



STATE OF NEW MEXICO
MAGGIE TOULOUSE OLIVER
SECRETARY OF STATE

2023 FINANCIAL DISCLOSURE STATEMENT CFIS REGISTRATION & FILING INSTRUCTIONS

Campaign Finance Information System (CFIS): <https://login.cfis.sos.state.nm.us>

REGISTERED IN PREVIOUS YEARS

(for First Time Registering, go to Page 3)

If you have registered in the Campaign Finance Information System (CFIS) and filed Financial Disclosure Statements (FDS) in previous years, use your existing USER NAME and PASSWORD to login to the system. If you are uncertain about your user name or password, you can find your name or reset your password from the login box:

Registered User Login

User Name

Password

[Forgot your User Name or Password?](#)

SIGN IN

1. Once you've logged in to your FDS account, go to the ADMINISTRATION page from the left column menu. On the right-hand side of the page, click on the button BEGIN FILING FOR 2023.

FINANCIAL DISCLOSURE STATEMENT

- Home
- Statements
- Administration**
- Public Site
- Logout

2022

BEGIN FILING FOR 2023

FEES AND FINES CORRESPONDENCE / DOCUMENT IMAGES

Outstanding

ADD FEE ADD FINE

2. Begin by **UPDATING** your reason for filing. Even if you have no changes, you will need to update this. Click on the three dots at the far right end of the line item and click **EDIT**.

The screenshot shows the 'Financial Disclosure Statement Filer Registration' page. On the left, a navigation menu has 'Administration' highlighted with a red box. The main content area has a 'Filing Date' of 01/25/2023. Below this, there are radio buttons for 'Candidate', 'Incumbent', 'Appointed to', and 'Employee of'. A table below shows a row for 'Appointed to' with the information 'DEAF AND HARD-OF-HEARING PERSONS, COMMISSION FOR' and a date of '06/23/2022'. A red callout box with an arrow points to the three-dot menu icon in the 'Actions' column of this row.

3. Make any necessary changes to this section (candidate, appointee, board, commission or state agency, date), or this may require no changes. When finished, click **UPDATE REASON FOR FILING**, after which the update should be reflected in the line item.

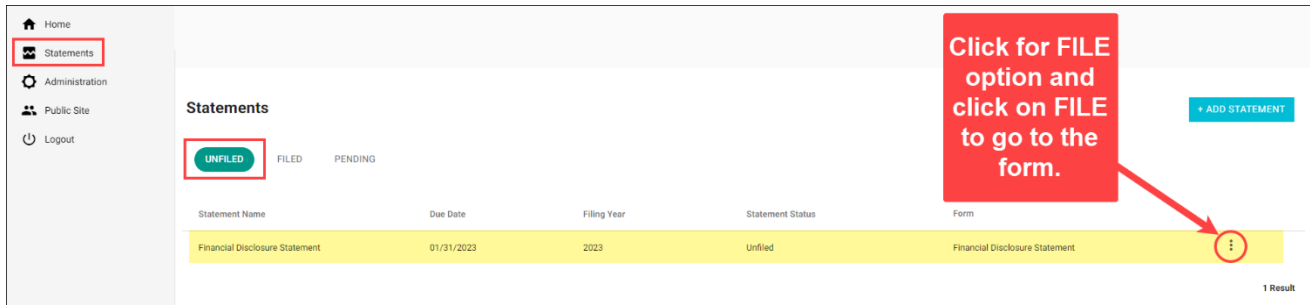
This screenshot shows the same page as the previous one, but with the 'Appointed to' radio button selected. The 'Board/Commission/State Agency' dropdown is set to 'DEAF AND HARD-OF-HEARING PERSONS, COMMISSION F...'. The 'Date of Current Appointment' is 06/23/2022. A red callout box points to a blue button labeled 'UPDATE REASON FOR FILING'.

4. Review remaining information on form, then complete the registration update by clicking the attestation box, providing your electronic signature (typing your name) and clicking **SUBMIT** in the lower right hand corner of the form. If **SUBMIT** is not active (turned blue green), check the form for any missing information.

The screenshot shows the 'Reporting Individual Contact Information' form. It includes fields for 'Phone' and 'Email'. Below these is a yellow attestation box with a checkbox and the text: 'I hereby swear or affirm under penalty of law that all information on this form is true, correct, and complete to the best of my knowledge.' A red callout box points to this box. Below the attestation is a signature line with the text 'Type Name Here' and 'Electronic Signature of Reporting Individual'. A date field shows '01/25/2023'. At the bottom right, there are 'CANCEL' and 'SUBMIT' buttons. A red callout box points to the 'SUBMIT' button.

You will receive a confirmation notice indicating that your registration has been submitted. Click **FINISHED** to close out the confirmation.

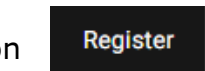
- To get to your 2023 statement form, go to the STATEMENTS page from the left-hand column menu. With the UNFILED tab highlighted, you should see your 2023 statement as a line item.



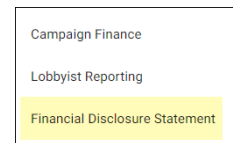
FIRST TIME REGISTERING

If this is your first time filing a Financial Disclosure Statement in the Campaign Finance Information System (CFIS), you will need to register and set your password/security question before filing.

- Go to the Campaign Finance Information System (CFIS) and click on **Register** in the upper right hand corner of the home page.



- Select Financial Disclosure Statement from the dropdown options



- Select the reason you are filing and answer each question that results from your previous answer. If you are filing as a Candidate, Incumbent, Appointee or Employee, the system will request further information based on your selection. EXAMPLES:

Please Select your reason for filing. You may add more than one reason for filing. I am a [?]

Candidate
 Incumbent
 Appointed to
 Employee of

Office: State Representative → Jurisdiction: Santa Fe → District: DISTRICT 41

ADD REASON FOR FILING

Please Select your reason for filing. You may add more than one reason for filing. I am a [?]

Candidate
 Incumbent
 Appointed to
 Employee of

Board/Commission/State Agency: ALCOHOL SERVER EDUCATION ADVISORY COMMITTEE
 Date of Current Appointment: 01/03/2022

ADD REASON FOR FILING

4. Be certain that you click on **ADD REASON FOR FILING** before proceeding. You will see the reason added to as a line item (example below). You can add additional offices/positions as necessary, following the same process, and filing one statement for all filing reasons. However, if you do NOT have any additional reasons to add, do NOT click on any other options here, or you will need to start over!

Please Select your reason for filing. You may add more than one reason for filing. I am a [?]

Candidate
 Incumbent
 Appointed to
 Employee of

Reason for filing	Information	Date	Actions
Appointed to	ALCOHOL SERVER EDUCATION ADVISORY COMMITTEE	01/03/2022	⋮

5. Complete the remainder of the form, ensuring that you enter information in all fields underlined in **RED**. These are required fields and you will not be able to save information unless all required fields contain information:

Reporting Individual

Prefix First Name Middle Name Last Name Suffix

Reporting Individual Address Information

Residence Address Apartment, Building, Suite, etc.

City State Zip Code

Mailing address if different

Reporting Individual Contact Information

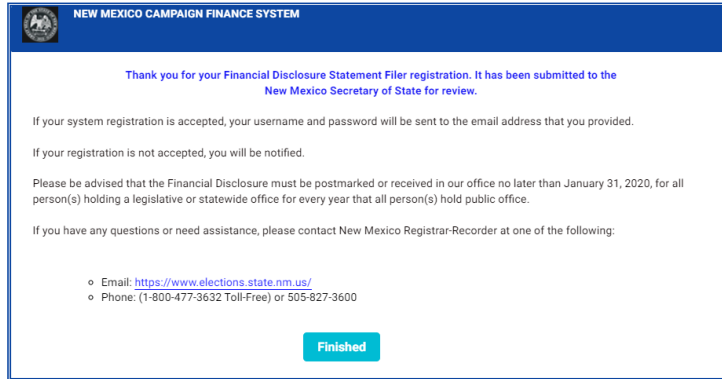
Phone Email

I hereby swear or affirm under penalty of law that all information on this form is true, correct, and complete to the best of my knowledge.

Type Name Here

Electronic Signature of Reporting Individual Date

6. When you have completed your reason for filing and all required fields, the SUBMIT button will activate by turning blue green. Click on **SUBMIT**
7. You will receive a message to verify that you are ready to submit your registration. Click **OK/Submit** to complete registration. You will receive a confirmation pop-up stating that your registration has been submitted to the Secretary of State for review. Click on **Finished** to finalize.

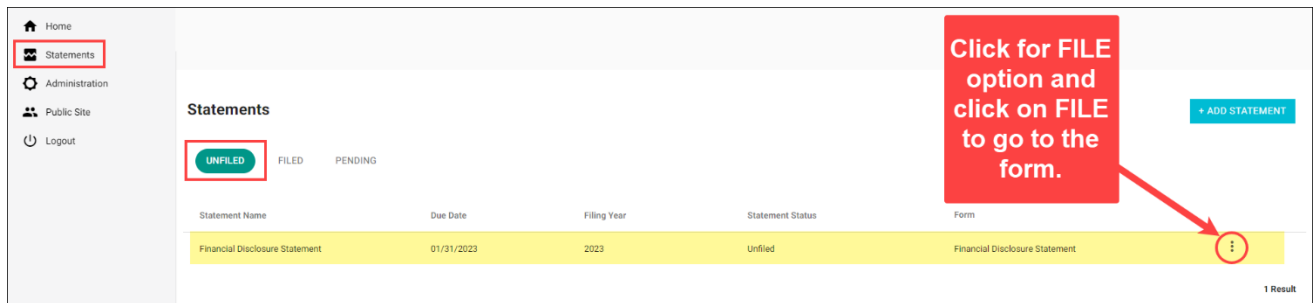


If you have no other CFIS profiles, you will receive an email from the system containing a link to authenticate and activate your CFIS account by setting a password and security questions. You will not need to authenticate if you have other CFIS accounts but will have profile options when logging into CFIS.

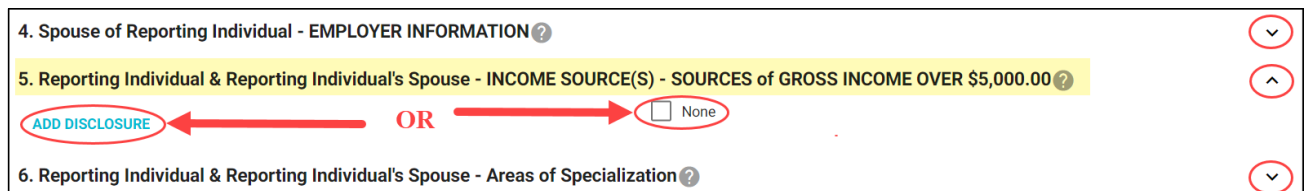
If you have multiple profiles in CFIS...a candidate account and an FDS filer account, for example...you will be asked while logging in to select the profile you wish to work in. Select Financial Disclosure Statement [FDS] filer to file this statement.

COMPLETING AND FILING STATEMENT

1. Login to your CFIS Financial Disclosure Statement filing account.
2. To access the Financial Disclosure Statement form, go to the Statements page from the left column menu. With the UNFILED tab highlighted, click on the three-dot ellipsis at the right end of the statement and selecting FILE (or RESUME if you have previously entered and saved information)



3. Once in the form, you will see multiple categories of questions. By clicking on the “carrot” or bolded text for each line, you will see the option to either “ADD DISCLOSURE,” or a check box with the word NONE, indicating that you have nothing do disclose in that category:



(You will need to enter some information for each category, whether adding a disclosure OR clicking “None,” before you are able to file your report.)

- After you have entered information (or clicked the NONE check box) for each of the categories and Acknowledgements Panel at the bottom, scroll back up to the top of the form. At the top right side, you will be able to either **SAVE** your work and return later to complete it, see a **PREVIEW** of your statement in PDF form, or click on **FILE STATEMENT** when you are ready to file.

- If you have missed any of the items, you will receive a message to fix those items before having the chance to sign and submit. If everything is completed as necessary, you will receive the signature pop-up box.

- In the signature box, enter your name and title. Once all categories have some entry (or are marked NONE), and you have provided your electronic signature and title, the AGREE button will activate (turn blue green).

When you click AGREE as above, you will receive a pop-up confirming that you have filed your statement.

- To print a copy of the Financial Disclosure Statement for your records, go to the Administration page, click on [CORRESPONDENCE / DOCUMENT IMAGES](#) then click on the report confirmation to download the PDF.