



# 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, they do not automatically appear on the previously filed report. In order for these changes to be viewable to the public, the entire report needs to be re-filed.

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

The screenshot shows the 'Wisconsin Campaign Finance Information System' interface. The left-hand menu is expanded to 'Step 2: File Your Report', and the 'Amend a Filed Report' option is highlighted with a red circle and the number '1'. The main content area displays 'Reminders' with a table of upcoming filing periods and due dates.

Upcoming Filing Period	Due Dates
Spring Pre-Primary 2018	02/12/2018
Spring Pre-Election 2018	03/26/2018
July Continuing 2018	07/15/2018

Below the table, there is a 'Default Filing Period' section with a dropdown menu set to 'None' and a 'SET DEFAULT FILING PERIOD' button.

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**.

The screenshot shows the 'Amend Reports/Amend Transactions' search form. The 'Filing Period Name' dropdown is highlighted with a red circle and the number '2', and it is set to 'July Continuing 2017'. The 'SEARCH' button is highlighted with a red circle and the number '3'. The form includes fields for Transaction Type, Transaction Category, Filing Year, Contributor/Payee Name, Transaction Date Range, Amount Range, and a checkbox for Non-compliant. At the bottom, there are buttons for 'NEW RECEIPT', 'NEW EXPENSE', 'NEW INCURRED OBLIGATION PAID', 'NEW LOAN PAYMENT', 'NEW COMMERCIAL LOAN', 'NEW RETURN RECEIPT', and 'FILE NO ACTIVITY'.

- All of your committee's transactions for your selected filing period will show on the screen. To edit an existing transaction, click the pencil in the **Edit** column.
- 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.

To group by column, drag and drop column here

Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Edit	Select
04/11/2017	Example, LLC	CON	In-Kind	\$750.00			<input type="checkbox"/>
04/11/2017	Example, LLC	EXP	In-Kind	\$750.00			<input type="checkbox"/>
04/03/2017	Example, LLC	EXP	In-Kind	\$700.00			<input type="checkbox"/>
05/01/2017	Example, LLC	CON	Personal Loan	\$500.00			<input type="checkbox"/>

Change page: 1 | Displaying page 1 of 1, items 1 to 4 of 4

XLS DOC CSV

NEW RECEIPT NEW EXPENSE NEW INCURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMMERCIAL LOAN  
 NEW RETURN RECEIPT PREVIEW FINANCE REPORT FILE ALL TO STATE DELETE

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

To group by column, drag and drop column here

Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Edit	Select
04/11/2017	Example, LLC	CON	In-Kind	\$750.00			<input type="checkbox"/>
04/11/2017	Example, LLC	EXP	In-Kind	\$750.00			<input type="checkbox"/>
04/03/2017	Example, LLC	EXP	In-Kind	\$700.00			<input type="checkbox"/>
05/01/2017	Example, LLC	CON	Personal Loan	\$500.00			<input type="checkbox"/>

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NEW RECEIPT NEW EXPENSE NEW INCURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMMERCIAL LOAN  
 NEW RETURN RECEIPT PREVIEW FINANCE REPORT FILE ALL TO STATE DELETE

- 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**.

To group by column, drag and drop column here

Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Edit	Select
04/11/2017	Example, LLC	CON	In-Kind	\$750.00			<input type="checkbox"/>
04/11/2017	Example, LLC	EXP	In-Kind	\$750.00			<input type="checkbox"/>
04/03/2017	Example, LLC	EXP	In-Kind	\$700.00			<input type="checkbox"/>
05/01/2017	Example, LLC	CON	Personal Loan	\$500.00			<input type="checkbox"/>

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NEW RECEIPT NEW EXPENSE NEW INCURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMMERCIAL LOAN  
 NEW RETURN RECEIPT PREVIEW FINANCE REPORT FILE ALL TO STATE DELETE

- Before you file your report, confirm that your **Beginning Balance** and **Ending Balance** are accurate at the bottom of the page. CFIS will not automatically calculate these balances for you. These balances should come from your bank statement 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.

- Complete your **Authorization** information to electronically sign your report. If you have forgotten your PIN, review **What is my committee's PIN?** at the bottom of this page.
- Click **Submit**.

**Amend Reports/Amend Transactions**

Comments:

Attachment: Choose File No file chosen

**AUTHORIZATION**

Committee ID\*

Password\*

Committee PIN\*

Individual submitting this document:

o I am the individual listed above and by clicking the submit button, I certify that I have examined this report and to the best of my knowledge and belief it is true, correct and complete.

SUBMIT CANCEL CLEAR

Cash Balances: Verify the reported cash balances are correct  $\frac{1}{2}$  make corrections here if needed.

Filing Period Name *	Start Date *	Beginning Balance*	Ending Balance *
Special Pre-Primary 2017 (Assm: 58, 66; Sen: 10)	7/1/2017	100.00	150.00
July Continuing 2017	1/1/2017	0.00	100.00

- 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.

## 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 can view or change your committee's PIN following the directions below:

- Login to CFIS and click **View/Edit Registration Information** under the **Administrative** section in the left-hand sidebar.
- Scroll to the **Committee Information** or **Conduit Information** section at the bottom of the page and reference the **PIN** field.

**Committee Information**

Committee Name\*

Choose a 4-digit PIN. This PIN will be used to electronically sign reports and registration amendments.

Email\*

Phone\*

Acronym (if any)

PIN\*

Phone 2