

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 <u>https://cfis.wi.gov</u>. 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.

(1) Wisconsin Campaign Fin	ance Information System	
Specify New Committee Type	STEP 1 STEP 2	STEP 3 STEP 4
Committee Type		
Committee Type*	Sub Committee*	Party Affiliation*

- 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 <u>CampaignFinance@wi.gov</u>	Fax (608) 264-9319
Mail	Hand Delivery
Wisconsin Ethics Commission	101 E Wilson St.
PO Box 7125	Suite 127
Madison, WI 53707-7125	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.
- 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.



Status
Are you Exempt from Filing Campaign Finance Reports? Yes No If you do not anticipate receiving or spending more than \$2,000 in a calendar year, you may select "Exempt" status. Exempt committees are not required to file campaign finance reports. If your committee receives or spends more than \$2,000 in a calendar year, it must amend its status to non-exempt, and file campaign finance reports covering the entire calendar year.
Verify that your information is up-to-date and accurate: 🖉 Last Verified Date :

- 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**.

AUTHORIZATION	5			
Committee ID*				
s Password*				
Committee PIN*				
Individual submitting this document:				
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.				
6 SUBMIT CANCEL CLEAR				

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

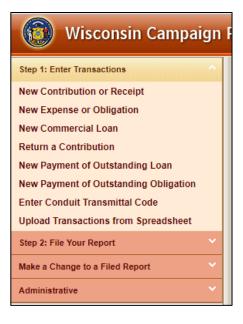
CFIS groups transactions into filing periods. The system will record transactions to the current filing period by default. You can manually change the filing period when you are entering a transaction, or you can change the default filing period for your login session if you will be entering many transactions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

Wisconsin Campaign Finance Information System						
Step 1: Enter Transactions	Reminders	<u> </u>	illulite (3)	and to Cardini	A parameter	?
New Contribution or Receipt	::Message from Wisconsin E	thics Commission::				
New Expense or Obligation						
New Commercial Loan	Settlement Offer Schedule	for Campaign Finance Vio				
Return a Contribution	Upcoming Filing Period	Due Dates				
New Payment of Outstanding Loan	July Continuing 2018		07	/15/2018		
New Payment of Outstanding Obligation						
Enter Conduit Transmittal Code	Default Filing Period					
Upload Transactions from Spreadsheet	News	SET DE	FAULT FILIN			
Step 2: File Your Report	None	SET DE		SPERIOD		
File Report/Edit Pending Transactions						

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.

Wisconsin Campaign Finance Information System						
Step 1: Enter Transactions	Upload Transactions	🔓 (wile data inc. (1999)) 👘 🥐				
New Contribution or Receipt	Download Templates					
New Expense or Obligation New Commercial Loan	Excel 2003 and below: <u>Receipts</u> <u>Expenses</u>					
Return a Contribution	Excel 2007 and above: <u>Receipts Expenses</u>					
New Payment of Outstanding Loan	Upload File					
New Payment of Outstanding Obligation	Filing Period Name Spring Pre-Primary 2018 Transaction Typ	e* Select a File Choose File No file chosen				
Enter Conduit Transmittal Code	UPLOAD	CLEAR CHECK STATUS				
Upload Transactions from Spreadsheet	Please Note: Completing a	upload on this screen does not file your report.				
Step 2: File Your Report	After you have uploaded your transactions, advance to the File Rep	ort/Edit Pending Transactions screen to make any changes to your transactions and file your report.				
File Report/Edit Pending Transactions	Upload Status					
Make a Change to a Filed Report	Currently processing jobs: 35074					
Amend a Filed Report	Job # Uploaded Date File	Name Number of Rows Status				
Administrative		3				
View/Edit Registration Information	_ Additional Information					
View Filed Reports Maintain Users	Download Committee IDs					
Maintain Users Change Password	Download Recall Office Ids Download Recount Ids					
	Download Referendum Ids Download Local Candidate	lds				
	Download Unregistered Ids ExpenseType Codes					

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



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.

Uploa	Upload File							
Filing	Period Na			Transaction Type*		STATUS		File No file chosen
and d	Please Note: Deleting an uploaded template does not delete the uploaded transactions. To delete uploaded transactions please navigate to Edit/File Pending Transactions screen and delete the transactions.							
	Currently processing jobs:							
	Job #	Uploaded Date	File Name			Number of Rows	Status	i i i i i i i i i i i i i i i i i i i
0	7 Job#: 41395							
	<u>41395</u>	06/06/2017	July Continu	ing 2017 Cont 662017100	056AM xls	49	Uploa	ded

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.

	Job #	Uploaded Date	File Name	Number of Rows	Status
~	Job#:4	1395			
		06/06/2017	July Continuing 2017 Cont 662017100056AM.xls	38	Processed-No Errors
		06/06/2017	July Continuing 2017 Cont 662017100056AM.xls	11	Processed-Errors

 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.

	Job #	Uploaded Date	File Name	Number of Rows	Status
~	Job#:	41395			
		06/06/2017	July Continuing 2017 Cont 662017100056AM.xls	38	Processed-No Errors
		06/06/2017	July Continuing 2017 Cont 662017100056AM.xls	11	Processed-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.

W	
Errors	n
*. Invalid ContribDate	
*. Invalid ConduitID	
*. ContribType required	



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



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.

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	Zip must be a five or nine digit number. If the zip begins with a zero, enter it with a
- or -	leading apostrophe to ensure the upload preserves the full five digits. Ex: '02860. Do not
Zip Should be in Length (5/9)	use dashes.

Common Upload Errors

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.

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

	TRANSMITTAL LETTER STATE OF WISCONSIN							
	WISCONSIN CAMPAIGN FINANCE INFORMATION SYSTEM							
	Transmittal Letter for Letter for Committee ID: Committee ID: Address Line1 Address Line2 City, State and Zip							
1.	Attached is a check for a total amount of							
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							

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

Wisconsin Campaign	n Finance Information System	
Step 1: Enter Transactions	Reminders	🕹 Ministra Olivera da Candidata (1941) 40
New Contribution or Receipt	::Message from Wisconsin Ethics Commission::	
New Expense or Obligation	Settlement Offer Schedule for Campaign Finance Vio	
New Commercial Loan		
Return a Contribution	Upcoming Filing Period Due Dates	
New Payment of Outstanding Loan	Spring Pre-Primary 2018	02/12/2018
New Payment of Outstanding Obligation		
Enter Conduit Transmittal Code	Spring Pre-Election 2018	03/26/2018
Upload Transactions from Spreadsheet		
Step 2: File Your Report	July Continuing 2018	07/15/2018

- 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.

✓ 05/01/2017 \$15.00						
\$400.0						
Image: 05/01/2017 Image: 05/01/2017 \$400.						

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.

Wisconsin Campaig	n Finance Information System	
Step 1: Enter Transactions	Reminders	E MENU & REMINDERS D LOCOUT ! HELP
New Contribution or Receipt	::Message from Wisconsin Ethics Commission::	
New Expense or Obligation New Commercial Loan	Settlement Offer Schedule for Campaign Finance Vio	
Return a Contribution	Upcoming Filing Period Due Dates	
New Payment of Outstanding Loan	Spring Pre-Primary 2018	02/12/2018
New Payment of Outstanding Obligation Enter Conduit Transmittal Code	Spring Pre-Election 2018	03/26/2018
Upload Transactions from Spreadsheet	Spring re-Liettion 2010	63/26/2010
Step 2: File Your Report	July Continuing 2018	07/15/2018
File Report/Edit Pending Transactions	Default Filing Period	
Make a Change to a Filed Report	None SET DEFAULT FILING PERIOD	
Amend a Filed Report		

- 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.

Wisconsin Campaign Finance Information System	
File Report/Edit Pending Transactions	🔒 kitanan ka kadada (kataran) 🛛 💽 🕐
2	
Filing Period Name Uuly Continuing 2017	Filing Year
Transaction Type Transaction Category	Contributor/Payee Name
Transaction Date Range	
To Amount Range	
	🔲 Non-Compliant 🔲 Not Yet Filed 72 Hr. Report
	EAR

- 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.

To group by column, drag and drop column here											
Transaction Date	Amount City State Zip Compliance Hr Edit										
No records to display.											

- 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

File Report/Edit Pendin	ig Transactions	â	kennen forsasilder i	••• • ?		
	Comments:					
	Attachment: Choose File No	file chosen				
	6 AUTHORIZATION					
	Committee ID*					
	s Password*					
	Committee PIN*					
	Individual submitting this document:					
	I am the individual listed above an examined this report and to the be complete.	d by clicking the submit button, I st of my knowledge and belief it is	certify that I have true, correct and			
		CANCEL CLEAR				

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.

US/01/2017 Wisconsin W										
hange page: 1 Displaying page 1 of 1, items 1 to 1 of 1	05/01/2017 CON Monetary \$300.00 Wisconsin W									
Change page: 1 Displaying page 1 of 1, items 1 to 1 of 1										

- 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.

File Report/Edit Pending Transactions	4	i Dhuman ka Camili kini (Di Di D							
7	SUBMIT CANCEL CLEAR								
Cash Balances: Verify the reported cash balances are correct – make corrections here if needed.									
Filing Period Name *	Start Date *	Beginning Balance*							
July Continuing 2017 👻									

- 8. Press **View/Print** to open a PDF preview of your finance report. Confirm that the amounts listed on the cover page are accurate.
- 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.

:: Preview Finance Report ::							
Print the foll	wing Report						
CF 2	8 VIEW / PRINT						
9 FILE ALL TO STATE BACK							

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.

File Report/Edit Pending Transactions		2	North Rev Carolin		B ?			
Comments:				<i>i</i>				
Attachment:	Choose File No file c	hosen						
AUTHORIZATION 10								
Committee ID*								
's 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.								
LAST REPORT FILED								
Filing Period Name : Special Pre-Primary 2017 T	Date : 1	2/04/2017 E	nding Balance :	1	50.00			
Cash Balances: Verify the reported cash balances are correct ïč½ make corrections here if needed.								
Filing Period Name * Start Date *	B	eginning Balance	e* Ending	Balance *				
January Continuing 2018 💌								

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.

	STATE	I FINANCE REPORT OF WISCONSIN CF-2	2	
COMMITTEE IDENTIF				
Filing Period Name:	July Continuing 2017 Covers all activity from	01010017 8vough 06/000017	OFFICE USE ONLY	
Name of Committee/Corporation:			CLOTHOLD CLODY	
Street Address:	Station - Bar		CASH SUMMARY	
City, State and Zip:	And and a second second		·	
SUMPARY OF RECEIPTS AN	AD DISBURSEMENTS	Criant A This Period	Cash Balance Beginning of Report*	+ \$0.00
L RECEIPTS				
1A. Contributions (Including	Loans) from Individuals	\$1,510.00	Total Receipts	+ \$1,550.00
18. Contributions from Com	mittees (Transfer-In)	\$0.00		
1C. Other Income and Com	mential Louis	90.00	Subtotal	\$1,550.00
TOTAL RECEIPTS (I	al totals from 1A, 10 and 10	9 \$1,550.00		
2. DISBURSHMENTS			Total Disbursements	- \$1,450.00
2A. Gross Excenditions		\$1,450.00	i otal Disbuisements	- \$1,450.00
28. Collebutions to Comm		90.00		
		8) \$1,450.00	CASH BALANCE END OF REPORT*	= \$100.00
CASH SUMMARY				
Cash Balance Beginning of	Peport*	50.00		
Total Receipts		\$1,550.00		
Subtral		\$1,550.00		
Total Disbursements		\$1,450.00		
INCLUED ON IGATIONS	IFORT-	1-01.00		
distance at the Close of The	in Protont-Table	50.00		
LOANS (Balance at the C		\$500.00		
"Cesh Balance as reported by		100.00		
		knowledge and bellef it is true, correct a	and compilate.	
Type or Pitch Name of Candidate of	(internal)	e of Candidate or Treasurer Date: Daylor Errat	name and a second s	
the information may subject you to	the penalties of sa. 11,1400, 11	Contraction, 11 (2010), 11 (2010), 11 (2010), 11 (2010), 11 (1401), 110s. Blatts. Nice-Commission, P.O. Box 7984, Madeon, 11		

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**.

AUTHORIZATION	1
Committee ID*	
's Password*	
Committee PIN*	
Individual submitting this document:	
I am the individual listed above and by clicki to the best of my knowledge and belief it is t	ing the submit button, I certify that I have examined this report and true, correct, and complete.
8 SUBMI	T CANCEL CLEAR

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 lefthand menu.

Wisconsin Campaign F	n System	
Step 1: Enter Transactions	Reminders	🔓 tal ar the consection transform (procession) 🤭
New Contribution or Receipt	::Message from Wisco	nsin Ethics Commission::
New Expense or Obligation New Commercial Loan	Settlement Offer Sch	iedule for Campaign Finance Vio
Return a Contribution	Upcoming Filing Peri	Due Dates
New Payment of Outstanding Loan	Spring Pre-Primary 201	8 02/12/2018
New Payment of Outstanding Obligation	Spring Pre-Election 201	8 03/26/2018
Enter Conduit Transmittal Code Upload Transactions from Spreadsheet	Spring Pre-Election 201	8 03/20/2018
	July Continuing 2018	07/15/2018
File Report/Edit Pending Transactions	Default Filing Period	
Make a Change to a Filed Report	None	SET DEFAULT FILING PERIOD
Amend a Filed Report		
A destruit destruition		

- 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.

	🔞 Wisconsin Campaign Finar	ace Information System		NDERS 🗗 LOGOUT I HELP					
	Amend Reports/Amend Transactions		Citizen berGestehlen						
2	2								
	Filing Period Name July Continuing 2017		Filing Year	•					
	Transaction Type	Transaction Category	Contributor/Payee Name						
	Transaction Date Range	THAT		AMB.					
		Amount Range	🗆 Non-compliant	E M					
>		3 SEARCH CLEAR CANCEL							
Expand									
-									
	NEW RECEIPT NEW EXPENSE NEW INCURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMMERCIAL LOAN NEW RETURN RECEIPT FILE NO ACTIVITY								

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.

To group by column, drag and drop column here Transaction Date Contributor/Pavee Name TransactionType Transaction Category Amount Compliance Edit Select										
Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Eait	Selec			
04/11/2017	Brayer, Core	CON	In-Kind	\$750.00	8					
04/11/2017	10000 - 1000	EXP	In-Kind	\$750.00	8	1				
4/03/2017	may how my	EXP	In-Kind	\$700.00	٠	1				
5/01/2017	Contribution, Some	CON	Personal Loan	\$500.00	V	1				
hange page: 1	Displaying page 1 of 1, items 1 to 4	of 4					7			
NEW RECEIPT NEW EXPENSE NEW INCURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMME VIAL LOAN										
NEW RETURN RECEIPT PREVIEW FINANCE REPORT FILE ALL TO STATE DELETE										

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

To group by colum	To group by column, drag and drop column here											
Transaction Date	Contributor/Payee Name	TransactionType	Transaction Category	Amount	Compliance	Edit	Select					
04/11/2017	temper, das	CON	In-Kind	\$750.00	8	1						
04/11/2017	ingen, ine	EXP	In-Kind	\$750.00	8	1						
04/03/2017	tary manage	EXP	In-Kind	\$700.00	*	1						
05/01/2017	Enclosed for	CON	Personal Loan	\$500.00	8	1						
Change page: 1	Displaying page 1 of 1, items 1 to 4	of 4										
6												
NEW	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	https://www.	CON	In-Kind	\$750.00	8	1					
04/11/2017	league, line	EXP	In-Kind	\$750.00	8	1					
04/03/2017	hary transmity	EXP	In-Kind	\$700.00	8	1					
05/01/2017	Conductors, Inc.	CON	Personal Loan	\$500.00	8	1					
Change page: 1	Displaying page 1 of 1, items 1 to 4	of 4									
NEW RECEIPT NEW EXPENSE NE NEURRED OBLIGATION PAID NEW LOAN PAYMENT NEW COMMERCIAL LOAN NEW RETURN RECEIPT PREVIEW FINANCE REPORT FILE ALL TO STATE DELETE											

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.

Amend Reports/Amend Transactions		2				?
Comments:					/i	
Attachment:	Choose File	No file chos				
AUTHORIZATION			9			
Committee ID*						
s Password*]			
Committee PIN*						
Individual submitting this document:]			
o I am the individual listed above and by clicking the submi true, correct and complete.	t button, I certify tha		amined this report and to th	ne best of my	knowledge and belief i	t is
Cash Balances: Verify the reported cash balances are	correct ïč½ make	correction	s here if needed.			
Filing Period Name *	Start Date *		Beginning Balance*	Endir	ig Balance *	
Special Pre-Primary 2017 (Assm: 58, 66; Sen: 10)	7/1/2017		100.00	150.0	00	
July Continuing 2017	1/1/2017		0.00	100.0	00	

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. <u>Wis. Stat. §</u> <u>11.0105(1)</u>.
- Your committee must not have any pending transactions in CFIS.
- You must not be a candidate as defined by <u>WIS. STAT. § 11.0101(1)</u>, 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

 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.



- 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**.

Т	To group by column, drag and drop column here													
	ransaction ate	Contributor/Payee Name	Transaction Type	Transaction Category	Amount	Address Line1	Address Line2	City	State	Zip	Compliance	72 Hr. Reports	Edit	
c	5/02/2017	Control Salidar	CON	Monetary	0.048.00	i Analasa kan			Terment		8		/	
C	hange page:	1 Displaying pag	ge 1 of 1, item	is 1 to 1 of 1										
	XLS DOC CSV													
	NEW RECEIPT NEW EXPENSE PREVIEW FINANCE REPORT DELETE ALL FILE 72Hr. REPORT FILE 72Hr ALL FILE NO ACTIVITY													
	3 REQUEST FOR TERMINATION FILE ALL TO STATE FILE SELECTED TO STATE DELETE													

- 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**.
- 5. To complete your registration, you must print and sign your completed CF-9 form. Click **View/Print** to access the PDF of your committee registration.
- 6. Have all parties named under Certification section sign the registration. Return your completed CF-9 registration form to the Ethics Commission using one of the methods below:

E-mail CampaignFinance@wi.gov	Fax (608) 264-9319
Mail	Hand Delivery
Wisconsin Ethics Commission	101 E Wilson St.
PO Box 7125	Suite 127
Madison, WI 53707-7125	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.

(3) Wisconsin Campaign			I HELP					
Step 1: Enter Transactions	•	Reminders		2	en such	an series	i irreat	• ?
Enter Contributions Upload Contributions from Spreadsheet		::Message from Wisconsin	Ethics Commissio	<u>)n::</u>				
Step 2: File Your Report	•	Settlement Offer Schedu	le for Campaign Fina	ance Vio				
File Report/Edit Pending Transactions Make a Change to a Filed Report		Spring Pre-Primary 2018			02	/12/2018		
Amend Reports/Amend Transactions		Spring Pre-Election 2018			03	/26/2018		
Administrative View/Edit Registration Information		July Continuing 2018			07	/15/2018		
View Filed Reports Reprint Transmittal Letters Maintain Users Change Password		Default Filing Period	T	SET DEFAL	ILT FILING	PERIOD		

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.

🔞 Wisconsin Campaign Finance	e Information System
	E MENU & REMINDERS C LOGOUT ! HELP
Step 1: Enter Transactions	Upload Transactions
Enter Contributions	Download Templates
Upload Contributions from Spreadsheet	Excel 2003 and Conduits
Step 2: File Your Report	Excel 2007 and Conduits
File Report/Edit Pending Transactions	Upload File
Make a Change to a Filed Report	Filing Period Spring Pre-Primary 2018 Select a Choose File No file chosen
Amend Reports/Amend Transactions	Name File
Administrative	UPLOAD CLEAR CHECK STATUS
View/Edit Registration Information	Please Note: Completing an upload on this screen does not file your report. After you have uploaded your transactions, advance to the File Report/Edit Pending Transactions screen to make any changes to
View Filed Reports	your transactions and file your report.
Reprint Transmittal Letters	Upload Status
Maintain Users	Currently processing jobs: 35074
Change Password	
	Additional Information 3
	Download Committee IDs
	Download Recall Office Ids Download Recount Ids
	Download Referendum Ids Download Local Candidate Ids
	Download Unregistered Ids

4. Enter contributions your committee has received in the **Conduit Contributions** spreadsheet. The spreadsheet template has an Upload Help 24 ConduitContribution I4 4 F FI sheet to guide you through the purpose of Ready 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**.

5 pload File					
Name	July Continuing 2017	•		Select a File	Choose File No file chosen
	6	UPLOAD	CLEAR C	HECK STATUS	

- 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.

Uplo	Upload File							
Filing	Period Na	me July Co	ntinuing 2017	•		ect a File Chor	se File No file chosen	
	UPLOAD CLEAR CHECK STATUS							
	File	upload successful	. Your file is in que	ue. Please check the status	of your file after a few	v minutes by clickin	g on the "Check Status" button.	
		eleting an uploaded ete the transactions.		lelete the uploaded transaction	s. To delete uploaded t	ransactions please na	vigate to Edit/File Pending Transactions	
Uplo	ad Status	i i						
Curre	Currently processing jobs:							
2	Job # Uploaded Date File Name Number of Rows Status							
r.	- Job#: 41458							
	<u>41458</u>	06/20/2017	July Continu	uing 2017 Conduit 6202017111449	<u>M xlsx</u>	4	Uploaded	

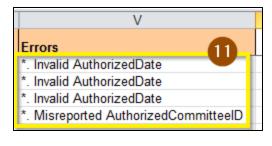
9. Once processed, the status of your upload will show **Processed-No Errors** for transactions that uploaded successfully or **Processed-Errors** for transactions the system was unable to process.

	Job #	Uploaded Date	File Name	Number of Rows	Status
~	Job#:4	41458			
		06/20/2017	July Continuing 2017 Conduit 6202017111449AM.xlsx	3	Processed-No Errors
		06/20/2017	July Continuing 2017 Conduit 6202017111449AM.xlsx	1	Processed-Errors

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.

	Job #	Uploaded Date	File Name	Number of Rows	Status	
~	Job#: 4	41458				
		06/20/2017	July Continuing 2017 Conduit 6202017111449AM.xlsx	3	Processed-No Errors	
		06/20/2017	July Continuing 2017 Conduit 6202017111449AM.xlsx	1	Processed-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	Redirected is listed as the Transaction Type and a Committee ID for a state, federal, or
cannot be done to State,	local candidate has been entered. Redirected funds may not be contributed to state,
Federal, or Local Candidates	federal, or local candidates.
Zip Should be Numeric	Zip must be a five or nine-digit number. If the zip begins with a zero, enter it with a
- or -	leading apostrophe to ensure the upload preserves the full five digits. Ex: '02860. Do not
Zip Should be in Length (5/9)	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.

(Wisconsin Campaign Final	nce Information System	
Step 1: Enter Transactions	Reminders	🕹 terana kanadapertanakanya jeranaka 🥐
Enter Contributions Upload Contributions from Spreadsheet	::Message from Wisconsin Ethics Commission::	
Step 2: File Your Report	Upcoming Filing Period Due Dates	
Make a Change to a Filed Report	Spring Pre-Primary 2018	02/12/2018
Amend Reports/Amend Transactions	Spring Pre-Election 2018	03/26/2018
Administrative View/Edit Registration Information View Filed Reports	July Continuing 2018	07/15/2018
Reprint Transmittal Letters Maintain Users Change Password	Default Filing Period None SET DEFAU	LT FILING PERIOD

- 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.

File Report/Ed	it Pending Transactions		2	the international statistical in	an (Balancia)	•?
2						
Filing Period Name	July Continuing 2017	Receiving Registrant	•	Filing Year		-
Transaction Type	•	Transaction Category	•	Contributor/Payee Name		
Transaction Date Ra	nge					
To		Amount Range				
		-		🔲 Non-Compliant 🔲 Tran	ismittal Letter Not Ge	nerated
				Segregated Fund		
				View All Transactions		
	No	te: Please select Receiving Registrant to	generate Transn	nittal Letter!		
		3 SEARCH CANCEL	CLEAR			

- 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.
- 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.

To group by c	olumn, drag and dro	op column her	e												
Transaction Date	Contributor/Payee Name	Transaction Type	Transaction Category	Receiving Committee	Amount	Address Line1	Address Line2	City	State	Zip	Segregated Fund Flag	Compliance	Transmittal Letter	Edit	
05/01/2017	1000 (1000 (1000 C	CON	Conduit Contribution	anto, en An	\$15.00				Wisconsin		False			/	
05/01/2017	ander) meer	CON	Conduit Contribution	utitatio en	\$400.00	12		Hardson.	Wisconsin		False	v		-	
Change page:	1 Displaying pag	je 1 of 1, item	ns 1 to 2 of 2							1				-	
													×		CSV
	PREVIEW FINANCE REPORT DELETE ALL FILE NO ACTIVITY														
	REQUEST FO	R TERMINAT		ATE TRANSM	1ITTAL LE	TTER F	ILE ALL T	O STATE	PRINT A	LL TRAN	SMITTAL LET	rter de	LETE		

- 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.

AUTHORIZATION	6				
Committee ID*					
's Password*					
Committee PIN*					
Individual submitting this document:					
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.					
	to the best of my knowledge and belief it is true, correct, and complete.				

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.

Wisconsin Campaign Finar			
Step 1: Enter Transactions	Reminders		🕹 tatang kangalipertanakangan jatangai 🥐
Enter Contributions	::Message from Wis	consin Ethics Commission::	
Upload Contributions from Spreadsheet	Cathlement Office	Debudula for Consoling Singers Mid	
Step 2: File Your Report		Schedule for Campaign Finance Vio	
File Report/Edit Pending Transactions	Upcoming Filing Pe	eriod Due Dates	
Make a Change to a Filed Report	Spring Pre-Primary 2	018	02/12/2018
Amend Reports/Amend Transactions	Spring Pre-Election 2	:018	03/26/2018
Administrative			
View/Edit Registration Information	July Continuing 2018		07/15/2018

- 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.

File Report/Edit Pending Transactions	2	ara inakalerakilakan (Kikita) 💽 ?
2		
Filing Period Name July Continuing 2017	Receiving Registrant	Filing Year
Transaction Type	Transaction Category	Contributor/Payee Name
Transaction Date Range		
To	Amount Range	🔲 Non-Compliant 🔲 Transmittal Letter Not Generated
		Segregated Fund
		View All Transactions
Not	e: Place select Receiving Registrant to generate Tra	nsmittal Letter!

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**.

	5 PREVIEW FINANCE REPORT	DELETE ALL	NO ACTIVITY	
REQUEST FOR TERMINATION	GENERATE TRANSMITTAL LETTER	FILE ALL TO STATE	PRINT ALL TRANSMITTAL LETTER	DELETE

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

File Report/Edit Pending Transactions	🕹 Marana kasilaan sabilaha (Milani) 🕑 🥐
	7 SUBMIT CANCEL CLEAR
COVERS ALL ACTIVITY FROM	
Start Date *	

- 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**.

File Report/Edit Pending Transactions	2	Observative Standards Cardolle	
Comments:			
Attachment:	Choose File No file chosen	n	
Committee ID*			
s Password*			
Committee PIN*			
Individual submitting this document:			
o I am the individual listed above and by clicking the submit buttor correct and complete.	n, I certify that I have examine	d this report and to the best of my	knowledge and belief it is true,
o I also certify that the conduit has held the redirected contribution statements is true: 12/5 The conduit has attempted to contact the contributor at la attempts, but has been unable to make contact with the contribut 12/5 The individual contributor is deceased and the UNE SUM	east 5 times over a time period or. spouse or executor of the estate	of more than 30 consecutive days,	and has documented those
LAST REPORT FILED			
Filing Period Name : July Continuing 2017		d Date : 06/30/201	7
COVERS ALL ACTIVITY FROM			

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.

Wisconsin Camp	paign Finance Information System	
Forgot Password		?
	2 Committee ID/Username: * Committee ID/Username: * Committee or Candidate Email:* 3 SUBMIT CANCEL If you've forgotten your Committee ID, please use the Registrant Search to look it up.	

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.

Wisconsin Campaign Finance Information System		ystem
Step 1: Enter Transactions	Reminders	🗧 attatta ranaa ta taabaa, juutu uj. 🥐
Step 2: File Your Report	::Message from Wisconsi	n Ethics Commission::
Make a Change to a Filed Report	Settlement Offer Schedu	ule for Campaign Finance Vio
Administrative	Upcoming Filing Period	Due Dates
View/Edit Registration Information View Filed Reports	Spring Pre-Primary 2018	02/12/2018
Maintain Users Change Password	Spring Pre-Election 2018	03/26/2018
	July Continuing 2018	07/15/2018

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.

Wisconsin Campaign Finance Information System		
Step 1: Enter Transactions	Reminders	🕹 alballa riinaa la baalaks joolu taj
Step 2: File Your Report	::Message from Wisconsin Ethics Commission::	
Make a Change to a Filed Report	Settlement Offer Schedule for Campaign Finance Vio	
Administrative	Upcoming Filing Period Due Dates	
View/Edit Registration Information	Spring Pre-Primary 2018	02/12/2018

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

Committee Information	n				
Committee Name*	at All a financial for the state			Acronym (if anv)	
Choose a 4-digit PIN. This PIN will be used to electronically sign reports and registration amendments.		PIN*	The second secon		
Email*	And the set of the set	Phone*	(mag-and-data)	Phone 2	()

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.

Status	
Are you Exempt from Filing Campaign Finance Reports? 🛛 🔘 Yes 🖲 No	
If you do not anticipate receiving or spending more than \$2,000 in a calendar year, you may select "Exempt" status. Exempt committees are not required to file campaign finance reports. If your committee receives or spends more than \$2,000 in a calendar year, it must amend its status to non-exempt, and file campaign finance reports covering the entire calendar year.	
Verify that your information is up-to-date and accurate:	

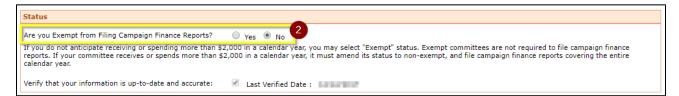
How do I file for exemption so I don't have to submit reports?

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. <u>WIS. STAT. § 11.0104</u>. 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.

Wisconsin Campaign Finance Information System			
Step 1: Enter Transactions	~	Reminders	🕹 albella ribas la tadada (table) 🧿
Step 2: File Your Report	~	::Message from Wisconsin Ethics Commission::	
Make a Change to a Filed Report	~	Settlement Offer Schedule for Campaign Finance Vio	
Administrative	^	Upcoming Filing Period Due Dates	
View/Edit Registration Information		Spring Pre-Primary 2018	02/12/2018

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: <u>https://ethics.wi.gov/Pages/CampaignFinance/CampaignFinance.aspx</u>

Contact the Ethics Commission

Reach the Ethics Commission staff by email at <u>CampaignFinance@wi.gov</u> 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 <u>https://ethics.wi.gov</u>.