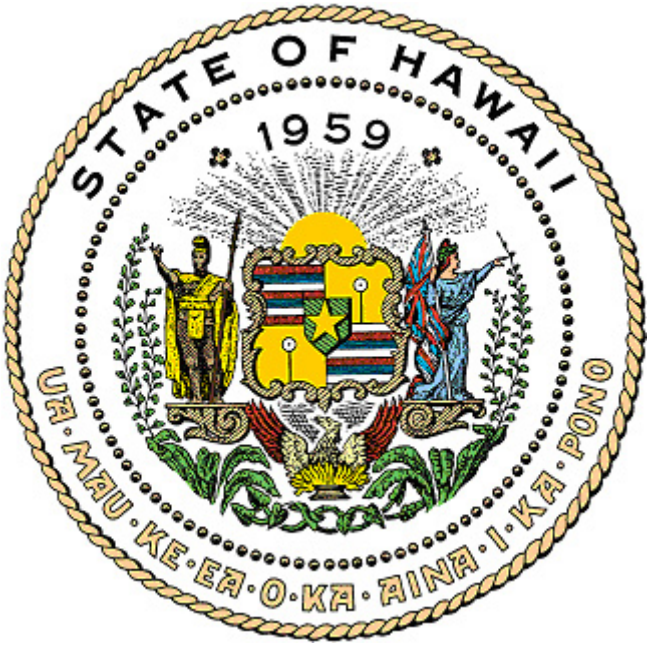
CAMPAIGN SPENDING COMMISSION

Candidate Filing System



Guidebook for Hawaii County Council Comprehensive Public Funding Candidates (March, 2010)

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1. Introduction

Aloha and welcome to Hawaii Campaign Spending Commission's Candidate Filing System (CFS). This Guide will assist Hawaii County Council candidates to understand the comprehensive public funding features in the CFS.

The CFS CC Administrator-User Guide (Revised March, 2010) is a separate Guide that is available on the Commission website at www.hawaii.gov/campaign. That Guide provides a more detailed overview of the CFS, including information on obtaining a username and password to login to the CFS, registering the committee in the CFS, and filing periodic campaign disclosure reports.

2. Overview of the Comprehensive Public Funding Features

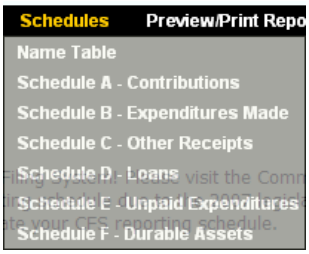
Navigate within the CFS by using the tabs on the Menu at the top of the Home Page.

The following tabs will access the comprehensive public funding features in the CFS:

- <u>Administration</u>

  - Enter the filing date for the "Declaration of Intent to Seek Comprehensive Public Funding" form on the "Hawaii County Council Public Funding" screen.

- Schedules



  - Enter Seed Money and Qualifying Contributions on the "Schedule A - Contributions" screen.
  - Enter Comprehensive Public Fund Expenditures on the "Schedule B - Expenditures Made" screen.

- Preview/Print Report

  - Preview and print the Seed Money Report on the "Seed Money Report" screen.
  - Preview and print the Qualifying Contributions Report and the Post-Election Expenditures Report on the "Special Report" screen.

- File Report

  - File the Seed Money Report on the "Seed Money Report" screen.
  - File the Qualifying Contributions Report and the Post-Election Expenditures Report on the "Special Report" screen.

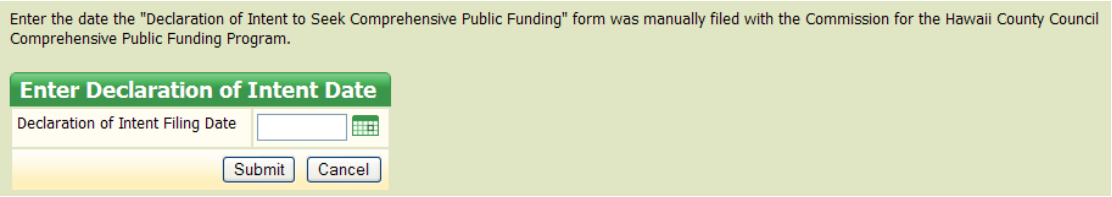
- Filing Confirmations

  - Filing confirmations for the Seed Money Report can be viewed on the "Hawaii CC - Seed Money Reports" screen.
  - Filing confirmations for the Qualifying Contributions Report can be viewed on the "Hawaii CC - Qualifying Contributions Report" screen.
  - Filing confirmations for the Post-Election Expenditures Report can be viewed on the "Hawaii CC - Post-Election Expenditures Report" screen.

3. Entering the Declaration of Intent Filing Date

After you manually file your "Declaration of Intent to Seek Comprehensive Public Funding" form (Form CPF-1) with the Commission or the Hawaii County Clerk's office, you must login to the CFS and enter the filing date by clicking the "Administration" tab and then "Hawaii County Council Public Funding."

The following screen will appear:



Enter the date the Declaration of Intent form was manually filed with the Commission or the Hawaii County Clerk's office.

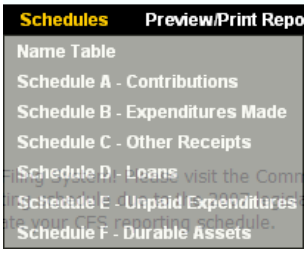
Click Submit to enter the date.

Click Cancel to return to the Home Page.

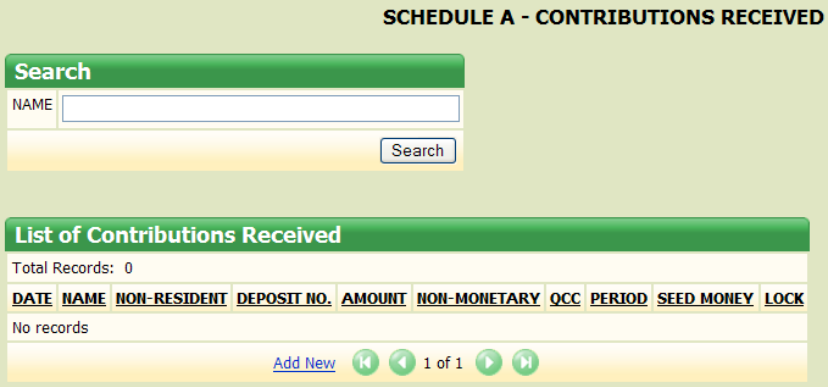
Note: You will not be able to enter data with the proper public funding checkboxes on Schedules A and B until you enter the date that the Declaration of Intent form was manually filed.

4. Entering Seed Money and Qualifying Contributions (Schedule A)

Enter seed money and qualifying contributions by clicking the "Schedules" tab and then "Schedule A - Contributions."



The following screen will appear:

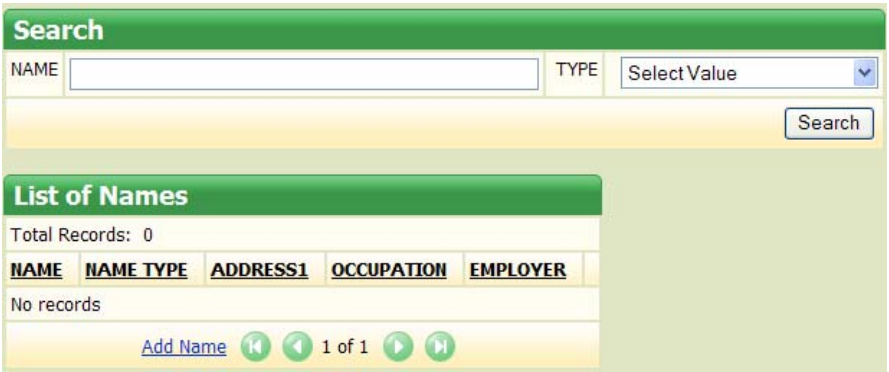


1. Begin entering a new seed money or qualifying contribution by clicking Add New.

2. After clicking Add New, the screen below will appear.

   a. In the Search field, type in ALL CAPS the name of the contributor. If the contributor is an individual, type the contributor's last name. If the contributor is not an individual, type the contributor's name.

   b. Click Search. If the name was previously entered in the CFS, proceed to Step 4b below. If the contributor's name was not entered in the CFS, the message "No records" will appear as follows:



3. Click Add Name and a screen will appear as follows:

Add/Edit Name

Name Type	Select Value
First Name	
Middle Initial	
Last / Business Name	
Suffix	Select Value
Address 1	
Address 2	
City	
State	HI
Zip Code	
Occupation	
Employer	

Add | Cancel | Add Contribution

4. Enter the contributor's name and other information in the screen.

   a. If you click Add, the screen below will appear. Click Add Contribution to take you to the screen in Step 5. You will expedite date entry by clicking Add Contribution.

Search

NAME | TYPE | Select Value

Search

List of Names

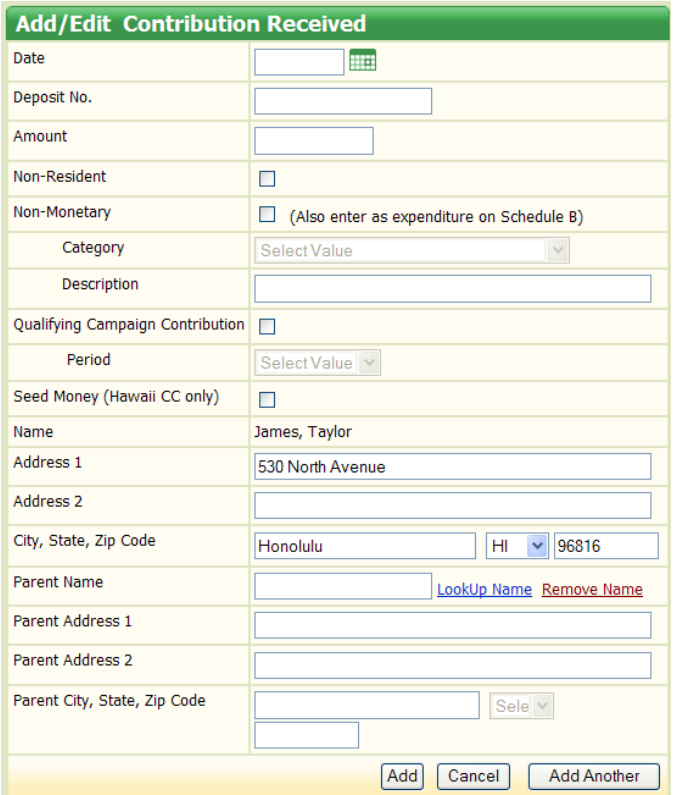
Total Records: 1

NAME	NAME TYPE	ADDRESS1	OCCUPATION	EMPLOYER	
James, Taylor	Individual	530 North Avenue	General Manager	NEWS Radio	Add Contributions

Add Name | 1 of 1

   b. Click Add Contributions to take you to the screen in Step 5.

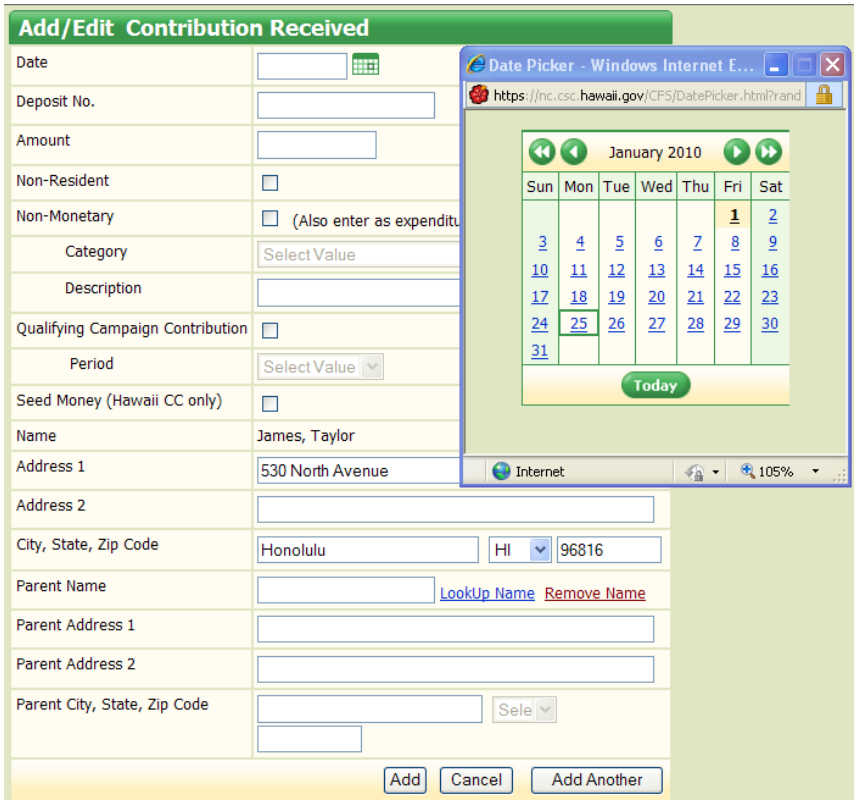
5. The contributor's Name, Address 1, Address 2, City, State and Zip Code will be pre-filled in the screen.



6. Add a new contribution from this contributor by entering data as follows:

   a. Date (Required field)

      Enter the deposit date of the contribution in the mm/dd/yyyy format or click the calendar icon to the right of the Date field and select the date from the pop-up window:



Your Internet browser must allow pop-up windows to use the calendar. Double arrow left takes you back one year, single arrow left takes you back one month, single arrow right takes you forward one month and double arrow right takes you forward one year. The default date will be the date on your computer's calendar.

Note No. 1: A seed money contribution must be received <u>on or before</u> the date that the Declaration of Intent form was manually filed.

Note No. 2: A qualifying contribution must be received <u>on or after</u> January 1 of the election year and the date that the Declaration of Intent form was manually filed.

b. Deposit No. (Optional field)

Enter the deposit number from the bank to assist in reconciling your accounts.

c. Amount (Required field)

Enter the contribution amount. For a $250.00 seed money contribution, enter 250. For a $5.00 qualifying contribution, enter 5. Seed money contributions must be an aggregate amount not greater than $250 each. Qualifying contributions must be $5.

d. Non-Resident (Optional field)

Check this box if the seed money contribution was not received from a resident of the State.

Qualifying contributions must be from registered voters who reside within the county district to which the candidate seeks nomination or election at the time of the contribution.

e. Non-Monetary (Optional field)

Check this box if the seed money contribution is non-monetary.

Qualifying contributions must be monetary contributions.

You also must manually enter an off-setting expenditure on Schedule B for each non-monetary contribution entered on Schedule A.

f. Category (Conditionally required field)

A category can be selected only if the Non-Monetary box is checked. Click the down arrow and select the applicable category.

g. Description (Conditionally required field)

A description can be entered only if the Non-Monetary box is checked.

h. Qualifying Campaign Contribution (Optional field)

Check this box for qualifying contributions.

i. Period (Conditionally required field)

Select "Hawaii CC" from the drop-down if the Qualifying Campaign Contribution checkbox is checked.

j. Seed Money (Optional field)

Check this box for seed money contributions.

k. Parent Name, Parent Address 1, Parent Address 2, Parent City, State and Zip Code (Optional fields)

If a seed money contribution is received from a minor, click Lookup Name next to Parent Name and a pop-up window will appear. Select the name of the minor's parent or guardian by clicking Name. This will insert the parent or guardian's name and address, and close the pop-up.

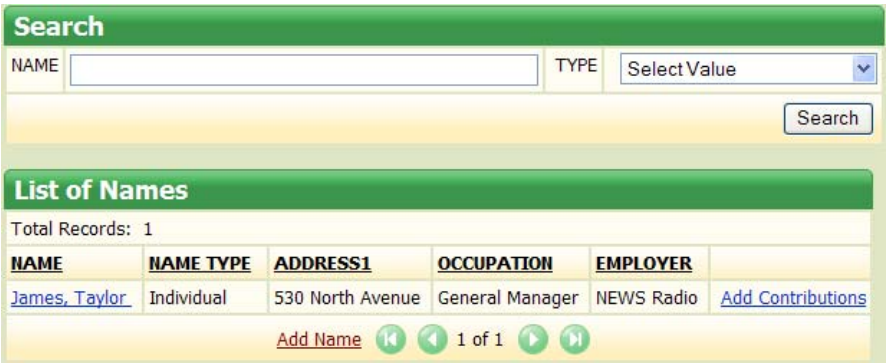
If the parent or guardian's name does not appear in the pop-up window, you must add the name in the Name Table before entering the minor's seed money contribution. Click "Schedules" to get to the Name Table.

Note: The seed money contribution will be reported in the name of the minor but aggregated with the parent or guardian's seed money contributions. Qualifying contributions must be from registered voters so they cannot be received from minors.

7. After entering all the data:

   a. Click Add to add the new seed money or qualifying contribution. Clicking Add will take you to the Schedule A screen. You must click Add New, as provided in Step 1, to enter another contribution.

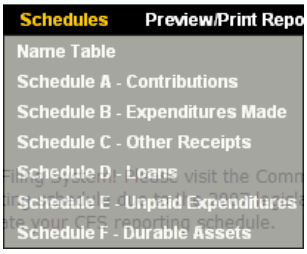
   b. Alternatively, click Add Another (in the screen in Step 6) to begin entering the next contribution. That will take you directly to the Names list in the screen below. Note: Only Schedules A and B have the Add Another button, which expedites data entry.



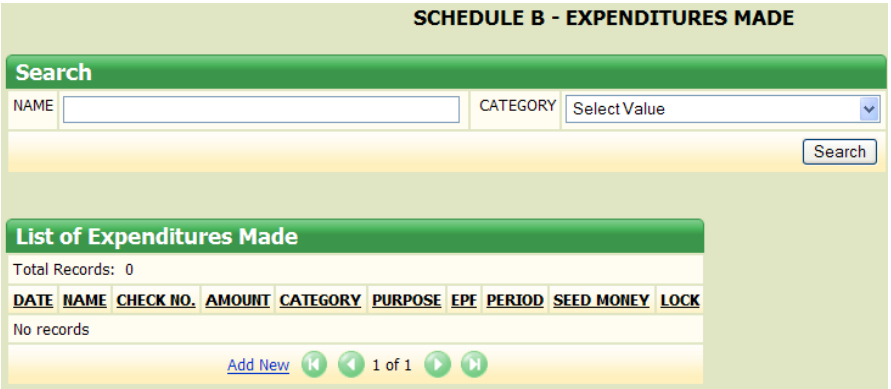
8. Click Cancel to return to the Schedule A screen.

5. Entering Seed Money and Comprehensive Public Funding Expenditures (Schedule B)

Enter seed money and comprehensive public fund expenditures by clicking the "Schedules" tab and then "Schedule B - Expenditures Made."



The following screen will appear:

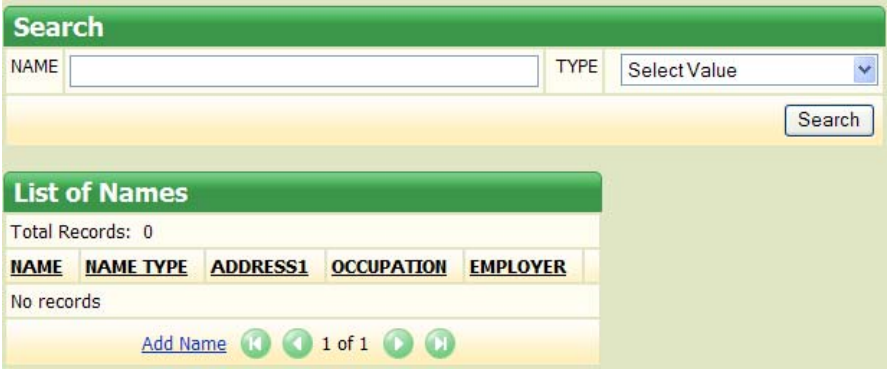


1. Begin entering a new seed money or comprehensive public funding expenditure by clicking Add New.

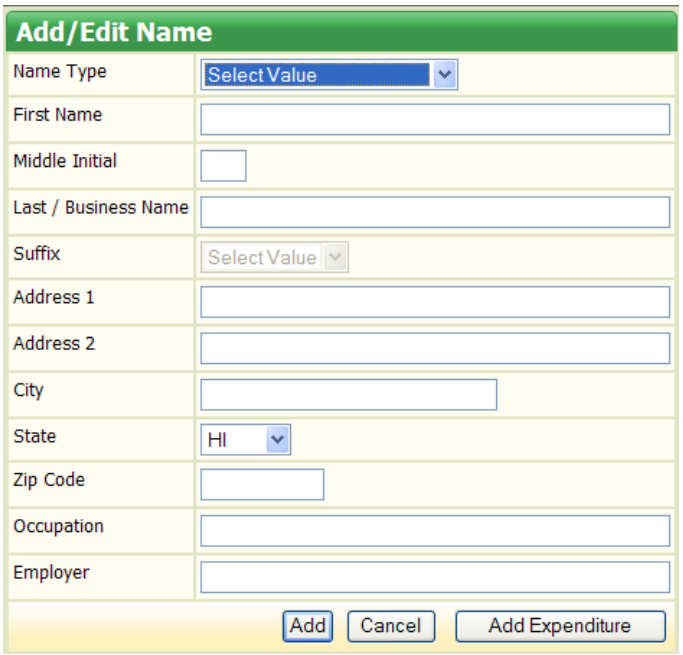
2. After clicking Add New, the screen below will appear.

   a. In the Search field, type in ALL CAPS the name of the payee. If the payee is an individual, type the individual's last name. If the payee is not an individual, type the payee's name.

   b. Click Search. If the name was previously entered in the CFS, proceed to Step 4b below. If the payee's name was not entered in the CFS, the message "No records" will appear as follows:

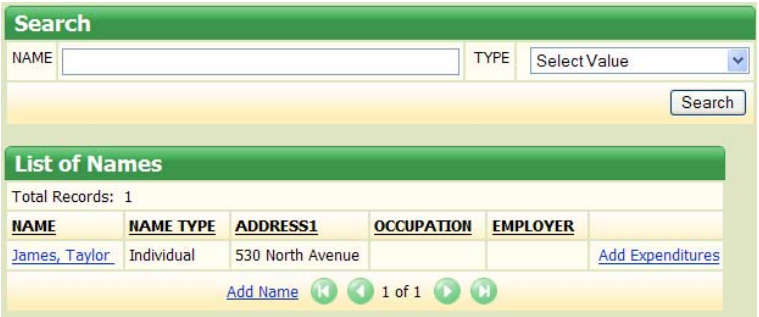


3. Click Add Name and a screen will appear as follows:



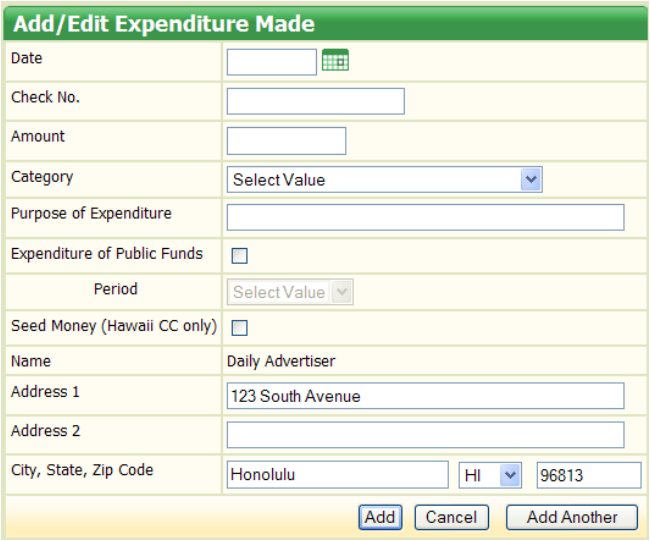
4. Enter the payee's name and other information in the screen.

   a. If you click Add, the screen below will appear. Click Add Expenditures to take you to the screen in Step 5. You will expedite date entry by clicking Add Expenditures.



   b. Click Add Expenditures to take you to the screen in Step 5.

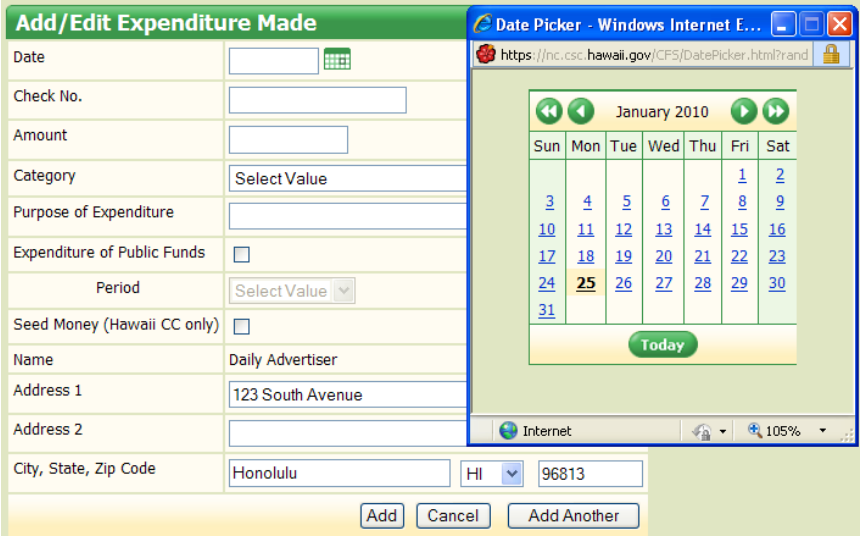
5. The payee's Name, Address 1, Address 2, City, State and Zip Code will be pre-filled in the screen.



6. Add a new expenditure to that payee by entering data as follows:

   a. Date (Required field)

      Enter the date of the expenditure in the mm/dd/yyyy format or click the calendar icon to the right of the Date field and select the date from the following pop-up window:



Your Internet browser must allow pop-up windows to use the calendar. Double arrow left takes you back one year, single arrow left takes you back one month, single arrow right takes you forward one month and double arrow right takes you forward one year. The default date will be the date on your computer's calendar.

b. Check No. (Optional field)

Enter the check number to assist in reconciling your accounts.

c. Amount (Required field)

Enter the expenditure amount. For a $500.00 expenditure, enter 500. For a $500.50 expenditure, enter 500.50.

d. Category (Required field)

Click the down arrow and select from the list the applicable category. Remember, only certain types of expenditures are authorized. Check the Hawaii Administrative Rules for the Hawaii County Council Comprehensive Public Funding posted on the Commission website.

e. Purpose of Expenditure (Required field)

Enter the purpose of the expenditure.

f. Expenditure of Public Funds (Required field)

Check this box for comprehensive public funding expenditures.

g. Period (Conditionally required field)

Select "Primary" if the comprehensive public funding expenditure was made in the primary election campaign period (January 1-September 18, 2010) or select "General" if the comprehensive public funding expenditure was made in the general election campaign period (September 19-November 2, 2010).

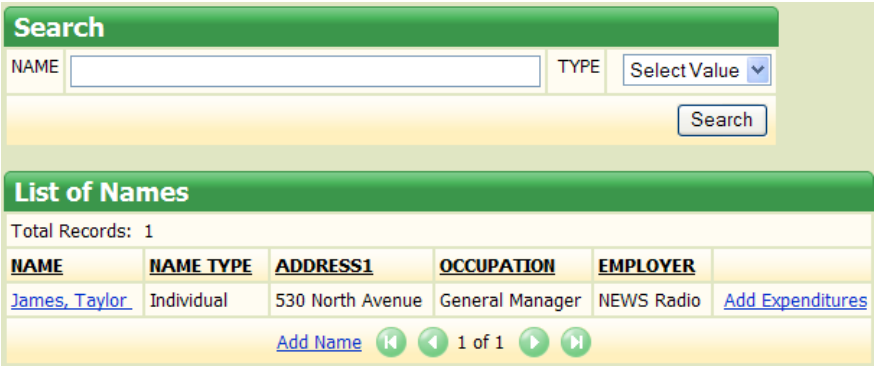
h. Seed Money (Hawaii CC Only)

Check this box for seed money expenditures.

7. After entering all the data:

a. Click Add to add the new seed money or comprehensive public funding expenditure. Clicking Add will take you to the Schedule B screen. You must click Add New, as provided in Step 1, to enter another expenditure.

b. Alternatively, click Add Another (in the screen in Step 6) to begin entering the next expenditure; that will take you directly to the Names list in the screen below. Note: Only Schedules A and B have the Add Another button which expedites data entry.



8. Click Cancel to return to the Schedule B screen.

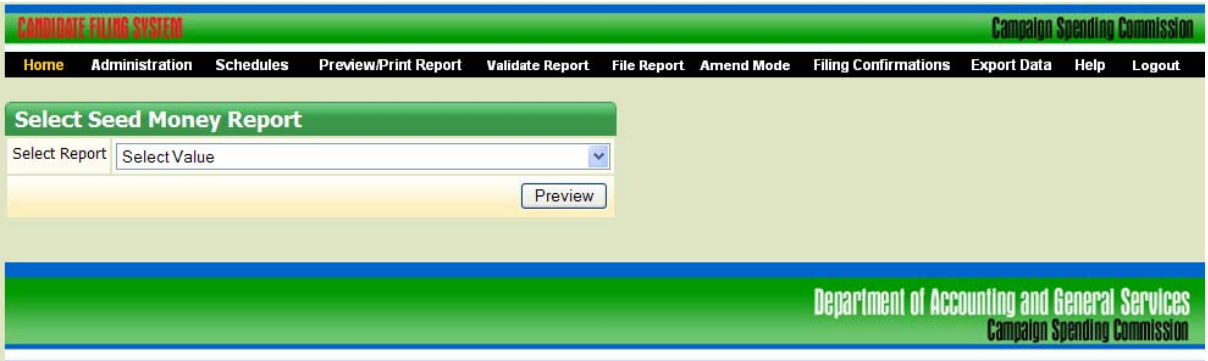
6. Previewing and Printing Reports

Seed Money Reports, Qualifying Contribution Reports, and Post-Election Expenditure Reports can be previewed and printed by clicking the "Preview/Print Report" tab.

Seed Money Report

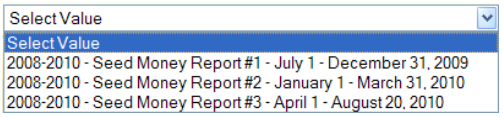
1. Click on "Seed Money Report" to preview and print a Seed Money Report.

The following screen will appear:

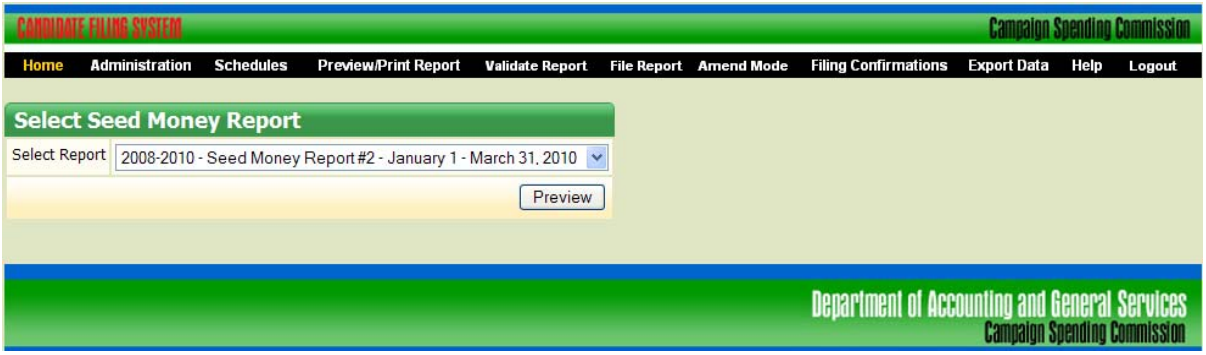


2. Select Report (Required field)

Click the down arrow and three seed money reporting periods will appear on the drop-down menu as follows:



3. Select the applicable reporting period and click Preview to preview and print the report.



4. The following is an example of a Seed Money Report:

STATE OF HAWAII - CAMPAIGN SPENDING COMMISSION

Committee: Admin Account
Report: 2008-2010 - Seed Money Report #2 - January 1 - March 31, 2010

Seed Money Summary	
Prior Seed Money Activity	
Seed Money Contributions Received	$0.00
Less Seed Money Expenditures Made	$0.00
Total	$0.00
Current Seed Money Activity	
Seed Money Contributions Received	$250.00
Less Seed Money Expenditures Made	$200.00
Total	$50.00
Summary of All Seed Money Activity	
Seed Money Contributions Received	$250.00
Less Seed Money Expenditures Made	$200.00
Seed Money Balance	$50.00

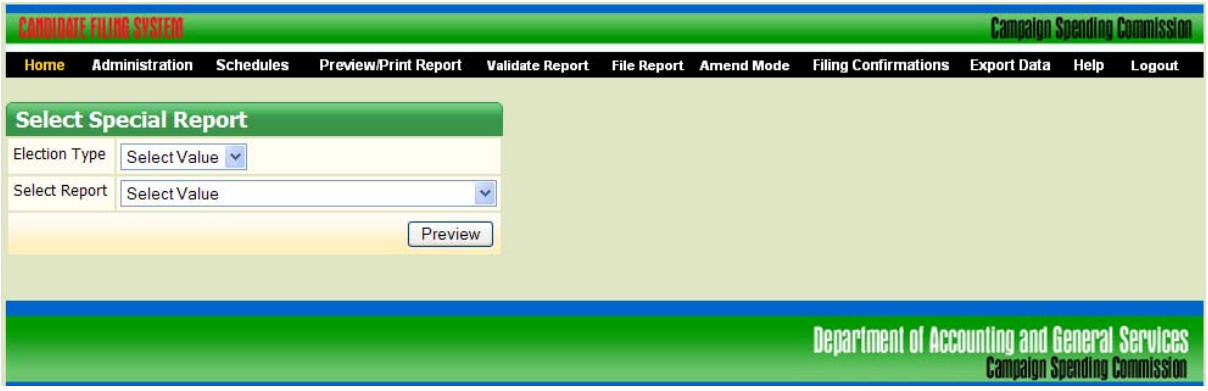
Schedule A - Seed Money Contributions Received (More Than $100)				
Name and Address	**Employer**	**Date**		**Amount**
	Occupation	**Non-Monetary Category**	**Seed Money**	**Aggregate**
	Non-Monetary Description			
James, Taylor		01/04/2010		$250.00
530 North Avenue			☑	$250.00
Honolulu HI 96816				
Total				$250.00

Schedule B - Seed Money Expenditures Made				
Name and Address	**Date**	**Category**	**Seed Money**	**Amount**
	Purpose of Expenditure or Non-Monetary Description			
Daily Advertiser	01/05/2010	Advertising	☑	$200.00
123 South Avenue Honolulu HI 96813	Ad			
Total				$200.00

Qualifying Contributions Report

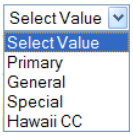
1. Click on "Special Report" to preview and print the Qualifying Contributions Report.

The following screen will appear:



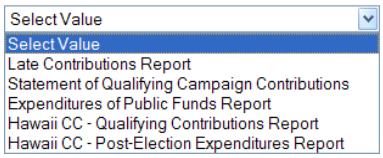
2. Election Type (Required field)

Click the down arrow and select "Hawaii CC" from the drop-down menu:

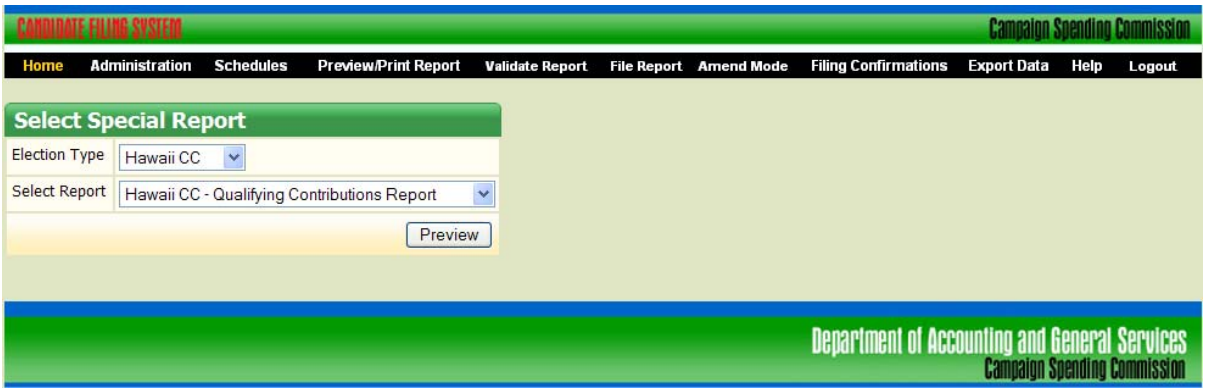


3. Select Report (Required field)

Click the down arrow and select "Hawaii CC - Qualifying Contributions Report" from the drop-down menu:



4. Click Preview to preview and print the report.



5. The following is an example of a Qualifying Contributions Report:

STATE OF HAWAII - CAMPAIGN SPENDING COMMISSION
Committee: Admin Account
Office: Hawaii CC

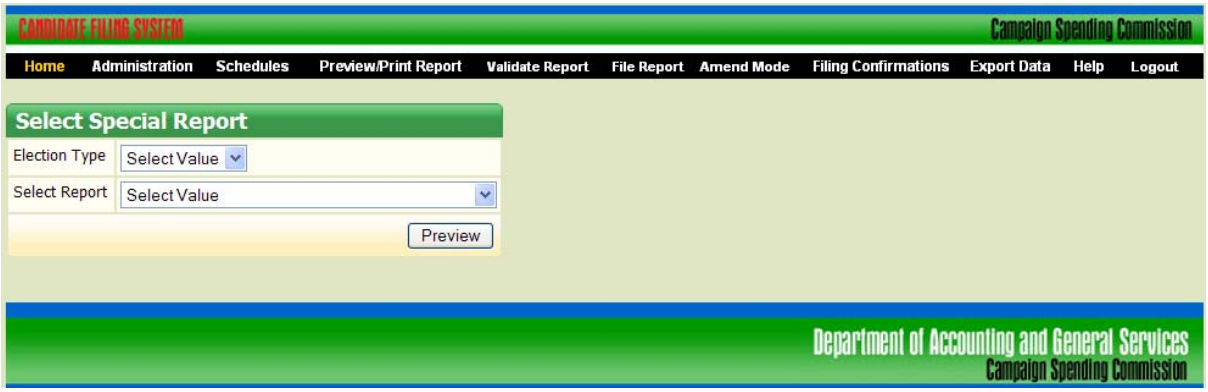
Hawaii CC - Qualifying Contributions Report

Date	Name and Address	Amount	Aggregate
01/04/2010	**James, Taylor** 530 North Avenue Honolulu HI 96816	$5.00	$5.00
Total Qualifying Contributions			$5.00

Post-Election Expenditures Report

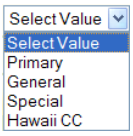
1. Click on "Special Report" to preview and print the Post-Election Expenditures Report.

The following screen will appear:



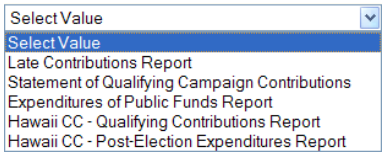
2. Election Type (Required field)

Click the down arrow and select "Primary" or "General" from the drop-down menu:

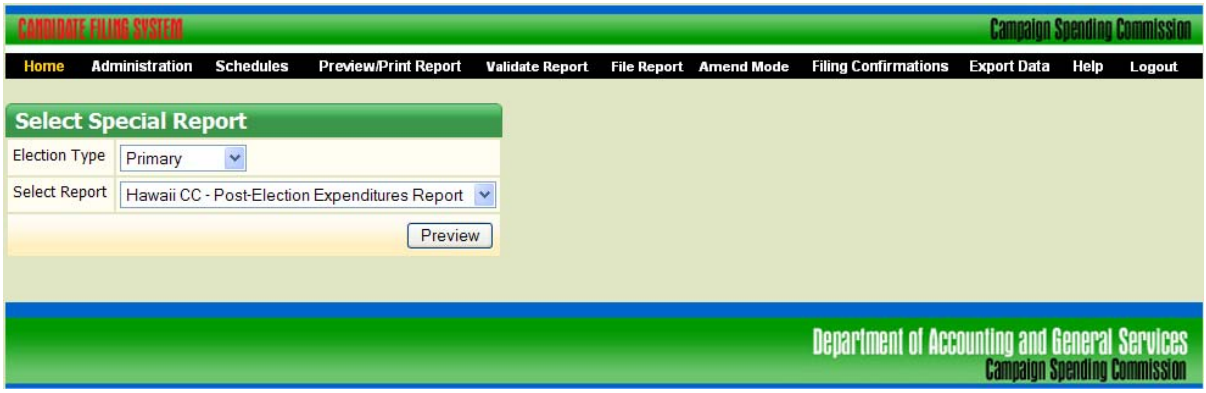


3. Select Report (Required field)

Click the down arrow and select "Hawaii CC - Post-Election Expenditures Report" from the drop-down menu:



4. Click Preview to preview and print the report.



5. The following is an example of a Post-Election Expenditures Report for the Primary Election:

STATE OF HAWAII - CAMPAIGN SPENDING COMMISSION
Hawaii CC - Post-Election Expenditures Report

1. Candidate and Candidate Committee:	
(a) Candidate Name:	Test Site For Campaign Spending Commission
(b) Committee Name:	Admin Account
(c) Address:	- - - HI 00000
(d) Phone:	-
2. Election:	Primary

Name and Address	**Date**	**Category**	**Amount**
	Purpose of Expenditure		
Daily Advertiser 123 South Avenue Honolulu HI 96813	01/05/2010	Advertising	$200.00
	Ad		
Total Expenditures This Election			$200.00

7. Filing Reports

Seed Money Reports, Qualifying Contribution Reports, and Post-Election Expenditure Reports can be filed by clicking the "File Report" tab.

Before filing a report, the Commission recommends that the report be previewed and printed (See Chapter 6, Previewing and Printing Reports).

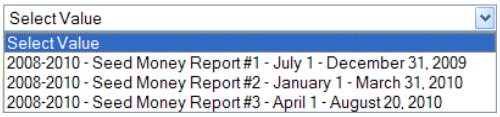
Seed Money Report

1. Click on "Seed Money Report" to file a Seed Money Report.

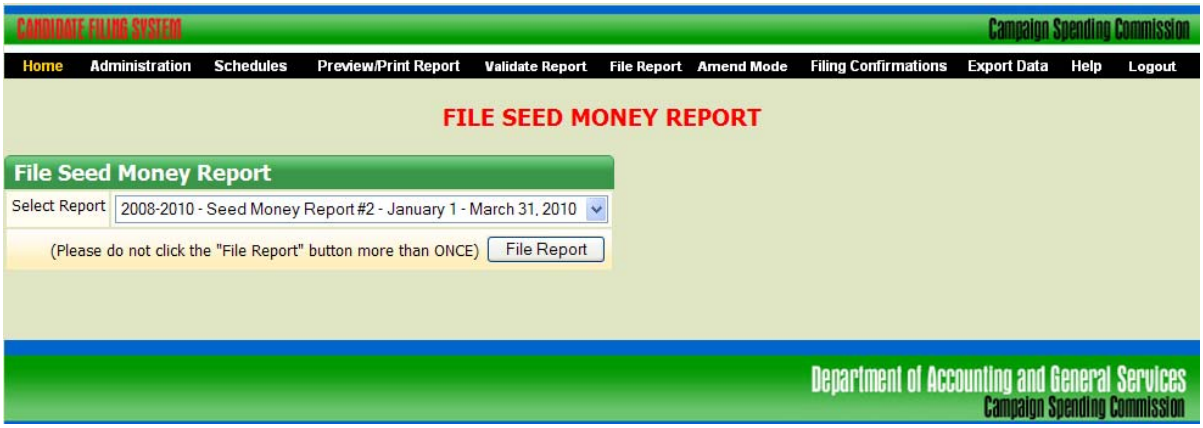
The following screen will appear:

2. Select Report (Required field)

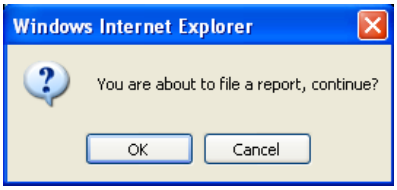
Click the down arrow and three seed money reporting periods will appear on the drop-down menu as follows:



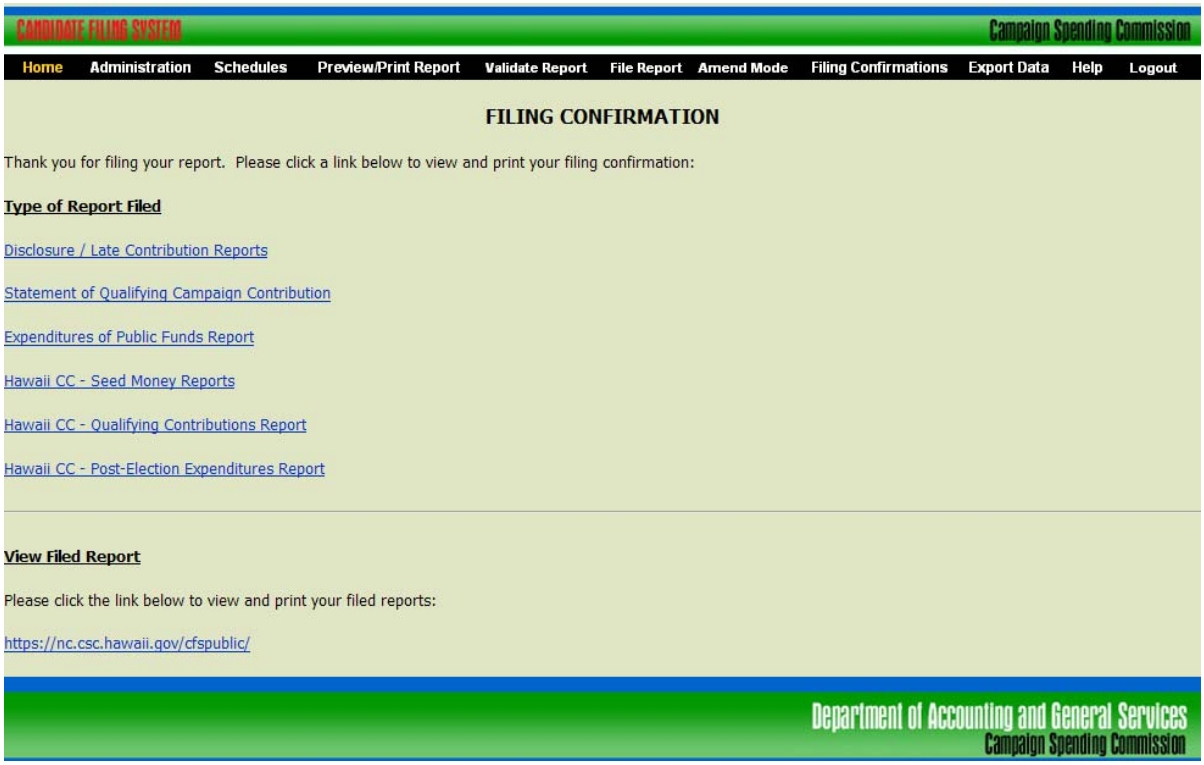
3. Select the applicable reporting period and click File Report only once to file the report.



4. Click Cancel if you do not want to file the Seed Money Report; or click OK to file the report. It may take a few moments to file the report. Please be patient. DO NOT RE-CLICK FILE REPORT OR CLOSE THE INTERNET BROWSER BEFORE YOU GET THE FILING CONFIRMATION.



5. The filing of the Seed Money Report is confirmed when a screen appears as follows:

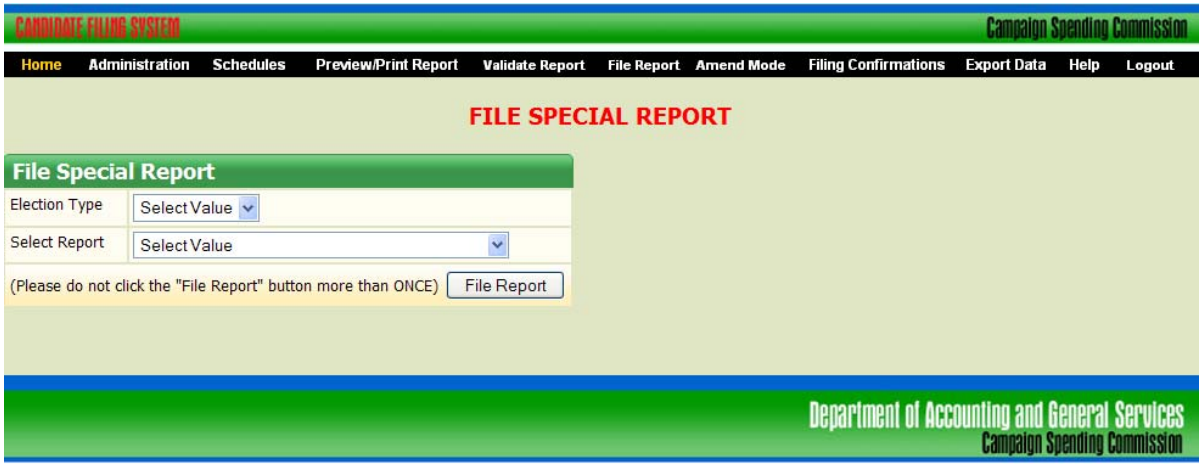


6. Click Hawaii CC - Seed Money Reports to confirm that the report was filed.

Qualifying Contributions Report

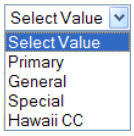
1. Click on "Special Report" to file the Qualifying Contributions Report.

The following screen will appear:



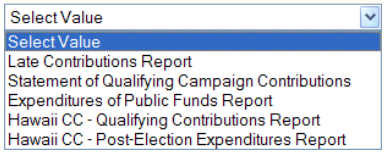
2. Election Type (Required field)

Click the down arrow and select "Hawaii CC" from the drop-down menu:

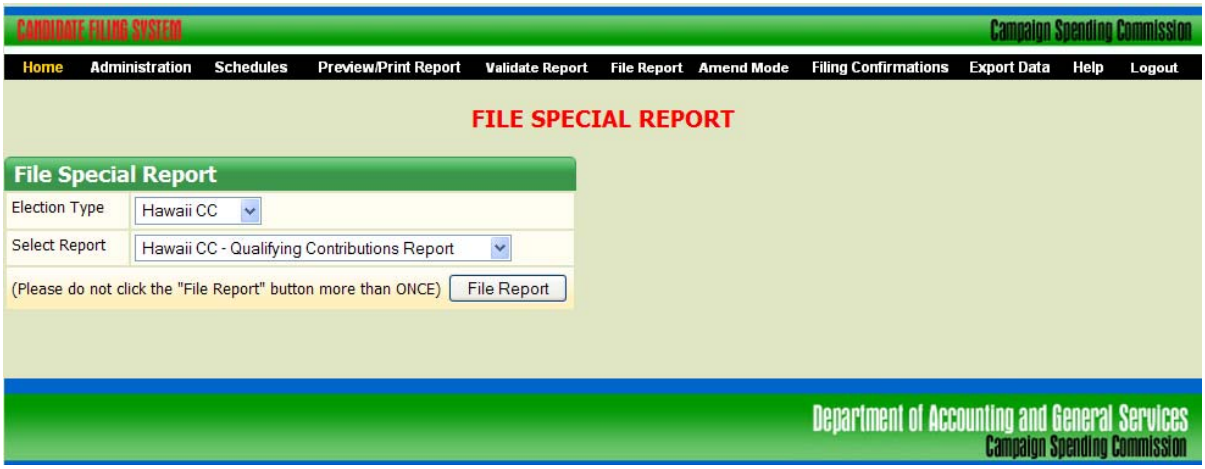


3. Select Report (Required field)

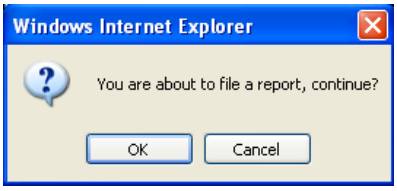
Click the down arrow and select "Hawaii CC - Qualifying Contributions Report" from the drop-down menu:



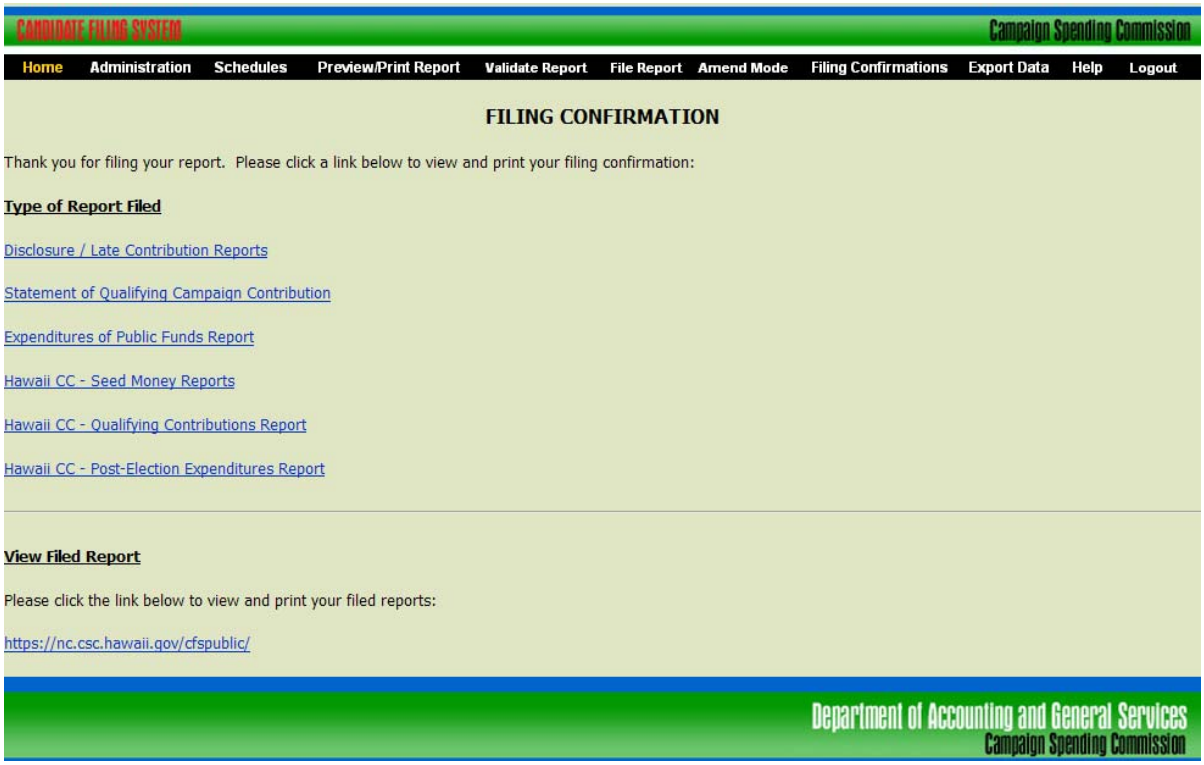
4. Click File Report only once to file the report.



5. Click Cancel if you do not want to file the Qualifying Contributions Report; or click OK to file the report. It may take a few moments to file the report. Please be patient. DO NOT RE-CLICK FILE REPORT OR CLOSE THE INTERNET BROWSER BEFORE YOU GET THE FILING CONFIRMATION.



6. The filing of the Qualifying Contributions Report is confirmed when a screen appears as follows:

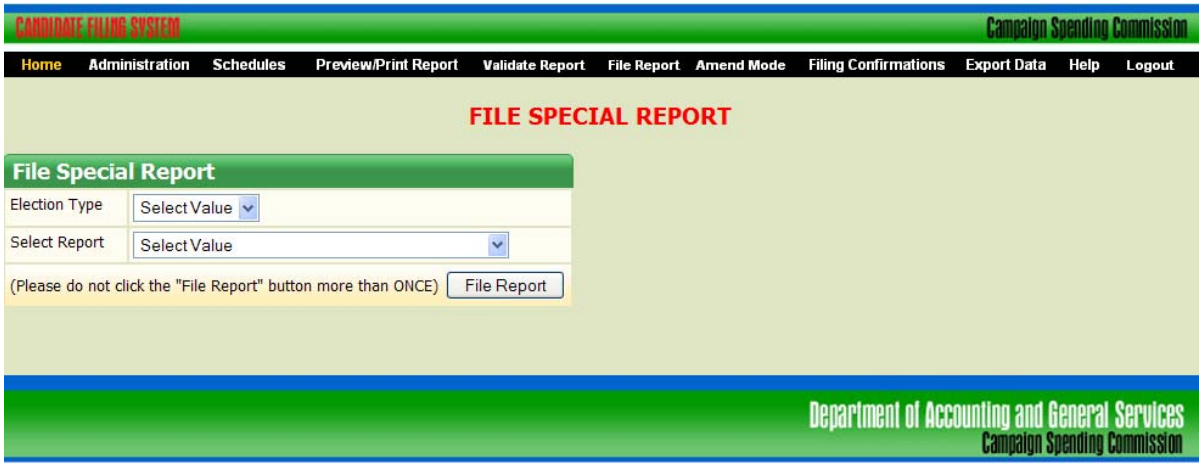


7. Click Hawaii CC - Qualifying Contributions Report to confirm that the report was filed.

Post-Election Expenditures Report

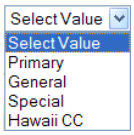
1. Click on "Special Report" to file the Post-Election Expenditures Report.

The following screen will appear:



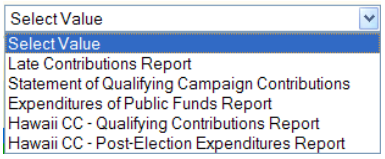
2. Election Type (Required field)

Click the down arrow and select "Primary" or "General" from the drop-down menu:



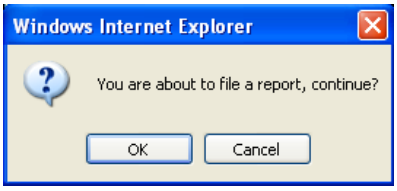
3. Select Report (Required field)

Click the down arrow and select "Hawaii CC - Post-Election Expenditures Report" from the drop-down menu:

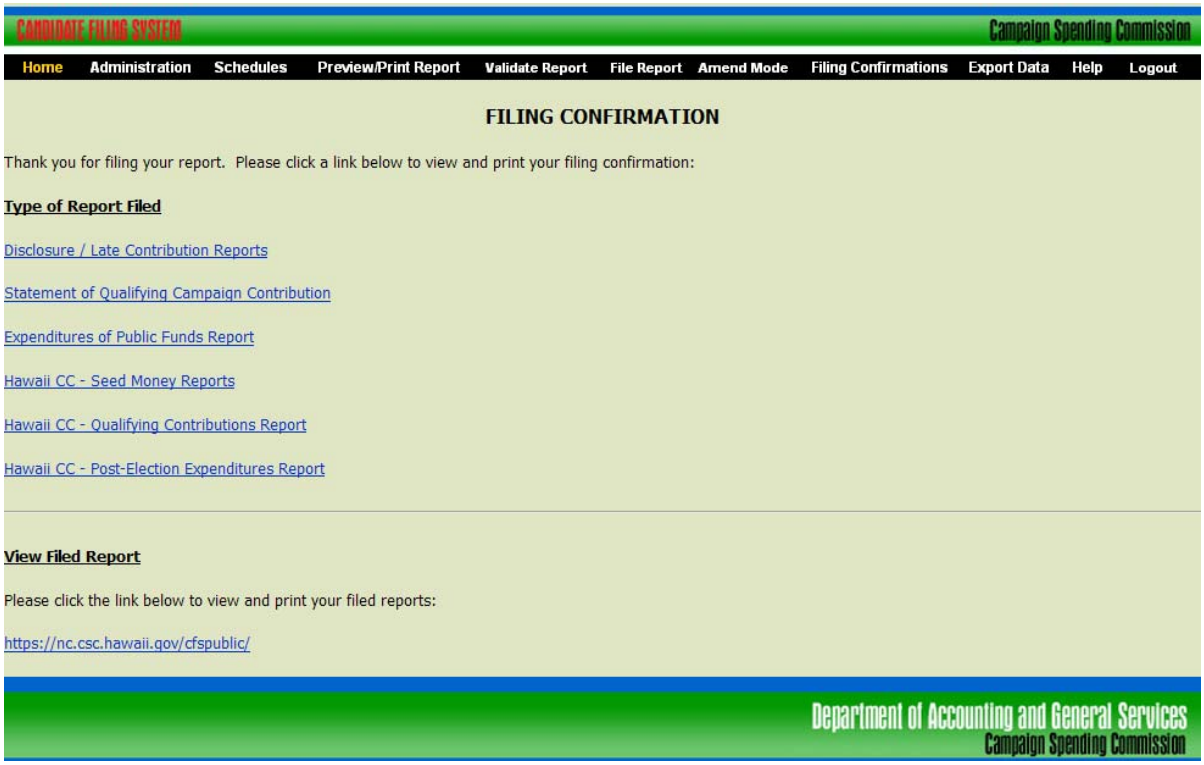


4. Click File Report only once to file the report.

5. Click Cancel if you do not want to file the Post-Election Expenditures Report; or click OK to file the report. It may take a few moments to file the report. Please be patient. DO NOT RE-CLICK FILE REPORT OR CLOSE THE INTERNET BROWSER BEFORE YOU GET THE FILING CONFIRMATION.



6. The filing of the Post-Election Expenditures Report is confirmed when a screen appears as follows:



7. Click Hawaii CC - Post-Election Expenditures Report to confirm that the report was filed.

Checking That Report is Filed

If a report is not listed after clicking on the applicable link to confirm that it was filed, try to re-file the report again. Make sure you don't close the internet browser before you receive the filing confirmation.

If the report is re-filed, but still not listed, contact the Commission immediately at (808) 586-0285. (Remember, we are only open Monday-Friday, 7:45 a.m. to 4:30 p.m. excluding holidays and furlough days, so don't wait until the last minute to get help, file early.)

Even if the report is listed on the filing confirmation screen, we strongly recommend a second check. Click the public website link (https://nc.csc.hawaii.gov/cfspublic/) on the screen to view the report or access the public site at www.hawaii.gov/campaign. Under "View Reports",

click "Candidate Committees," and then "Candidate Contribution and Expenditure Reports" to search for the report. If the report is not listed on the public site, your report was not filed.

8. Filing Confirmations

Filing confirmations for Seed Money Reports, Qualifying Contribution Reports, and Post-Election Expenditure Reports can be viewed and printed by clicking the "Filing Confirmations" tab. This tab allows you to track reports filed on the CFS. If a report is not listed, it means that the report was not filed on the CFS.

Seed Money Report

1. Click on "Hawaii CC - Seed Money Reports" to view the filing confirmations for the Seed Money Report.

The following screen will appear:

2. Use your internet browser's print function to print a copy for your records.

Qualifying Contributions Report

1. Click on "Hawaii CC - Qualifying Contributions Report" to view the filing confirmations for the Qualifying Contributions Report.

The following screen will appear:

2. Use your internet browser's print function or click Printable version to print a copy for your records.

Post-Election Expenditures Report

1. Click on "Hawaii CC - Post-Election Expenditures Report" to view the filing confirmations for the Post-Election Expenditures Report.

The following screen will appear:

2. Use your internet browser's print function or click Printable version to print a copy for your records.