

Amending a report with activity in CFIS



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. Any new transactions or changes made to a transaction will not automatically appear on a previously filed report. In order for these changes to be viewable to the public, the entire report needs to be re-filed.

Amending a Report in CFIS

In rare cases, there will be transactions saved under **Edit/File Pending Transactions** and under **Late/Amend Transactions**. This usually happens when a report is filed and new transactions are then uploaded into the same filing period. Before amending a report, you should check the **Edit/File Pending Transactions** screen, and make sure that the filing period you're amending does not appear. If there are transactions in the **Edit/File Pending Transactions** screen for that filing period, you must first file the report from the **Edit/File Pending** screen, then file it again from the **Late/Amend Transactions** screen.

1. From the left-hand menu, click **Late/Amend Transactions**.
2. In the top row of the search screen, select the **Filing Period Name** from the dropdown. Click **Search**.
3. Review your transactions from the grid result for accuracy. You can narrow your search results by choosing to use more than one filter option.

Late/Amend Transactions Your Committee Name Here 010XXXX

Filing Period Name: July Continuing 2014
 Transaction Type: [Dropdown]
 Transaction Category: [Dropdown]
 Filing Year: [Dropdown]
 Contributor/Payee Name: [Text Box]
 Transaction Date Range: To [Date Picker]
 Amount Range: [Text Box] - [Text Box]
 Non-compliant

SEARCH CLEAR CANCEL

To group by column, drag and drop column here

Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Edit	Select
05/01/2014	Smith, Joe	CON	Monetary	\$100.00			

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

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

4. Use the **New Receipt** or **New Expense** button to add new transactions. To update an existing transaction, search for the transaction and use the **Edit** pencil to open it. Amend the transaction, then **Save** and **Submit** as necessary.
5. The report can be filed by either clicking **Preview Finance Report** to review the entire report before filing or clicking **File All to State**, which will not generate a report to preview.
 - a. **Preview Finance Report**



Campaign Finance Procedures

- i. To preview the report, click **Preview Finance Report** at the bottom of the **Late/Amend Pending Transactions** screen.

CASH BALANCES		
Filing Period Name *	Start Date *	Beginning Balance *
Spring Pre-Election 2014	1/1/2014	1,234.56

- ii. Find the reporting period that is being amended. Review the date and beginning balance of the report. If necessary, change the date the report began and beginning balance. Click **Submit**.
- iii. Click **View/Print** report to preview a pdf version of the report.
 1. If everything is correct, click **File All to State**.
 2. If information needs to be changed on the report, repeat Steps 1 through 5.
- iv. Find the reporting period that is being amended. Verify the start date, beginning and ending balance of the report. If necessary, change the date the report began, beginning or ending balance. NOTE: If the cash balances of subsequent reports need to be changed, you must refile each subsequent report separately, to make sure the reports in CFIS reflect the correct balances. You cannot amend multiple reports at once.
- v. Notes and attachments are not required, but can be included.

CASH BALANCES			
Filing Period Name *	Start Date *	Beginning Balance *	Ending Balance *
Fall Pre-Primary 2012	7/1/2012	1,234.56	0.00
July Continuing 2012	1/1/2012	2,000.00	1,234.56

- vi. Enter your electronic signature. Your signature should include your committee's seven-digit GAB ID number, your unique password, the last four (4) digits of the bank account number, and the name of the person filing. If you do not know the last four (4) digits of the bank account number you can check this information by clicking on **View/Edit Registration Information** on the left hand side.
- vii. Click **Submit**. This will take you to another screen where you can view or print the report. Click on **View/Print** to print the report. Your report has now been filed, and you should receive a confirmation email with a PDF copy of the report attached.

b. File All to State

- i. Find the reporting period that is being amended. Verify the start date, beginning and ending balance of the report. Notes and attachments are not required, but can be included.
- ii. Enter your electronic signature. Your signature should include your committee's seven-digit GAB ID number, your unique password, the last four (4) digits of the bank account number, and the name of the person filing. If you do not know the last four (4) digits of the bank account number you can check this information by clicking on **View/Edit Registration Information** on the left hand side.



Campaign Finance Procedures

- iii. Click **Submit**. This will take you to another screen where you can view or print the report. Click on **View/Print** to print the report. Your report has now been filed, and you should receive a confirmation email with a PDF copy of the report attached.
 2. The amended report will continue to show transactions as they were originally reported, but they will be flagged to show they have changed. Changes will display in italicized script and in different colors (depending on the change made) to indicate what amendments were made from the original report.
 - a. A transaction in blue is an original transaction that has been changed. It will be labeled Amend – Org.
 - b. A transaction in black is an updated transaction, whether new or changed. It will be labeled Amend – New.
 - c. A transaction in red has been deleted. It will be labeled Amend – Del.