC.

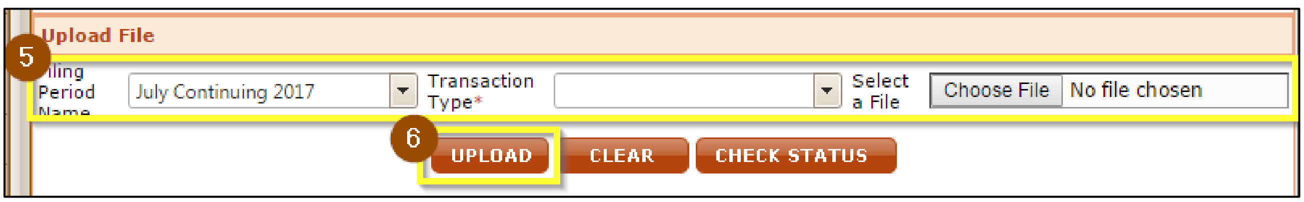
    d. Expense Type codes are used to categorize expenses. Every expense must have an expense type code. If you feel the Expense Type code does not adequately describe the nature of the expense, you should add more information in the **Comments** field.

4. Enter contributions your committee has received in the **Receipts** spreadsheet and all spending activity in the **Expenses** spreadsheet. Each spreadsheet template has an **Upload Help** sheet to guide you through the purpose of each field and whether the field is required.

> Be sure you are using the latest upload template. **Older upload templates will not work.** Steps for getting the latest template are listed in step 2.

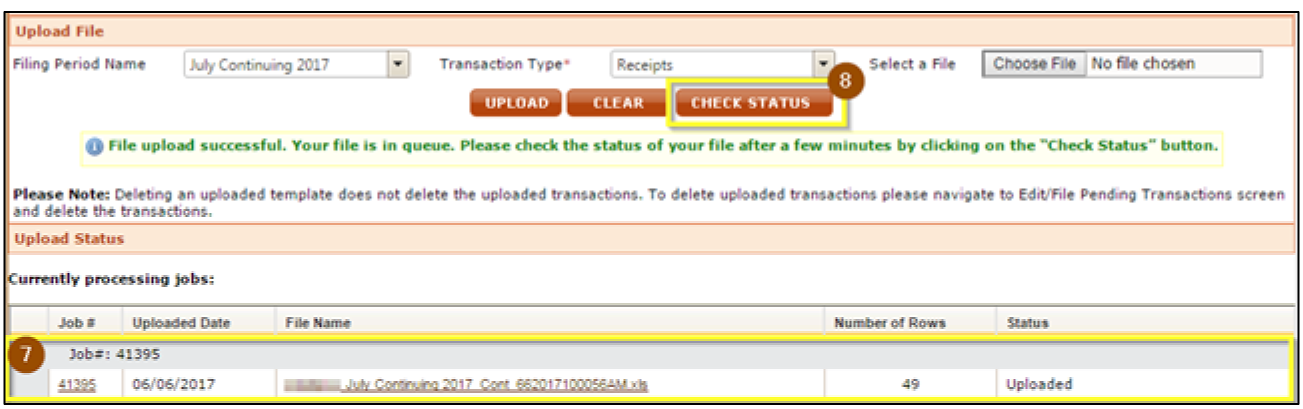
5. Once you have logged your transactions in your spreadsheets and saved those files, you are ready to upload. Return to the Upload Transactions screen. Choose the **Filing Period Name** for the transactions you are uploading, indicate in **Transaction Type** whether you are uploading receipts or expenses, and then choose the file you would like to upload.

6. Click **Upload**.

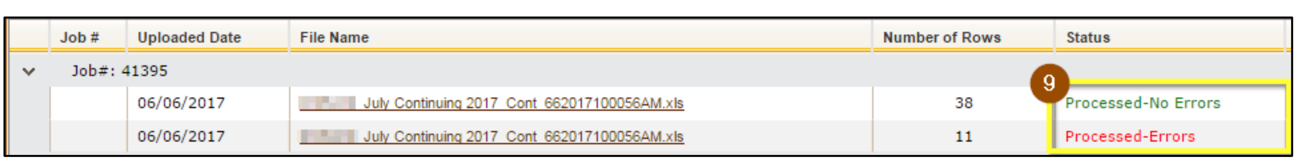


7. Your upload will now process. You can see the status in the **Upload Status** box.

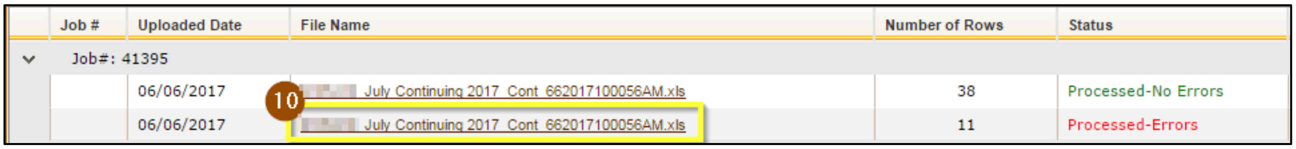
8. Click **Check Status** to refresh the page. Processing may take a few minutes.



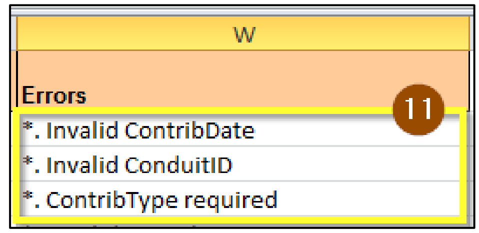
9. Once processed, the status of your upload will show Processed-No Errors for transactions that uploaded successfully or Processed-Errors for transactions the system was unable to process.



10. In this example, 38 of the 49 transactions were successfully uploaded. 11 transactions have errors that need to be addressed. To review and correct the errors, click the **File Name** in the row that has **Processed-Errors** in the **Status** column. This will download a spreadsheet where you can correct errors.



11. The final column of the spreadsheet lists the error that prevented the system from accepting the transaction in that row. Correct the errors in this document, save it, and reupload the document following the directions in this chapter. See the following error index below for help in correcting common errors.



Do not upload the original spreadsheet with errors for a second time. Any transactions that successfully processed will be duplicated. To correct errors, you should only upload the 'Errors' file described in steps 10 and 11.

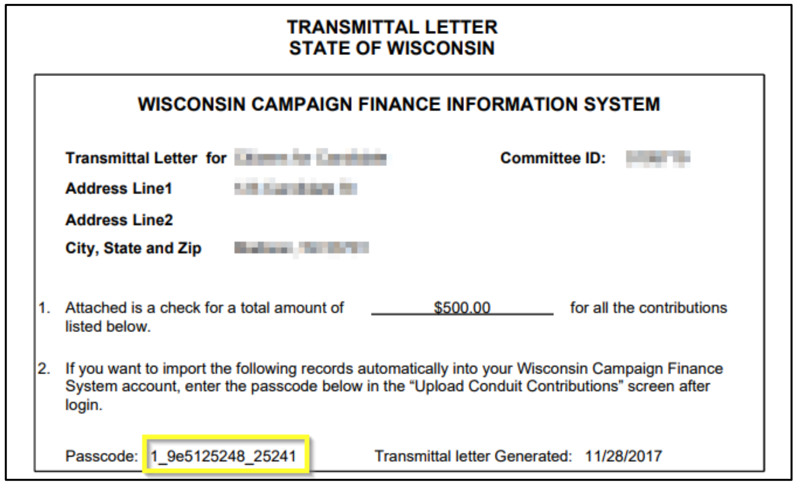
Sometimes committees upload an incorrect file and need to delete some or all of their uploaded transactions. You must go to the File Report/Edit Pending Transactions screen, search under the correct filing period, and delete the transactions there.

Common Upload Errors

Error	Definition
Business Type Required	The contributor type is business, so you must list the business type.
Business Name Required	The contributor type is business, so you must list the business name.
Committee ID Required	The contributor type is a registered committee/Registrant, so you must specify the committee's ID number.
Contrib Type Required	The transaction needs to have a contribution type.
Contributor Type Required	The contributor needs to have a contributor type.
First Name Required	The contributor type is an individual, so you must list the contributor's first name.
Invalid Conduit ID	The contributor type is a conduit contribution, so you must specify the conduit's Committee ID.
Invalid Contrib Date	The transaction has a date outside of the selected filing period. Correct the date if it is a typo or upload the transaction to the appropriate filing period.
Invalid Expenditure Date	Usually this is because the transaction date is outside of the reporting period, but may indicate another type of error.
Invalid State	The state must be a capitalized two-letter abbreviation. Ex: WI or IL.
Last Name Required	The contributor type is an individual, so you must list the contributor's last name.
Zip Should be Numeric *- or -* Zip Should be in Length (5/9)	Zip must be a five or nine digit number. If the zip begins with a zero, enter it with a leading apostrophe to ensure the upload preserves the full five digits. Ex: '02860. Do not use dashes.

Importing Conduit Contributions

Conduits can generate transmittal letters directly in CFIS that help you record the transaction on your finance report. Transmittal letters generated from CFIS, like the one seen to the right, contain a passcode that allows you to easily import the transaction without additional data entry.



TRANSMITTAL LETTER
STATE OF WISCONSIN

WISCONSIN CAMPAIGN FINANCE INFORMATION SYSTEM

Transmittal Letter for | Committee ID:
Address Line1
Address Line2
City, State and Zip

1. Attached is a check for a total amount of $500.00 for all the contributions listed below.

2. If you want to import the following records automatically into your Wisconsin Campaign Finance System account, enter the passcode below in the "Upload Conduit Contributions" screen after login.

Passcode: 1_9e5125248_25241 Transmittal letter Generated: 11/28/2017

If you have a passcode, follow these steps to record the contribution on your finance report:

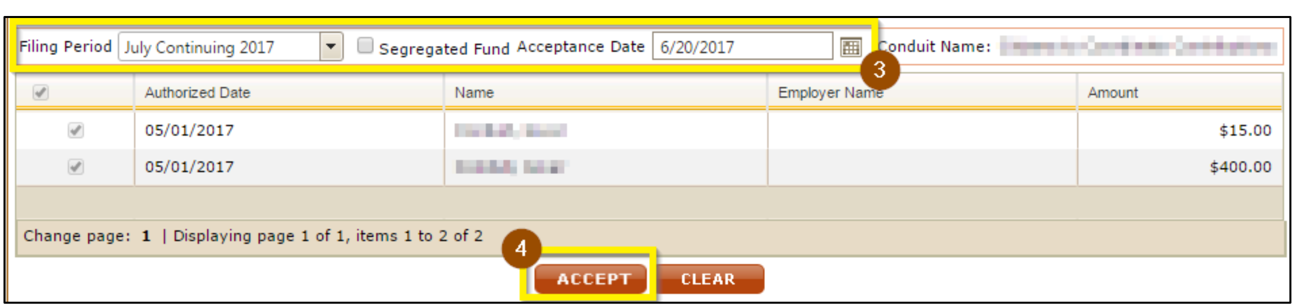
1. Click **Enter Conduit Transmittal Code** under **Step 1: Enter Transactions** in the left-hand menu.

2. Key the passcode into the **Enter Passcode** field and press **Submit**.

3. Enter the **Filing Period** and **Acceptance Date** for the contributions.

Once you press accept, you cannot change the filing period or acceptance date. If you choose the wrong value, you will need to delete the transactions and either manually log the contributions or contact the conduit and request a new passcode.

4. Press **Accept**.



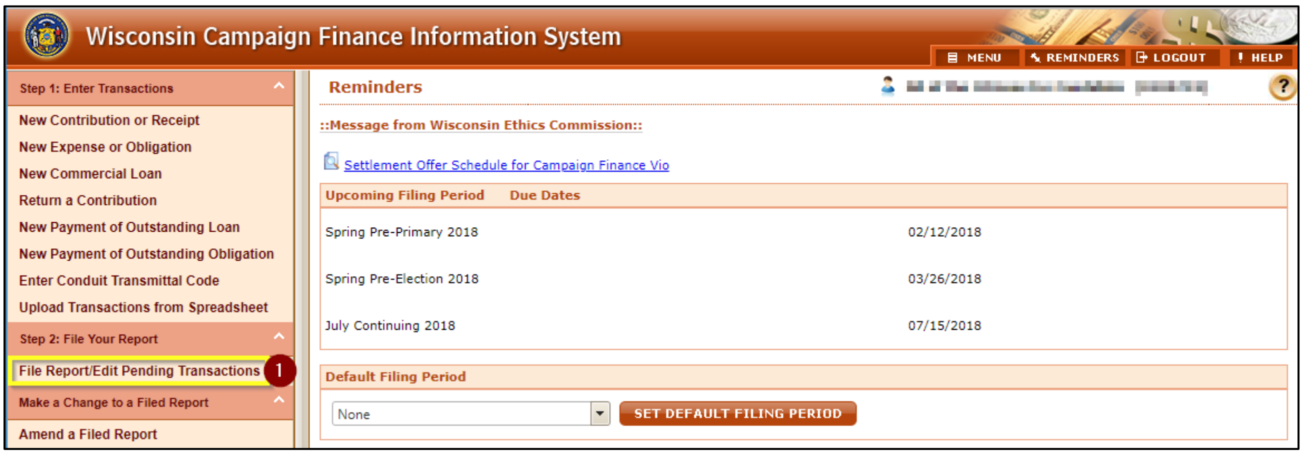
5. Your contributions will take a few moments to process. Click **Check Status** to confirm that the contributions were successfully loaded onto your finance report.

Filing Reports

All active, non-exempt committees must file a campaign finance report every six months, in January and July of each year. Additional election-related reports may be due depending on the activity and type of committee.

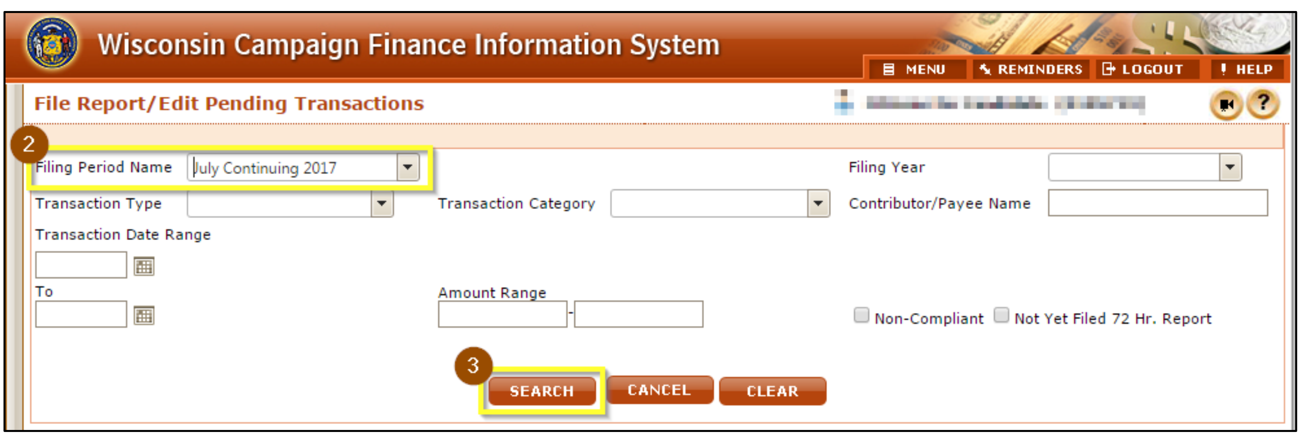
After you have uploaded or entered your transactions in CFIS as described in the Entering Transactions section on page **5**, follow these steps to file your report:

1. Click **File Report/Edit Pending Transactions** under **Step 2: File Your Report** from the left-hand menu.



2. In the top row, choose the **Filing Period Name** for the report you would like to file. If you are looking to file a 72-hour report, you can enter more search criteria to find just the transactions you need to file.

3. Press **Search**.



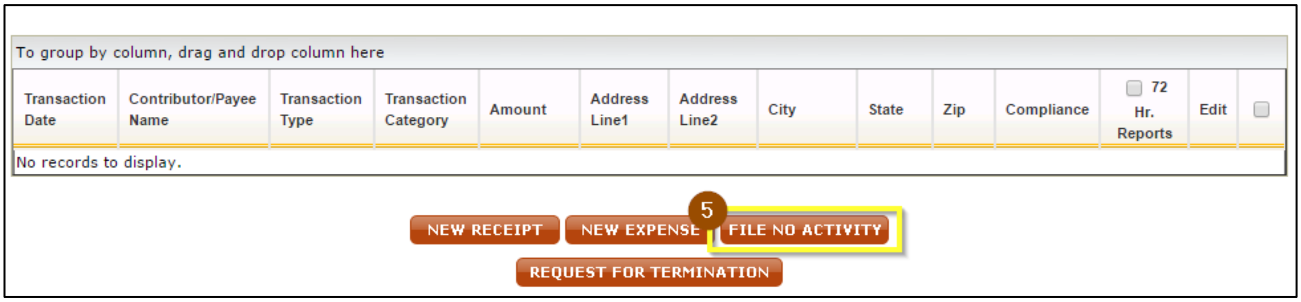
4. You should now see a full listing of transactions that met your search terms.

   - To file a **No Activity Report** (CF-2A), continue to page **10.**
   - To file a **Full Report with Activity** (CF-2), continue to page **12.**
   - To file a **72-Hour Report**, continue to page **14**.

Filing a No Activity Report

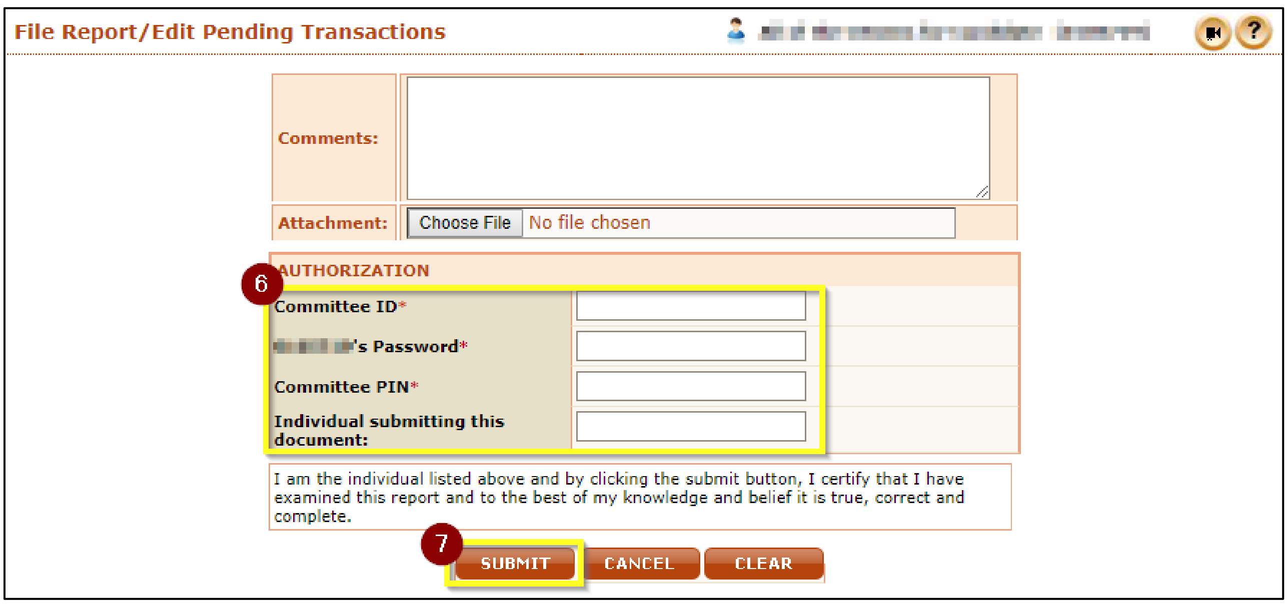
Continued from page 10

5. Click **File No Activity** at the bottom of the screen.



6. Complete your **Authorization** information to electronically sign your report. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.
7. Click **Submit**.

https://cfis.wi.gov/images/header_img.jpg

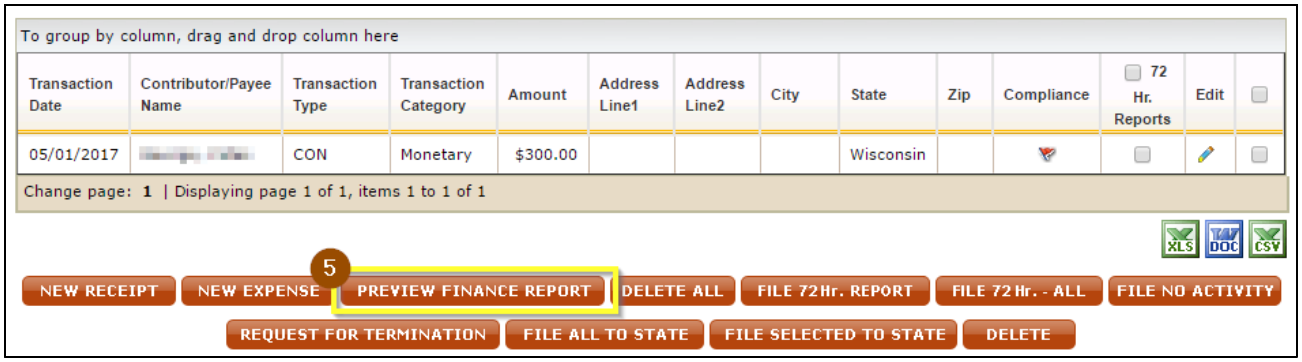


8. Your report is now filed! You can view your filed report by clicking **View/Print**. A copy of the report will also be emailed to the email addresses on file for your committee. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm your report has been correctly filed and your email address is correct.

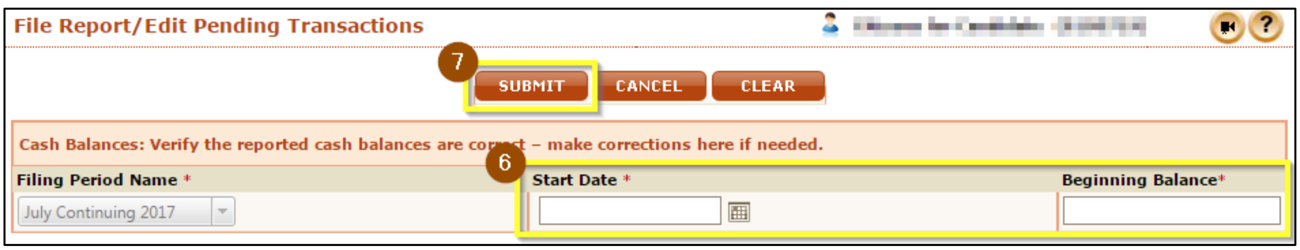
Filing a Full Report

Continued from page 10

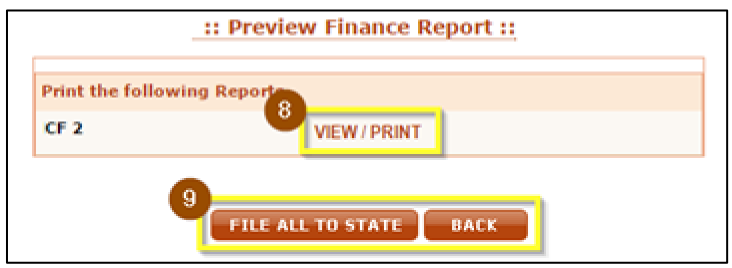
5. Prior to filing your report, you should preview the report to confirm that your totals are correct. Click **Preview Finance Report** at the bottom of the screen.



6. Enter the first date of the filing period in the **Start Date** field and the balance you started the period with in the **Beginning Balance** field.
7. Press **Submit**.



8. Press **View/Print** to open a PDF preview of your finance report. Confirm that the amounts listed on the cover page are accurate.
9. If the amounts listed on your report are accurate, click **File All to State**. If there are errors, click **Back** and correct your report before filing.

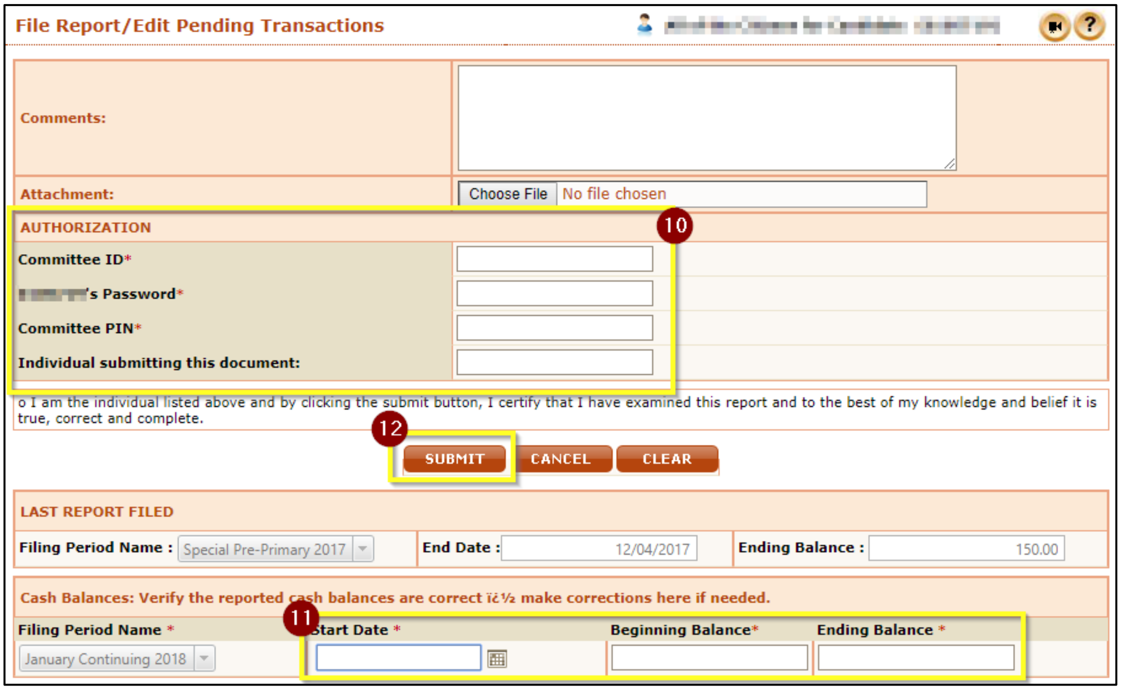


10. At the bottom of the page, enter the first date of the filing period in the **Start Date** field. Then enter the **Beginning Balance** and **Ending Balance** for the report. CFIS will not automatically calculate these balances for you. These balances should come from your bank statement (adjusted for items that have been reported but not yet cleared the bank) and should reconcile with the transactions you have reported.

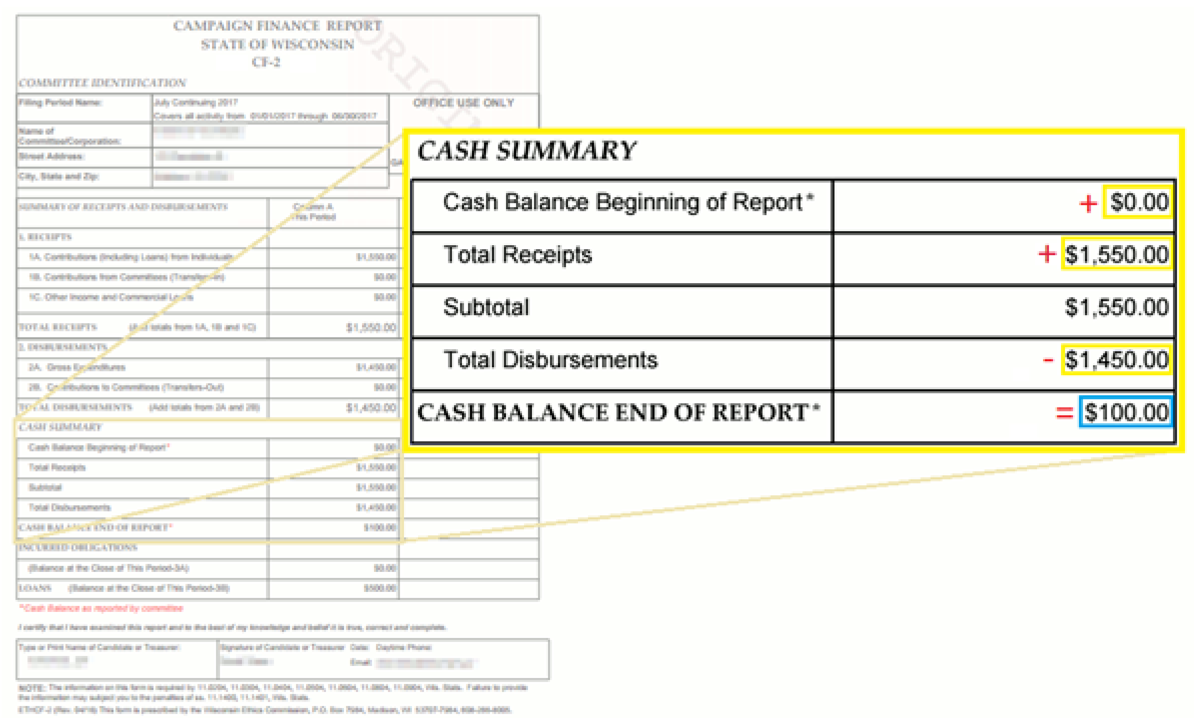
> Your beginning cash balance should always equal the ending cash balance of the previous filing period. If these numbers do not match, you have unreported activity or you've miscalculated your balance.

11. Complete your **Authorization** information to electronically sign your report. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.

12. Click **Submit**.



13. Your report is now filed! You will receive a PDF copy of the report via email. To confirm the accuracy of your report, click **View/Print** and confirm that your report balances. **Cash Balance Beginning of Report** plus **Total Receipts** minus **Total Disbursements** should equal **Cash Balance End of Report**. If the report doesn't balance, please review your records for unreported activity.

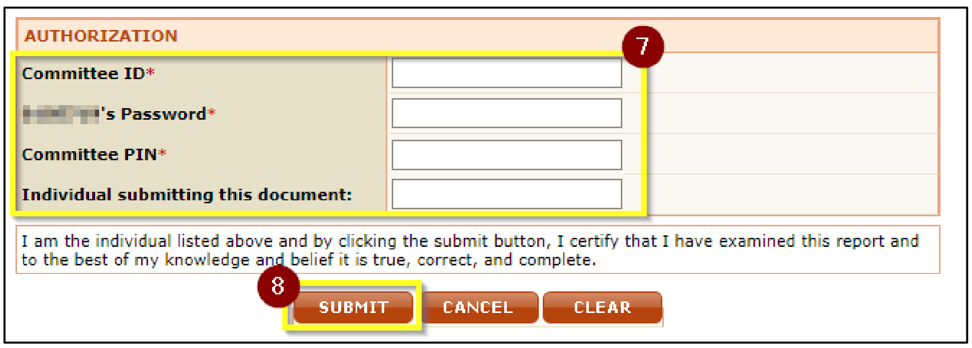


Filing a 72-Hour Report

Continued from page 10

5. Check the **72-Hour Reports** column for the transactions you would like to include. If you would like to include all transactions, skip to the next step.
6. Press **File 72-Hour Report** to file a report that includes just the transactions you checked the **72-Hour Reports** column for. To include all transactions for the filing period, click **File 72-Hour - All**.

7. Complete your **Authorization** information to electronically sign your report. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.
8. Click **Submit**.



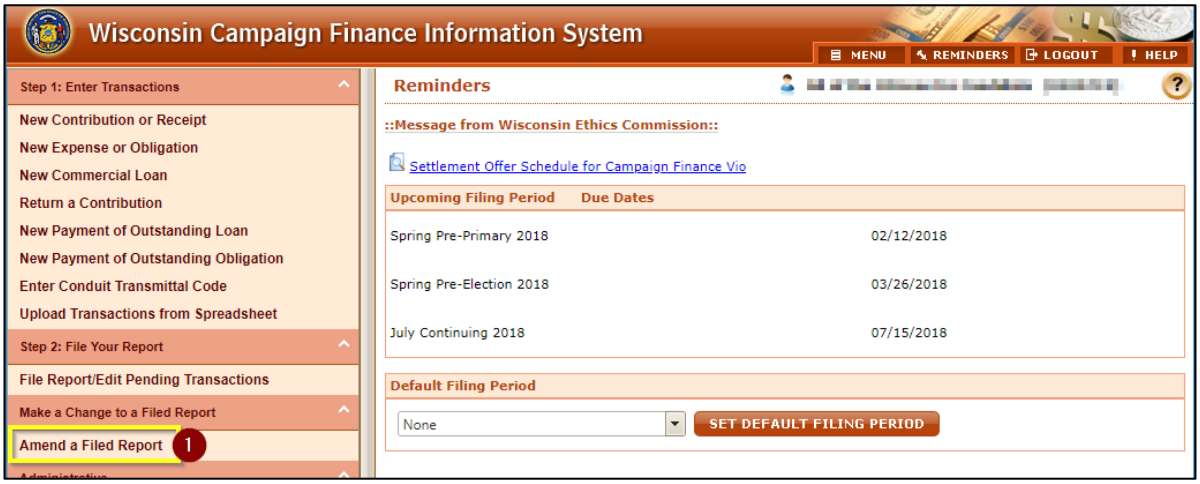
9. Your report is now filed! You can view your filed report by clicking **View/Print**. A copy of the report will also be emailed to the email addresses on file for your committee. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm your report has been correctly filed and your email address is correct.

Amending a Report

After a report is filed, committees might need to change or add information to their reports. Any amendment should be filed as soon as possible. When a user adds new transactions or changes previously filed transactions, the changes do not automatically appear on the previously filed report. In order for these changes to be viewable to the public, the report needs to be re-filed.

Choosing the Report to Edit

1. After you have logged in, click **Amend a Report** under **Make a Change to a Filed Report** from the left-hand menu.

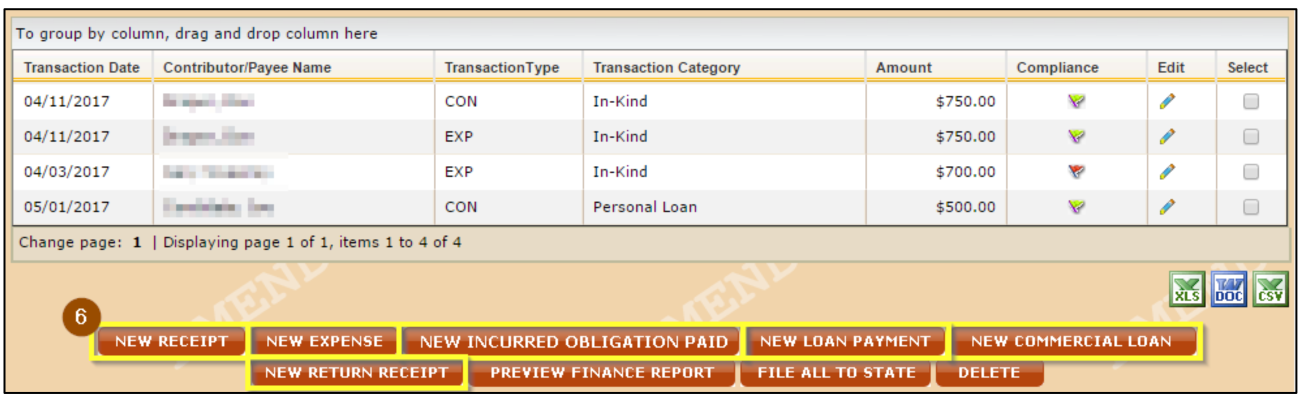


2. In the top row, choose the **Filing Period Name** for the report you would like to amend. If you are looking to edit a specific transaction, you can enter additional criteria to narrow down your results.
3. Press **Search**.

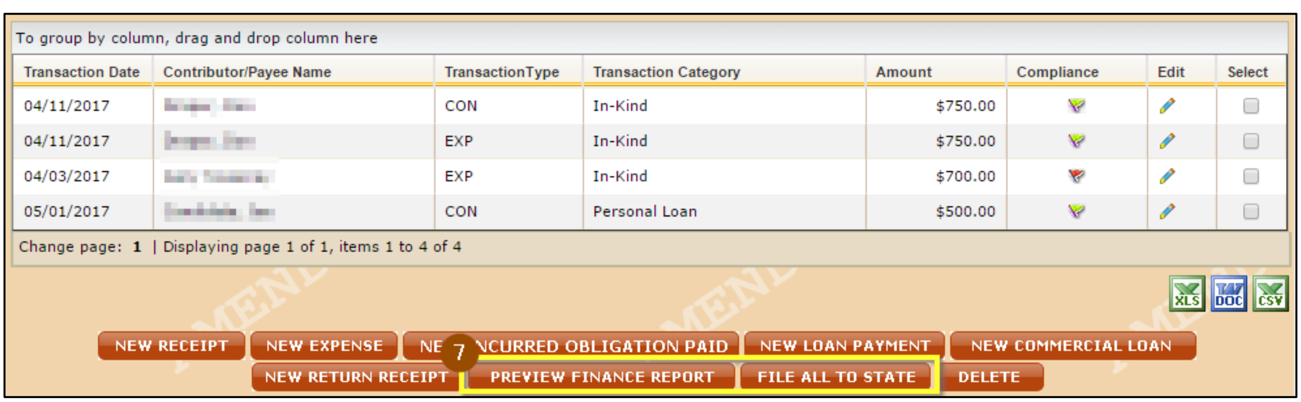
Deleting, Editing, and Adding New Transactions

4. All of your committee's transactions for the filing period you selected will show on the screen. To edit an existing transaction, click the pencil in the **Edit** column.
5. To delete a transaction, check the **Select Box** at the far right in the row and click **Delete** at the bottom of the window. You may select more than one transaction at a time to delete.

6. To add a new transaction, choose the button for the appropriate transaction type and complete all required fields.



7. Once you have completed all updates to your report, you are ready to refile. You may generate a PDF preview of your report using the **Preview Finance Report** option or you can skip this step and choose **File All to State**.



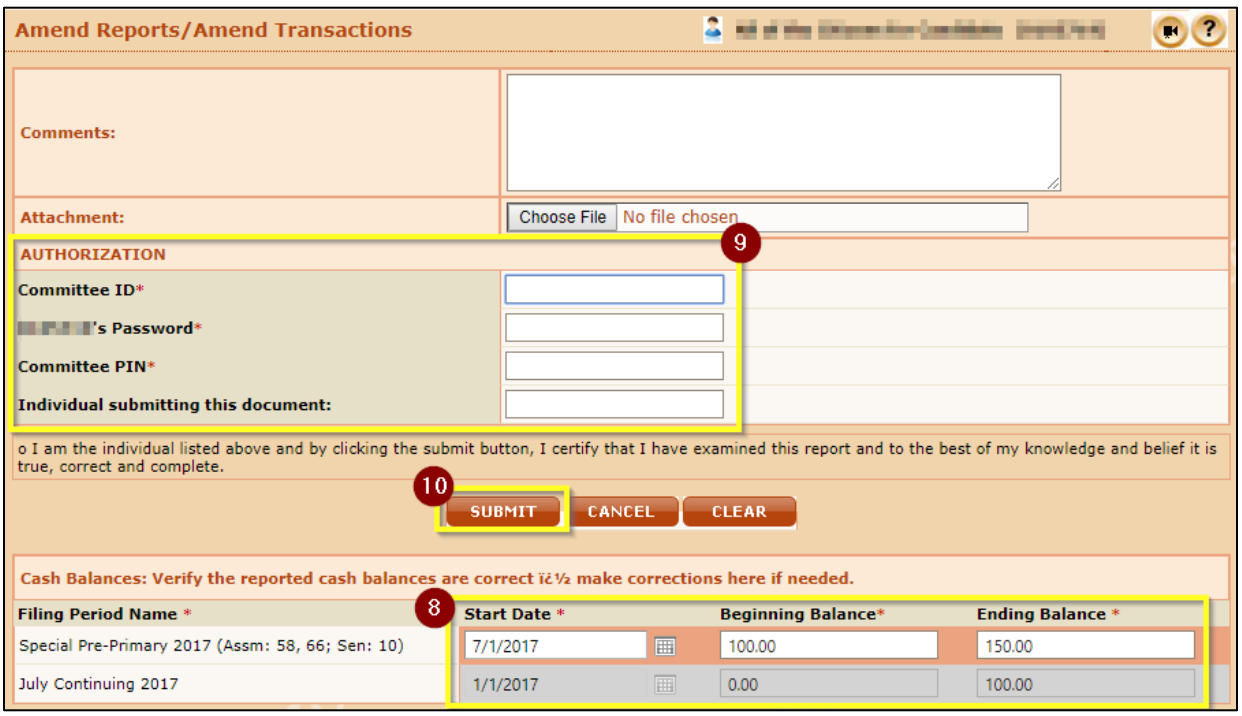
Updating Cash Balances and Filing the Amended Report

8. **CFIS will not automatically calculate the beginning and ending cash balance for your report.** If your corrections require you to adjust the beginning or ending cash balance, scroll below the authorization section and make corrections. These balances should come from your bank statement and should reconcile with the transactions you have reported. Cash Balances from your previously submitted reports will also be visible for reference.

> Your beginning cash balance should always equal the ending cash balance of the previous filing period.

9. Complete your **Authorization** information to electronically sign your report. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.

10. Click **Submit**.



11. Your report is now filed! You can view your filed report by clicking **View/Print**. A copy of the report will also be emailed to the email addresses on file for your committee. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm your report has been correctly filed and your email address is correct.

> **Best Practice**: After filing your report, view your filed report and confirm that the **Cash Balance Beginning of Report** field, plus the **Total Receipts** field, minus the **Total Disbursements** field, equals the **Cash Balance End of Report** field. If these fields do not balance, your report has an error in its transactions or in its reported cash balances.

Terminating a Committee

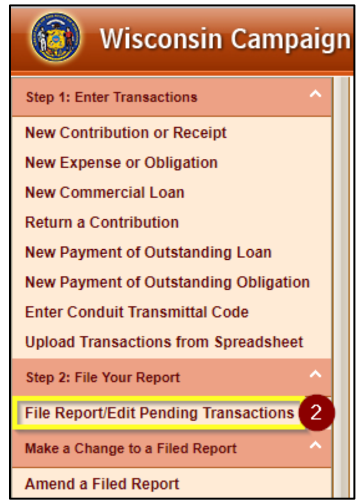
Eligibility

To be eligible to terminate your committee, each of the following must be true:

- Your committee must have a $0 cash balance $0 in outstanding debts and obligations. Wis. Stat. § 11.0105(1).
- Your committee must not have any pending transactions in CFIS.
- You must not be a candidate as defined by WIS. STAT. § 11.0101(1), which includes current officeholders. Current officeholders must retain their committee registration through their last day in office.

> If you are not eligible to terminate, you may instead qualify for exemption. Details on exemption are available under **Frequently Asked Questions**.

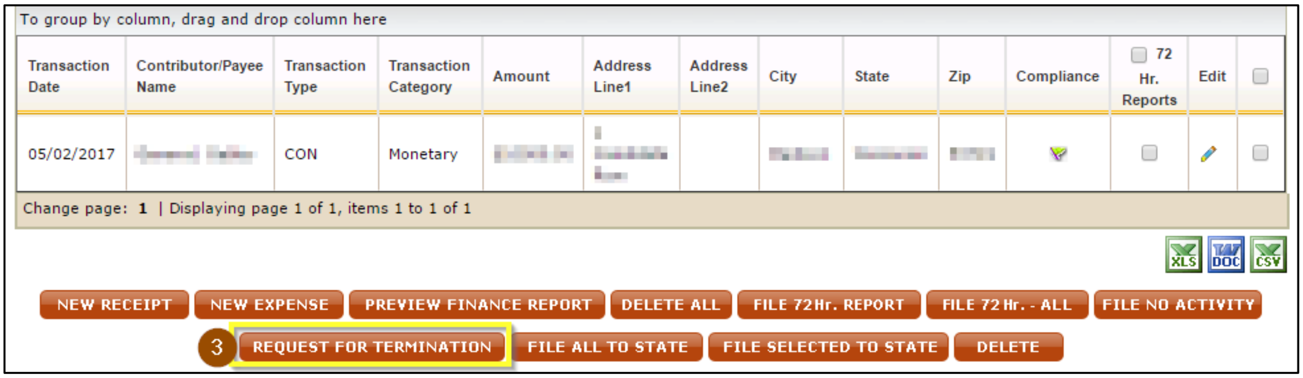
Filing a Termination Report & Requesting Termination



1. Enter all transactions in CFIS since your last report as described in the Entering Transactions section on page **5**. Be sure that your committee will have a $0 balance, no outstanding incurred obligations, and no outstanding loans. If you do not need to file any new transactions, continue to step 2.

2. Choose **File Report/Edit Pending Transactions** under **Step 2: File Your Report** from the left-hand menu. On this screen, choose the filing period for your final report and click **Search** at the bottom of the window. Any transactions you have for the filing period will show now.

3. Click **Request for Termination**. If you have any transactions for the period that have not yet been filed, you will see a pop-up saying you must file those transactions. Click **OK**. You will then see another pop-up asking if you want to file those transactions. Click **OK**. If you have no transactions to file, you will be asked to select a Termination Reason from the drop-down. Select the correct reason and click the Submit button. You must file a final report – in this case, follow the directions to file a No Activity report on page **11**.



3. Complete the Authorization information and fill in your cash balance information. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.
4. A copy of the filed report will also be emailed to the email addresses on file for your committee. Please verify that there is a "TERMINATION" watermark across the upper-right hand corner of the page. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm your report has been correctly filed and your email address is correct.

Registering and Filing for Conduits

Registering a Conduit

1. Go to https://cfis.wi.gov. Click **Register a Conduit** on the left-hand menu.

2. Read through the Conduit Registration Information and click **Continue** at the bottom of the screen.
3. Enter your conduit's information in the required fields and click **Continue** at the bottom of the screen. Required fields are marked with a red asterisk (*).
4. Review and confirm the accuracy of the information you have entered. If there are any errors in your registration, click the **Step 1** button to return to the previous screen. If your registration information is correct, click **Register**.
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E-mail CampaignFinance@wi.gov	**Fax** (608) 264-9319
Mail Wisconsin Ethics Commission PO Box 7125 Madison, WI 53707-7125	**Hand Delivery** 101 E Wilson St. Suite 127 Madison, WI 53703

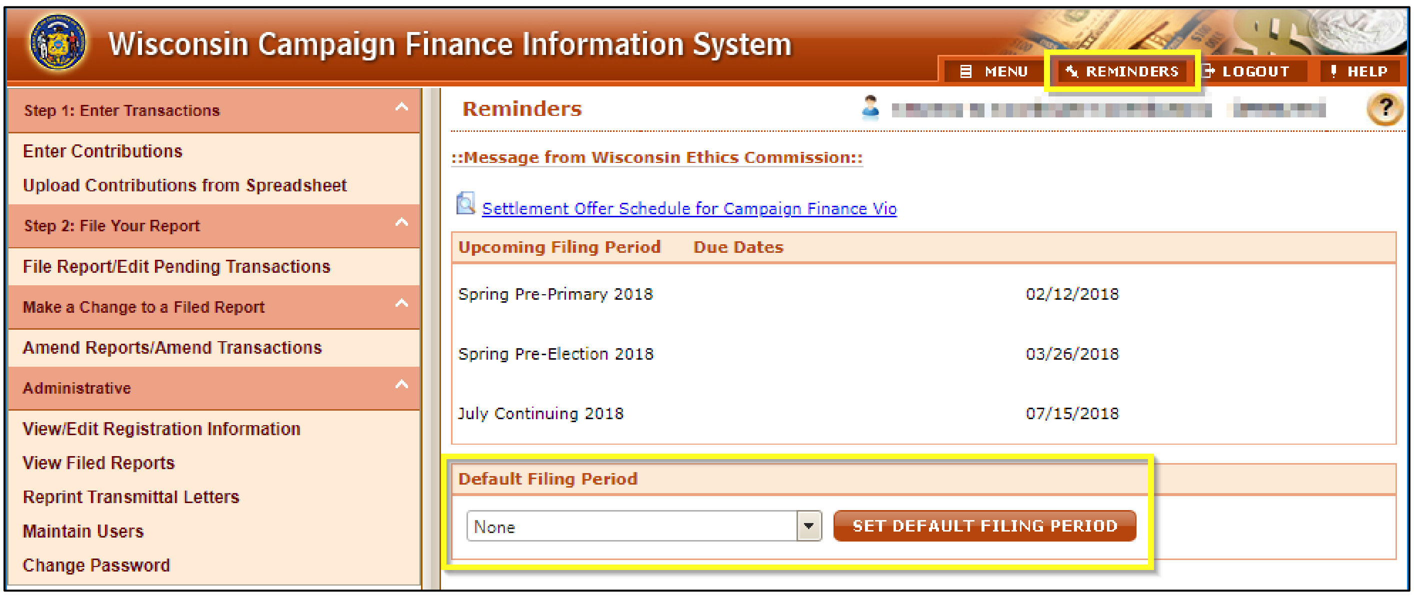
7. Once your signed CF-9 registration form has been received by the Ethics Commission, you will receive an email with the Committee ID that you will use to login to the system and your system-generated password. To ensure you remember your password, we recommend that you immediately change the password to something you will remember.

Entering Transactions for Conduits

Filing Periods in CFIS

CFIS groups transactions into filing periods. A default filing period is set at the system-level and it applies to all committees. Conduits are not required to file pre-primary or pre-election reports, so the default period may apply to other committees that file more frequently, but may not be correct for your transactions. You can manually change the filing period when you are entering a transaction, or you can change the default filing period for your login session if you will be entering many transactions for a specific filing period.

- To change the default filing period for your login session, go to the **Reminders** screen and choose from the **Default Filing Period** drop-down menu. This is the first screen you see after logging in. If you need to return to this screen, you can click the **Reminders** button on the top right of the screen.

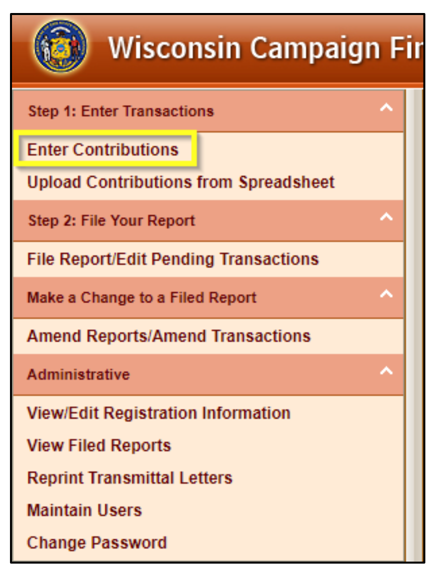


Recording Conduit Contributions in CFIS

- Once logged in to CFIS, choose **Enter Contributions** under **Step 1: Enter Contributions** from the left-hand menu.

- Complete all required information to log the contribution. Required fields are marked with a red asterisk (*).

  - You may log many transactions at once. Pressing Submit will save your transactions to CFIS, but will not file them. Continue onto the Generating Transmittal Letters and Filing Conduit Reports sections.



Uploading Conduit Contributions from a Spreadsheet

To upload contributions directly into CFIS using a spreadsheet, you will need to download a copy of the upload template and the codes you will use to indicate the recipient.

1. Login to CFIS and choose **Upload Contributions from Spreadsheet** under **Step 1: Enter Transactions** from the left-hand menu.

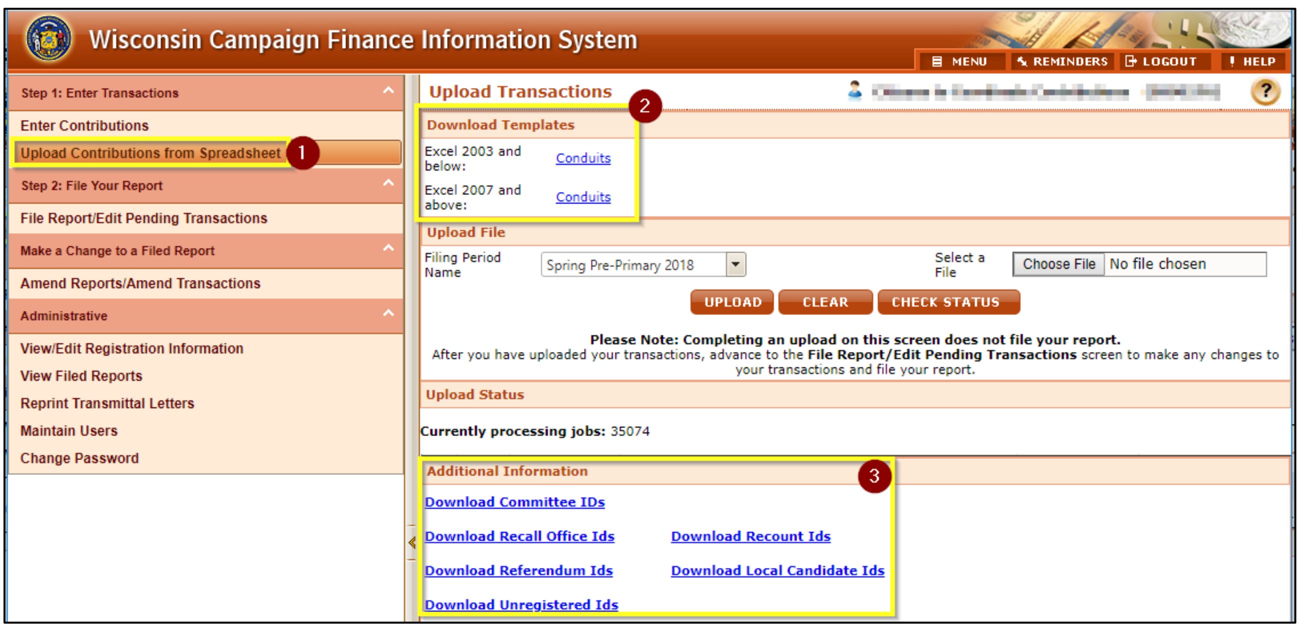
2. Click to download a copy of the **Conduits** template available under **Download Templates**. The template is available in the legacy Microsoft Excel (Excel 2003 and below) format as well as the current format (Excel 2007 and above). If you are unsure which to download, download the Excel 2007 templates.

3. In the **Additional Information** section at the bottom of the screen, you may click to download **Committee IDs**, **Local Candidate IDs**, and **Unregistered IDs**.

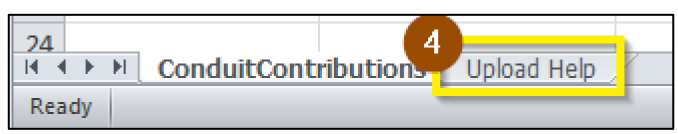
    a. Committee IDs identify committees and conduits registered with the Ethics Commission. You must use a Committee ID when logging a transaction involving another committee registered with the Ethics Commission.

    b. Local Candidate IDs identify candidate committees registered with filing officers other than the Ethics Commission.

    c. Unregistered IDs identify committees not registered in Wisconsin, such as a federal PAC.



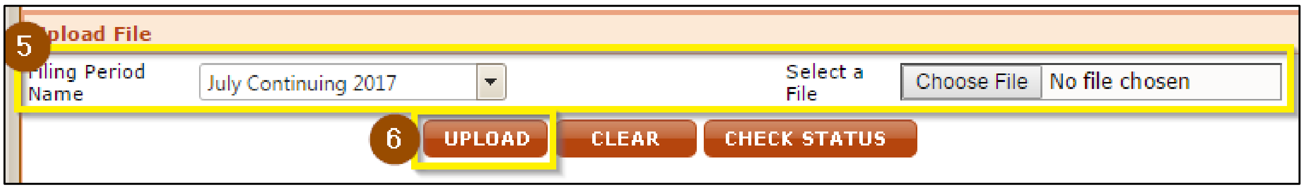
4. Enter contributions your committee has received in the **Conduit Contributions** spreadsheet. The spreadsheet template has an **Upload Help** sheet to guide you through the purpose of each field and whether the field is required.



Be sure you are using the latest upload template. **Older upload templates will not work.** Steps for getting the latest template are listed in step 2.

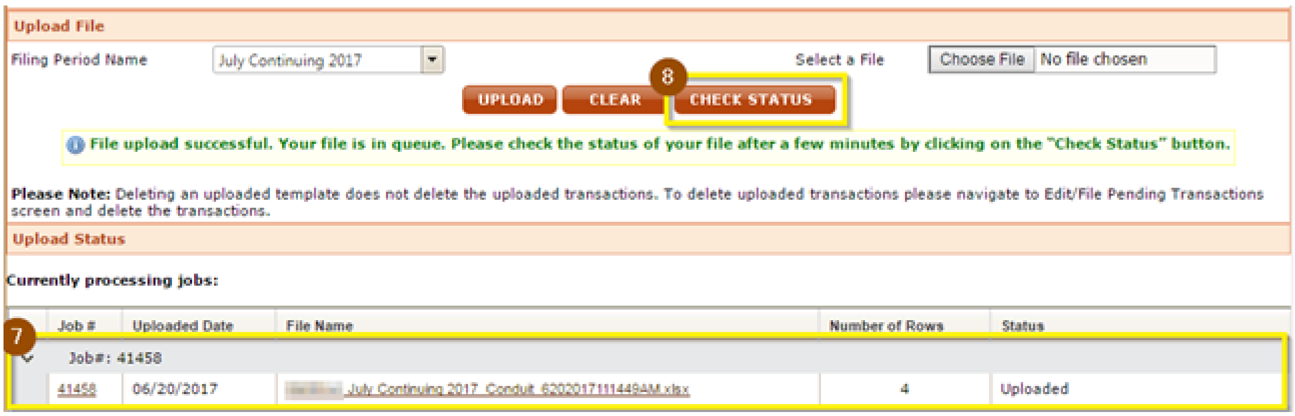
5. Once you have logged your contributions in your spreadsheet and saved the file, you are ready to upload. Return to the Upload Transactions screen. Choose the **Filing Period Name** for the contributions you are uploading and then choose the file you would like to upload.

6. Click **Upload**.

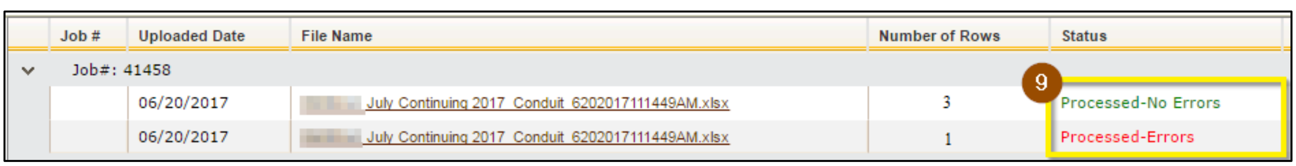


7. Your upload will now process. You can see the status in the **Upload Status** box.

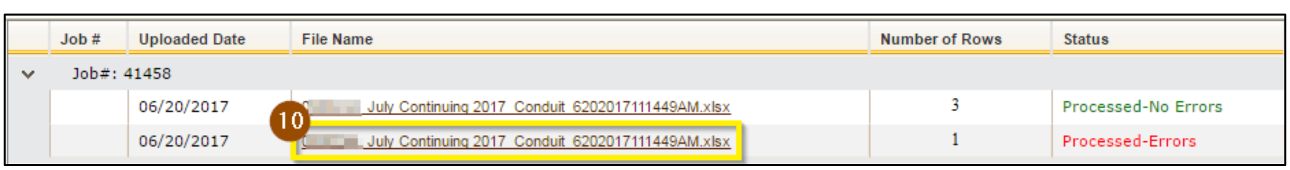
8. Click **Check Status** to refresh the page. Processing may take a few minutes.



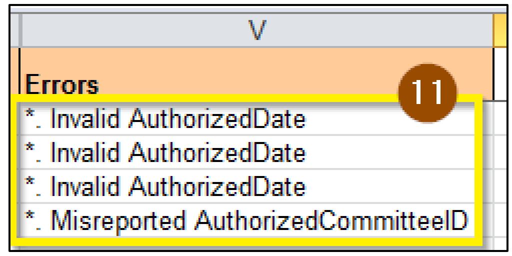
9. Once processed, the status of your upload will show **Processed-No Errors** for transactions that uploaded successfully or **Processed-Errors** for transactions the system was unable to process.



10. In this example, 3 of the 4 transactions were successfully uploaded. 1 transaction has an error that need to be addressed. To review and correct the error, click the **File Name** in the row that has **Processed-Errors** in the **Status** column. This will download a spreadsheet where you can correct errors.



11. The final column of the spreadsheet lists the error that prevented the system from accepting the transaction in that row. Correct the errors in this document, save it, and reupload the document following the directions in this chapter. See the following error index for help in correcting common errors.



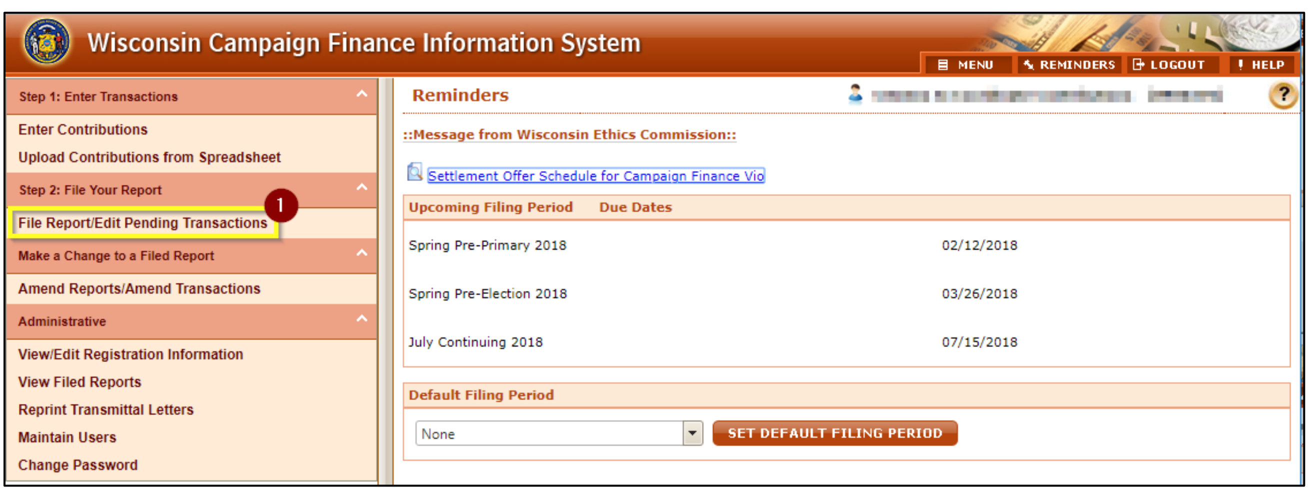
Common Upload Errors

Error	Definition
First Name Required	The contributor type is an individual, so you must list the contributor’s first name.
Invalid Authorized Date	The contribution has a date outside of the selected filing period. Correct the date if it is a typo or upload the transaction to the appropriate filing period.
Invalid State	The state must be a capitalized two-letter abbreviation. Ex: WI or IL.
Last Name Required	The contributor type is an individual, so you must list the contributor’s last name.
Redirected Contributions cannot be done to State, Federal, or Local Candidates	Redirected is listed as the Transaction Type and a Committee ID for a state, federal, or local candidate has been entered. Redirected funds may not be contributed to state, federal, or local candidates.
Zip Should be Numeric *- or -* Zip Should be in Length (5/9)	Zip must be a five or nine-digit number. If the zip begins with a zero, enter it with a leading apostrophe to ensure the upload preserves the full five digits. Ex: ‘02860. Do not use dashes.

Generating Transmittal Letters

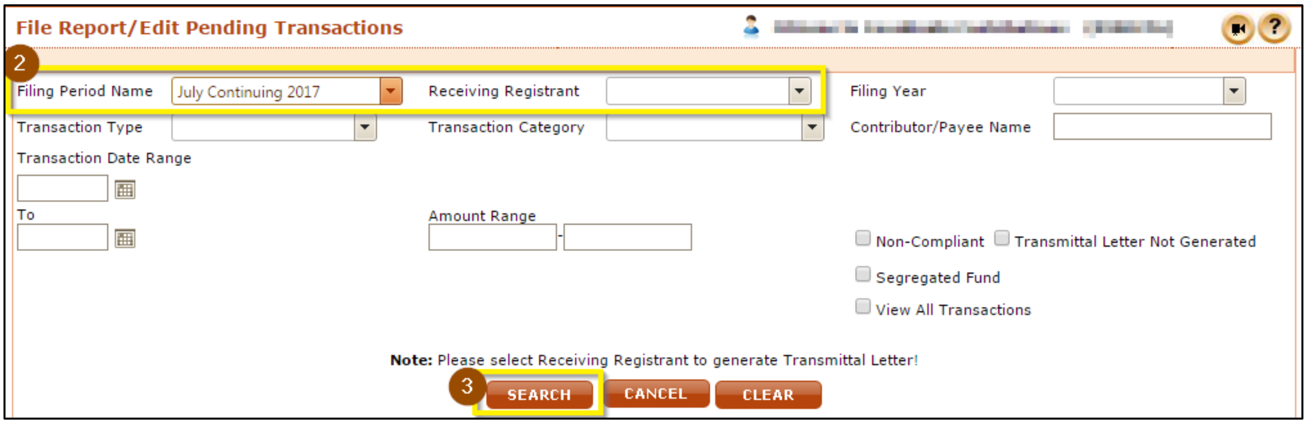
CFIS can automatically general transmittal letters for you. The letter will include a passcode that the receiving committee can enter to automatically add the transactions to their finance report, saving them time on data entry. To generate a transmittal letter:

1. Click **File Report/Edit Pending Transactions** under **Step 2: File Your Report** from the left-hand menu.



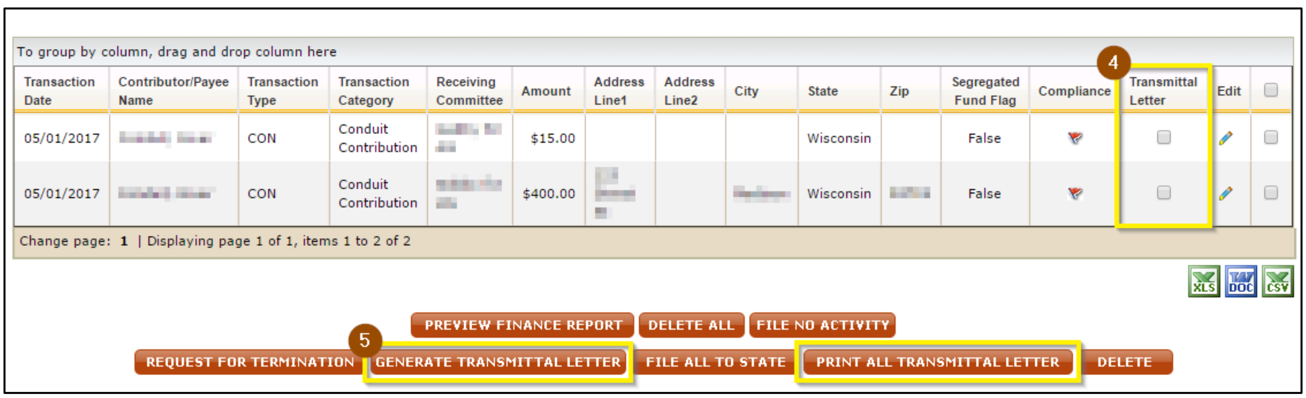
2. In the top row, choose the **Filing Period Name** and the **Receiving Registrant** for the letter you would like to print. <u>You must enter a Receiving Registrant to generate a transmittal letter</u>.

3. Press **Search**.



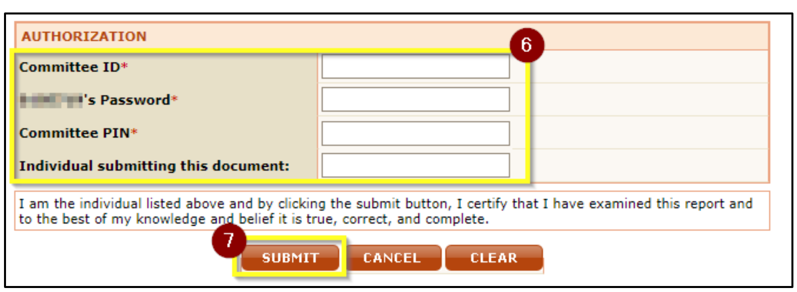
4. Check the **Transmittal Letter** column for the contributions you would like to generate letters for. If you would like to include all contributions, skip to the next step.

5. Press **Generate Transmittal Letter** to generate a letter for the contributions you checked the **Transmittal Letter** column for. To include all contributions for that receiving committee, **Print all Transmittal Letter**.



6. Complete your **Authorization** information to electronically sign your transmittal letter. Your **Username/Committee ID** is your committee's 7-digit ID number that you use to login to CFIS. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.

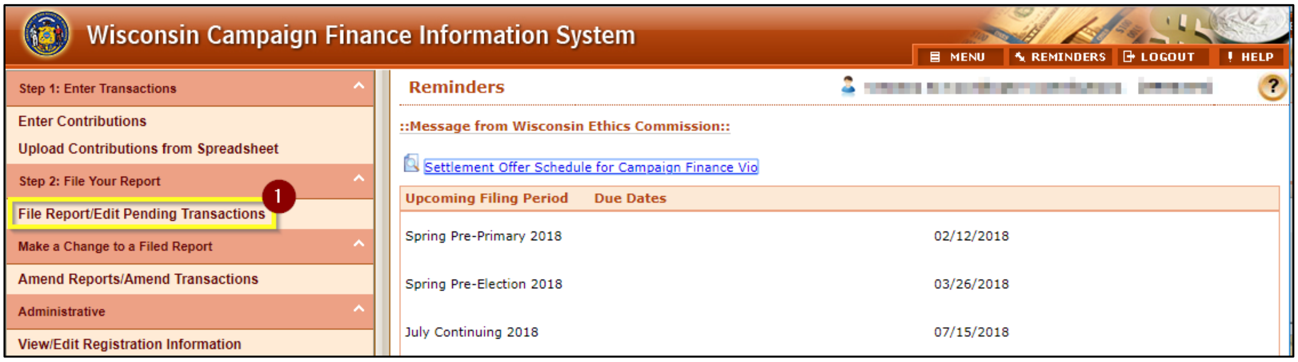
7. Click **Submit**.



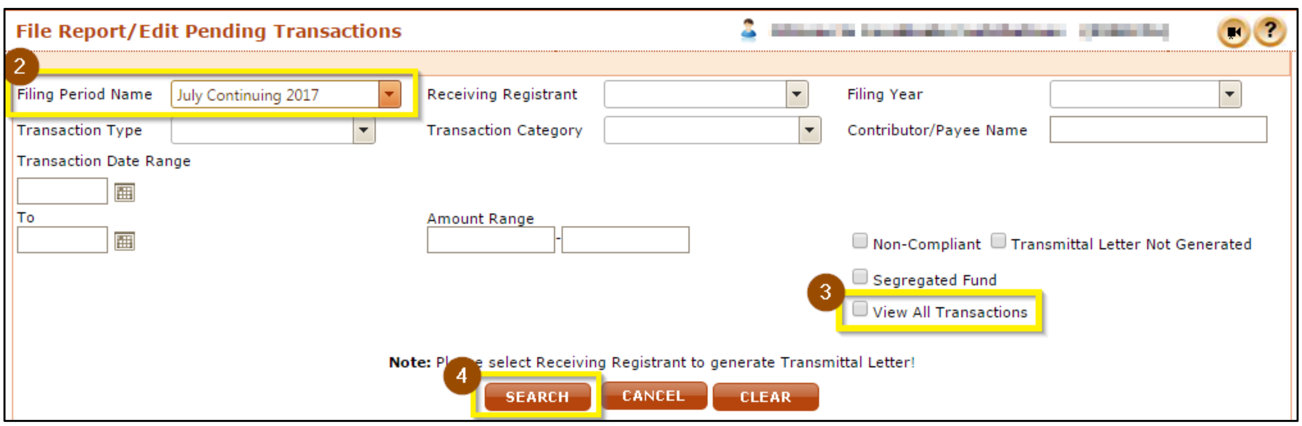
8. Your letter has been generated! You can print or save a PDF copy of your letter by clicking **View/Print**. A copy of the letter will also be emailed to the email addresses on file for your conduit. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm that your letter has been correctly generated and that your email address is correct.

Filing Conduit Reports

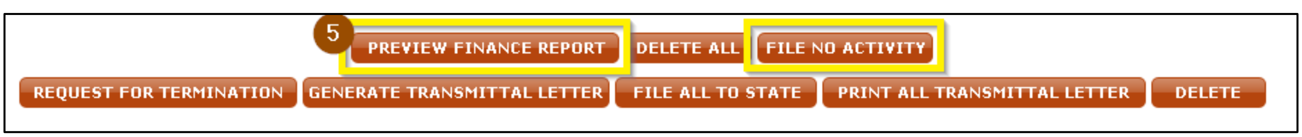
1. Login to CFIS and click **File Report/Edit Pending Transactions** under **Step 2: File Your Report** from the left-hand menu.



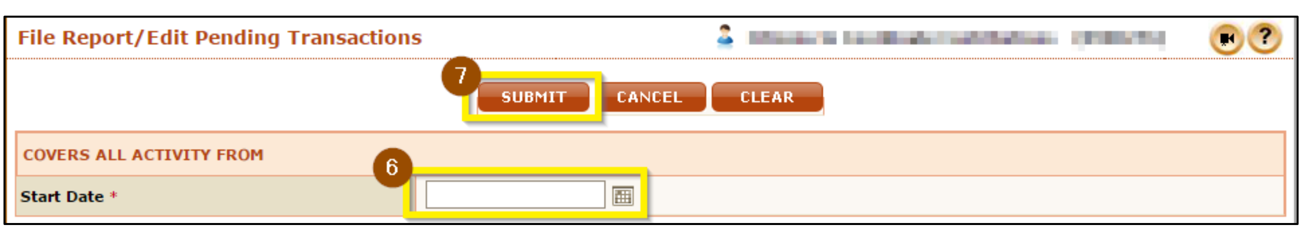
2. Choose the **Filing Period Name** for the contributions you'd like to file.
3. Check the **View All Transactions** box to ensure you file all contributions you've recorded for the period.
4. Press **Search**.



5. You will see a listing of all of your contributions. Click **Preview Finance Report** to continue filing. If you have had no activity for the period, choose **File No Activity**.

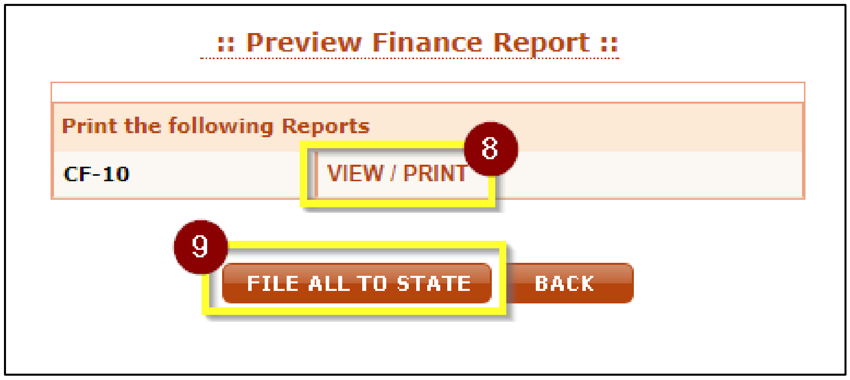


6. Enter the first date of the period for the report you're filing in the **Start Date** field.
7. Press **Submit**.



8. Click **View/Print** to review your report. Confirm that you report contains all contributions you made for the filing period.

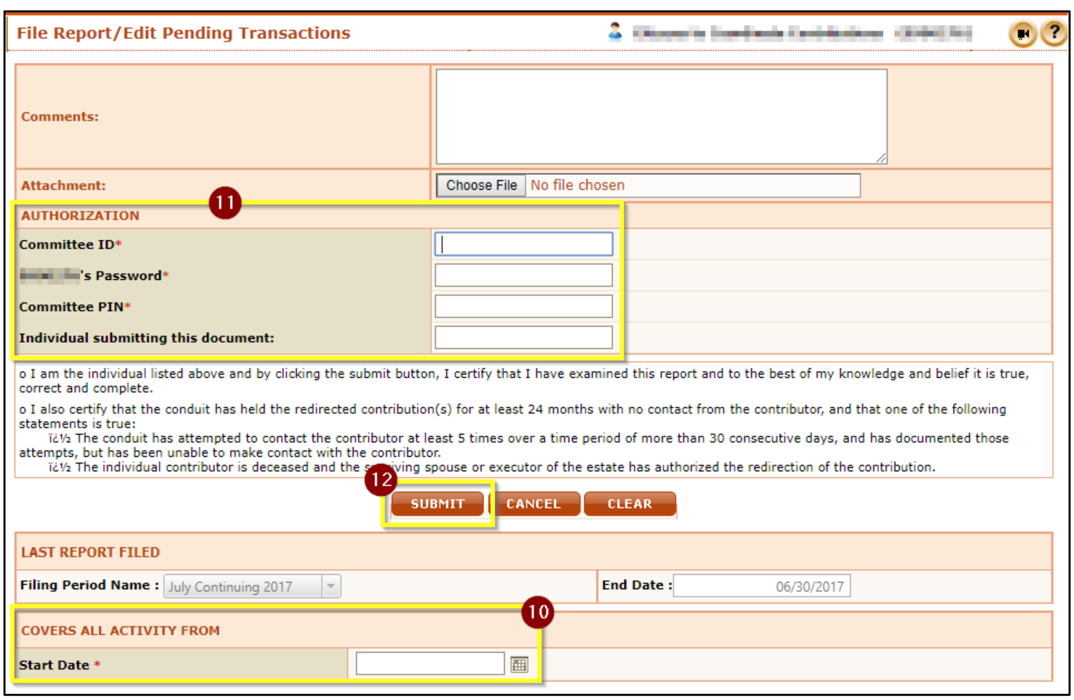
9. After confirming that your report content is accurate, click **File All to State**.



10. Enter the first date of the period for the report you're filing in the **Start Date** field. You may need to scroll down to see this field.

11. Complete your **Authorization** information to electronically sign your transmittal letter. If you have forgotten your PIN, review **What is my committee's PIN?** on page **29**.

12. Press **Submit**.



13. Your report is now filed! You can view your filed report by clicking **View/Print**. A copy of the report will also be emailed to the email addresses on file for your committee. If you do not receive a confirmation email, please contact Ethics Commission staff to confirm your report has been correctly filed and your email address is correct.

Frequently Asked Questions

I forgot my username. How do I look it up?

Your username is your Committee ID. If you've forgotten your Committee ID, you can look it up using the **Registrant Search**.

1. Click **View Registrants** from the left-hand menu.

2. Click **Continue**, confirming that you will not use data in CFIS for any commercial purpose.

3. Enter your committee name in the **Candidate/Committee Name** box and click **Search**. Your ID will be listed in the **Committee ID** column.

I forgot my password. How do I reset it?

If you have forgotten your password, you can reset your password from the CFIS homepage.

1. Click **Forgot Password** in the Registrant Login box.

2. Enter your **username** and the **email address** on file for the committee or candidate. A new password will be sent to the email addresses on file for the candidate, committee, treasurer, and primary

contact. Your username will be your Committee ID. Be sure to enter the full 7-digit number including the leading zero.

3. Click **Submit**.

Your new password will be sent to the email addresses on file for the committee, candidate, treasurer, and primary contact. After you've login to the system with your new password, you should change your password from the system-generated password to something you will remember.

My account is locked. What do I do?

CFIS locks your account after 3 consecutive failed attempts to login or to complete the authorization section when completing your report or registration. The system will automatically unlock your account in 15 minutes. If you have forgotten your password, reference the above instructions for help resetting it. Be sure that you are logging in and authorizing with your complete 7-digit Username/Committee ID. All committee IDs other than IDs for Independent Expenditure Committees begin with a leading zero.

How do I change my password?

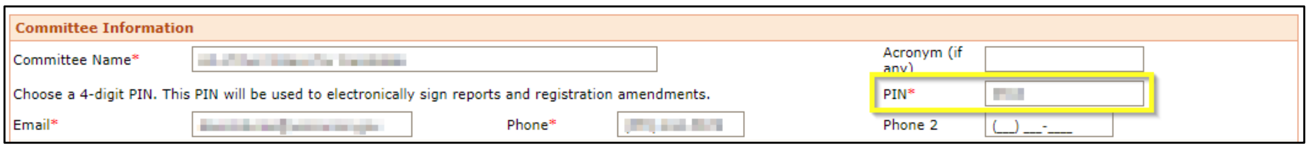
Once you have logged into CFIS, you can access the **Change Password** menu under the **Administrative** section from the left-hand sidebar.

What is my committee's PIN?

Your committee's PIN is used along with your password for e-signature when submitting reports or amending your registration. You may choose any four-digit number to serve as your PIN. Public versions of your committee registration will not show your PIN. You can view or change your committee's PIN on the **View/Edit Registration Information** screen under the **Administrative** section of the left-hand menu.

1. Login to CFIS and click **View/Edit Registration Information** under the **Administrative** section in the left-hand sidebar.

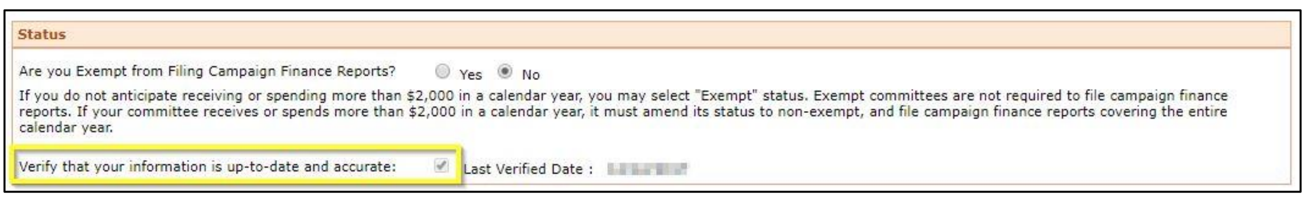
2. Scroll to the **Committee Information** or **Conduit Information** section and reference the **PIN** field.



NOTE: If you are changing your PIN, you will need to use your old PIN one last time to sign the update changing your PIN.

How do I verify my committee's registration information?

When you first login, you may be taken directly to the registration information page. This is because your committee information has not been verified or amended recently. Confirm that all contact information is up-to-date, then in the **Status** box, check the box confirming that your information is up-to-date and accurate. You will then need to enter your authorization information to confirm your identity.

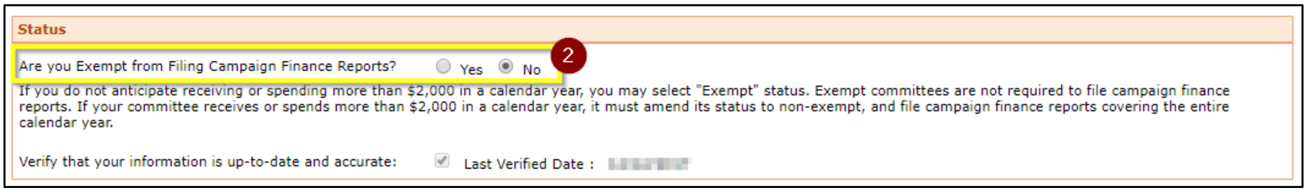


How do I file for exemption so I don't have to submit reports?

If you will not raise or spend more than $2,000 in a calendar year, you may choose to exempt your committee from filing campaign finance reports. If you do not file for exemption, you must continue to file campaign finance reports. WIS. STAT. § 11.0104. If you wish to file for exemption:

1. Login to CFIS and click **View/Edit Registration Information** under the **Administrative** section in the left-hand sidebar menu.

2. In the Status section, indicate that you are exempt from filing campaign finance reports.



3. Click **Submit** at the bottom of the screen. You will then need to enter your authorization information to confirm your identity.

You must confirm your committee's exemption from filing campaign finance reports each year. To confirm your exemption, verify your registration following the steps outlined under **How do I verify my committee's registration information?**

Additional Resources

Compliance Guides

The Ethics Commission publishes guides to assist committees in complying with reporting requirements. The guides are available online at: https://ethics.wi.gov/Pages/CampaignFinance/CampaignFinance.aspx

Contact the Ethics Commission

Reach the Ethics Commission staff by email at CampaignFinance@wi.gov or by phone at (608) 266-8123 Monday through Friday, between the hours of 7:45 AM and 4:30 PM.

Additional information about the Commission is available online at https://ethics.wi.gov.