

# CAMPAIGN FINANCE

FEBRUARY 2007

[www.phila.gov](http://www.phila.gov)

# 3 Steps

- Complete the Affidavit
- Determine the Mode of Submission
- Register if Required

# Getting Started

- Affidavit
- Modes of Submission
  - C D
  - Mass Import
  - Spreadsheet
  - Data Entry

# Getting Started cont'd

## ■ Registration Form

– Required for

- On-line Data Entry

- On-Line Mass Import

– Not required for

- CD

- Spreadsheet

# AFFIDAVIT

- Affidavit – “Campaign Finance Filing Form”
  - Submit signed hard copy
  - Available on-line at [www.phila.gov/records](http://www.phila.gov/records)
    - Select “Campaign Finance”
- Print the form
  - Complete
  - Sign
  - Submit
- Deliver to
  - Records Department
  - Room 156 City Hall
  - Philadelphia PA 19107
  - ATTN: Campaign Finance

City of Philadelphia  
 Department of Records  
**Campaign Finance Filing Form**

Print Form 

Clear Form 

**IMPORTANT: Please enter Committee and/or Candidate names exactly as they appear on submitted Campaign Finance Report or Statement.**

Name Of Committee

Name of Candidate (If any)  Office Sought by Candidate

State Filer ID No. (if applicable)  Date of Filing with Records/Board

|                |  |                             |                                       |                             |                        |                             |  |                             |
|----------------|--|-----------------------------|---------------------------------------|-----------------------------|------------------------|-----------------------------|--|-----------------------------|
| Type of Report | 6 <sup>th</sup> Tuesday Pre-Primary >> | 1. <input type="checkbox"/> | 2 <sup>nd</sup> Friday Pre-Primary >> | 2. <input type="checkbox"/> | 30 Day Post-Primary >> | 3. <input type="checkbox"/> | 6 <sup>th</sup> Tuesday Pre-Election >>                              | 4. <input type="checkbox"/> |
|                | 2 <sup>nd</sup> Friday Pre-Election >> | 5. <input type="checkbox"/> | 30 Day Post-Election >>               | 6. <input type="checkbox"/> | Annual Report >>       | 7. <input type="checkbox"/> | Campaign Finance Statement - \$250.00 or less for reporting period > | 8. <input type="checkbox"/> |

Amended Report (Yes/No)  Termination Report (Yes/No)

"I swear (or affirm) that the information contained in the electronic filing submitted together with this statement is true, correct and complete to the best of my knowledge and belief"

Signature of Committee Treasurer, if filed by Treasurer \_\_\_\_\_ Signature of Candidate, if filed by Candidate \_\_\_\_\_

Print Name \_\_\_\_\_ Print Name \_\_\_\_\_

**Filing of this electronic disclosure DOES NOT satisfy Pennsylvania Code requirements for filing with the City Commissioners or the Secretary of the Commonwealth.**

City of Philadelphia • Department of Records  
 156 City Hall • Broad & Market Streets • Philadelphia, PA 19107 • 215-686-2262

# Registration Form

- Available for printing
- [www.phila.gov/records](http://www.phila.gov/records)
  - Select “Campaign Finance”
- How to submit
  - Mail to Records Dept.
  - Fax to 215-686-2273
  - E-mail [records.info@phila.gov](mailto:records.info@phila.gov)
    - List the required information in the e-mail

## CAMPAIGN FINANCE ON-LINE REGISTRATION

### THE FOLLOWING IS REQUIRED TO OBTAIN AN ON-LINE ACCESS ACCOUNT

There are three options for requesting on-line registration:

1. You can hand-deliver this form to Room 156 City Hall or send it via regular mail:  
Records Department, Room 156 City Hall, Philadelphia, PA 19107 ATTN.: CAMPAIGN FINANCE
2. You can fax this form to 215-686-2273
3. You can send the information listed on the form to [records.info@phila.gov](mailto:records.info@phila.gov)

Please Print

|  |  |
|--|--|
| FULL NAME OF ON-LINE SUBMITTER (USER)  |  |
| PHONE NUMBER OF USER   |  |
| EMAIL ADDRESS OF USER  |  |
| NAME OF CAMPAIGN OR ORGANIZATION   |  |
| FULL MAILING ADDRESS<br>OF CAMPAIGN OR ORGANIZATION  |  |
| PHONE NUMBER<br>OF CAMPAIGN OR ORGANIZATION  |  |
| NAME OF AFFIDAVIT SIGNER<br>(THIS IS USUALLY THE TREASURER)  |  |
| FULL MAILING ADDRESS<br>OF THE AFFIDAVIT SIGNER  |  |
| PHONE NUMBER OF AFFIDAVIT SIGNER   |  |
| FILER IDENTIFICATION NUMBER<br>7 DIGIT NUMBER ASSIGNED BY THE DEPARTMENT OF STATE<br>REQUIRED FOR ON-LINE MASS IMPORT FUNCTION   |  |
| ONCE INFORMATION IS RECEIVED AND ACCOUNT IS CREATED, THE USER WILL RECEIVE AN EMAIL<br>CONTAINING THEIR USER ID, PASSWORD, AND SUGGESTIONS FOR THE USE OF THE APPLICATION. |  |

82-37

# Determine How To Submit

- CD
- On-Line Mass Import
- Spreadsheet
- On-Line Data Entry

# I USE A SOFTWARE PACKAGE CERTIFIED BY THE STATE

- You can submit the required text files
  - CD
  - or
  - **ON-LINE MASS IMPORT**
- Is a **REGISTRATION FORM** required?
  - CD – NO
  - ON-LINE MASS IMPORT - YES

# I DO NOT USE A SOFTWARE PACKAGE CERTIFIED BY THE STATE

- Two Options
  - Spreadsheet
  - On-Line Data Entry

# Spreadsheets / Data Entry Requirements

- Spreadsheet
  - Requires a PC with Excel Software
- On-Line Data Entry
  - Requires a PC with Internet Browser
  - Registration Is required

# Should I Use the Spreadsheet?

- Use the Spreadsheet
- You have more than 50 entries on a schedule
- You have Excel software
- You do not have an Internet connection
- You have a slow Internet connection
- You must work off-line
- You prefer to work off-line

# Should I Use On-Line Data Entry?

- Use On-Line
- You have Internet connection
- You submit a Campaign Finance Statement
- You submit a Campaign Finance Report
  - With limited number of entries
  - 50 or less entries

# I DON'T HAVE . . . . .

- I don't have a PC, Internet Browser, or Excel
- What can I do?
  - Records Dept. has equipment and staff
  - Please schedule an appointment
  - E-mail your request to [records.info@phila.gov](mailto:records.info@phila.gov)

# I HAVE SOFTWARE BUT NEED HELP . . . . .

- We will assist you
  - Please schedule an appointment
  - Please e-mail your request to [records.info@phila.gov](mailto:records.info@phila.gov)

# Let's Review CD

1. Submit the CD and Affidavit to
  1. Records Dept., Room 156 City Hall
  2. Philadelphia PA 19107
  3. ATTN: Campaign Finance
2. On-Line Registration
  1. Not required

# Let's Review

## On-Line Mass Import

1. Submit the Affidavit to
  1. Records Dept., Room 156 City Hall
  2. Philadelphia PA 19107 ATTN: Campaign Finance
2. Complete and sent the Registration to the Records Dept.
3. You will receive
  1. A password and ID
  2. Address of on-line system
  3. Instructions for using the Mass Import
4. Submit using the Mass Import utility

# Let's Review Spreadsheet

1. Submit the Affidavit to
  1. Records Dept., Room 156 City Hall
  2. Philadelphia PA 19107 ATTN: Campaign Finance
2. Go to [www.phila.gov/records](http://www.phila.gov/records)
  1. Campaign Finance to download the spreadsheet template
  2. Instructions for completing the template

# Let's Review

## Spreadsheet Cont'd

4. Or, the Records Dept will provide you with a diskette or CD with the template
5. Deliver the CD or Diskette with the completed spreadsheet to the Records Dept., Room 156 City Hall ATTN: Campaign Finance

OR

5. E-mail the Spreadsheet to:  
[Records.info@phila.gov](mailto:Records.info@phila.gov)

# Let's Review On-Line Data Entry

1. Submit the Affidavit to
  1. Records Dept., Room 156 City Hall
  2. Philadelphia PA 19107 ATTN: Campaign Finance
2. Send the Registration to the Records Dept.
3. You will receive
  1. A password and ID
  2. Address of on-line system to use
  3. Instructions for using the system
4. Log-in and use the system

# Where Can I Find Information?

- [www.phila.gov](http://www.phila.gov)
  - Ethics Board
  - Records Department
- Information on-line
  - Forms
  - Contacts
  - How to submit
  - Technical Specifications

# Wrap-Up

■ Thank You!