Campaign Finance Information System
Financial Disclosure Statement Filing

User Guide

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Revision History

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Jennifer Zolikoff	06/08/2020	Base Document Update for NM Customizations	1.0

1 Introduction

1.1 Purpose

This training guide is to serve as an outline for trainers from the Bureau of Elections and Ethics Division of the state of New Mexico when training end users in the use of the Financial Disclosure Statement module in the Declare Ethics & Disclosure Suite. It has also been designed to be used by end users as a quick reference to the application. Separate training guides have been developed for training of Administrative users of the Declare Ethics & Disclosure Suite, as well as, for use of the Campaign Finance Module and the Lobbying Module.

1.2 System Overview

1.2.1 Common Screen Elements

Information Icon

- These appear in various places throughout the application.
- Move your mouse over the icon (no need to click) to see a small pop-up of text which contains information relevant to the function or screen you are on.

Datagrids and Lists

- In many places, you will see data that is displayed in rows contained within multi-paged, sortable datagrids or lists.
- The grids default to 10 rows per page. At the bottom is a small dropdown where you can choose to change the grid to show 25 or 50 rows per page.
- Rows can be sorted by any column by clicking on the column heading. Click again to toggle the sort between ascending and descending sequence.
- Most rows will have one or more actions that can be taken by the user. These will appear in an action menu on each row, which is shown an ellipse ⋮ icon. Click the icon to view and select the available actions.

Dates

- When clicking into an editable date field, a calendar will pop open for you to select a date. It will default to showing the selection on the current date.
- You may scroll the calendar to get to past or future months. As an alternative, you may also click a specific month/year to get to a specific time frame immediately.
- Clicking a date will select that date, close the calendar, and display the date in the entry field.

Dropdown Lists

- Dropdown lists are used for data entry purposes when there are established standardized choices for the particular data needed. Examples include contribution type, election type, or occupation.

- In some cases, the list includes an “Other” option. If this is selected, a textbox will be shown for you to enter details or a short explanation.

Textboxes

- Textboxes are used for free-form entry of data (examples: names, addresses, city, explanations or descriptions)

Checkboxes

- Often checkboxes will be used to select options.

Action Menus

- In a list, action menus are shown as an ellipse  which can be clicked to show the list of options.
- Action menus may also show up as button. When clicked, it shows the options in a dropdown list.

1.2.2 Required Fields

Required fields are underlined in red. If the red is not present, the field is optional entry.

Occasionally a field may first be displayed as optional entry (no red underline), but during the data entry process it becomes required (red underline appears). This can occur as a result of other data values or dropdown selections that have been made which now require additional data to be provided.

If required fields do not contain data, dialogs cannot be saved. In most cases, the *Save* or *Update* buttons are disabled until all required data is present. In other cases, error messages will be shown to remind you of missing required data if you attempt to save before all required data is entered.

1.2.3 System Notifications

Toast messages

These provide simple feedback in a small panel at the bottom of the screen. They are visible for a short while, long enough to be read, then they disappear. There is no need to respond to toast messages. An example of a toast message would be “Your report has been successfully filed”.

Pop-ups

When a message needs to be acknowledged, or you need to verify an action before it can continue, a pop-up message will be shown. You will not be able to proceed without clicking *OK* or *Cancel*. For example, if you enter an edit for a contribution and then close the dialog before saving the updates, a pop-up will be shown at the top of the screen which says, “Closing before saving will discard all progress.” If you click *OK*, the dialog is closed as intended. If you click *Cancel*, you are returned to the dialog which remains open.

Emails

The system automatically sends email notifications which include requested information, reminders, or may be triggered by system events. For this reason, it is very important to be sure the system has your up-to-date email address. For information on updating your email address, see Amending Your Registration.

Notifications include:

- Automatically sent
    - Confirmation of registration submission
    - Registration accepted
    - Registration conditionally accepted
    - Registration rejected
    - User login credential information
    - Username and/or password reminders
- Batch sent
    - Upcoming statement due reminder
    - Notification of unfiled statements
    - Notification of fines imposed

2 Registration

In order to use the Financial Disclosure Statement Filer Module, of the Declare Product Suite, to input data and file statements, you must register in the system and be assigned login credentials. If you already have login credentials for one of the other two modules, Lobbying or Campaign Finance, registering with the same email will ensure that you do not get a new set of credentials.

2.1 Registering for Access to the Financial Disclosure Statement Filer Module

To begin the registration process, navigate to the Financial Disclosure site and click on the Register link. Select the Financial Disclosure Statement registration option. The Registration Screen will be displayed.

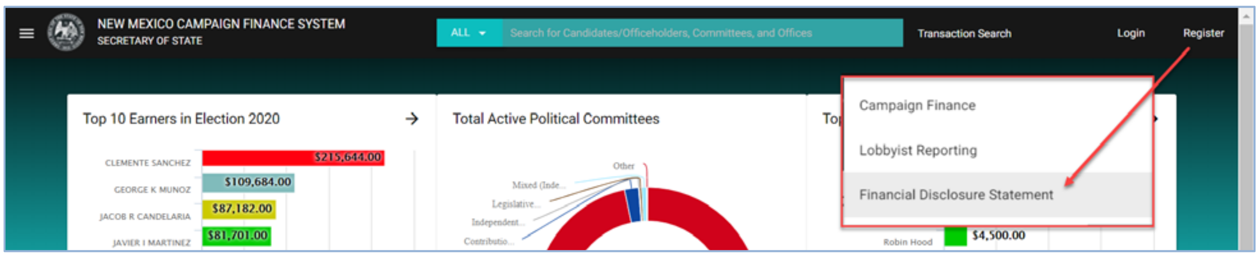

Figure 1: Homepage of the New Mexico Campaign Finance System

2.1.1 Enter Registration Information

Registering is a simple, short process. Select your reason for filing the Financial Disclosure Statement (Candidate / Incumbent / Appointed To / Employee Of). This selection will drive what information is captured next.

Once you have entered the required information, click **ADD REASON FOR FILING** button.

If you have more than one reason for filing the Financial Disclosure Statement, you can enter multiple reasons. Entered reasons will be displayed on the registration screen.

> Note: The Reason for Filing will determine the due date for the filing of the Financial Disclosure Statement. If two reasons for filing have been entered, the earliest due date will be assigned for the filing.

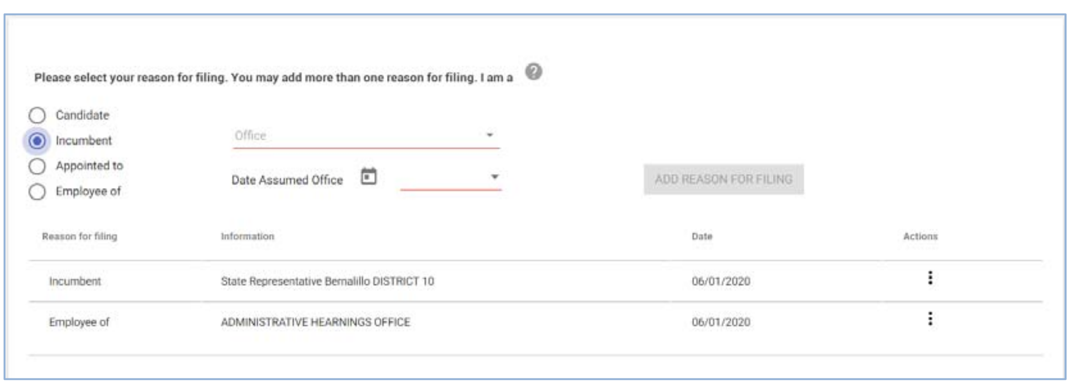

Figure 2: Financial Disclosure Statement Filer Registration Screen – Reason for Filing

Enter Reporting Individual information on the registration screen.

Note: If a registrant uses the same email that was used for registration with the Campaign Finance Module in the Declare Product Suite then the registrant will be able to use one set of credentials for accessing both modules, Campaign Finance and Financial Disclosure Statement Filer modules.

After reading the acknowledgement statement, check the acknowledgement checkbox and enter your name as the electronic signature. The date defaults to the current date and is a protected field.

Click SUBMIT to submit your registration. The SUBMIT button will not be enabled until all required information is entered. You will receive an email confirming the registration submission. A PDF will not be generated until the Financial Disclosure Statement is filed.

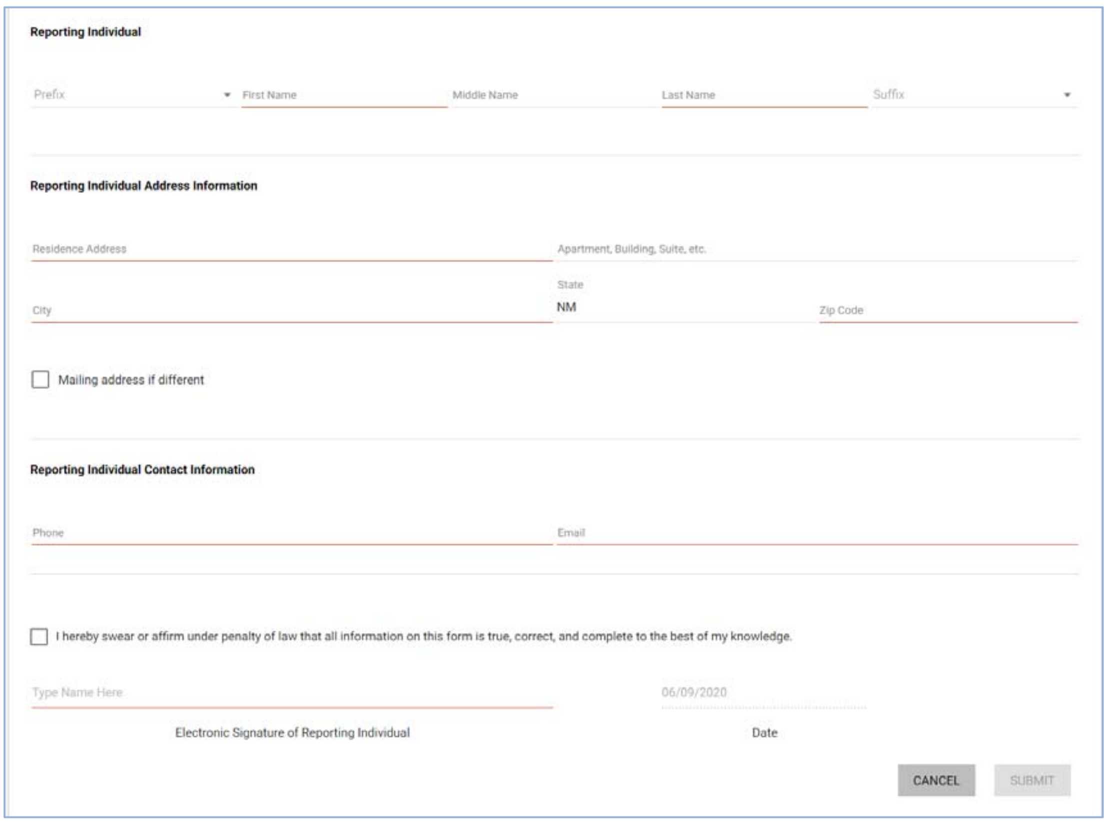

Figure 3: Financial Disclosure Statement Filer Registration Screen – Reporting Individual Information

2.1.2 When your Registration is Accepted

When your Financial Disclosure Statement Filer registration is submitted, the staff of the Bureau of Elections and Ethics Division will review your registration. Once they approve it, your filer account will be made active in the system and you will receive a confirmation email.

2.1.3 Receiving Login Credentials

Login credentials will automatically be assigned to you when the registration is accepted by the New Mexico Secretary of State. You will receive an email with instructions for logging into the application. The credentials generated by following the instruction received will allow you to access the Financial Disclosure Statement Filer module. If the same email was used with both the Financial Disclosure Statement Filer module and the Campaign Finance module, you do not need to authenticate the account again. You can proceed straight to signing in.

3 Your Financial Disclosure Statement Filer Dashboard

3.1 Signing In

To begin the sign in process, navigate to the New Mexico Campaign Finance System public site.

Select the *Login* link in the page header. The Registered User Login dialog will be shown, with space for you to enter your username and password.

> Note: If you have forgotten your User Name or Password, there are links to retrieve your User Name and reset your password on the Login dialog.

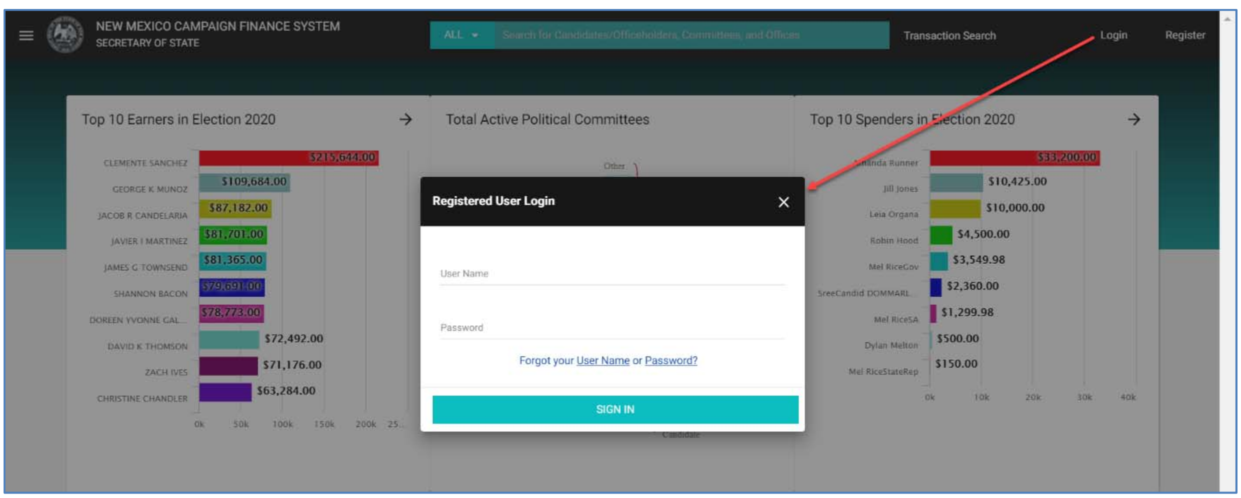

Figure 4: Login Dialog

Enter your username and password. Click 

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If you only have access to the Financial Disclosure Statement Filer Module (FDS Module), you will be taken directly to the Filer Dashboard.

If you have access to more than one Declare Module, you will see a list of any committees you are associated to, as well as, your Financial Disclosure Statement Filer account. Select the Financial Disclosure Statement Filer to log into the FDS module. You will then be directed to the Home page for your Financial Disclosure Statement Filer Dashboard.

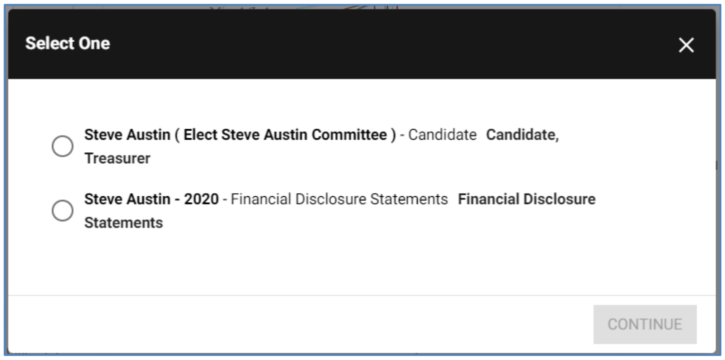


Figure 5: Select Committee dialog

3.2 Dashboard Overview

3.2.1 Home Page

Upon logging into the system, you will be on the home page for your dashboard. When the home page is first opened, the center portion of the screen shows the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list. These areas will not be visible if there is no data to display.

If you navigate to another functional area from the Dashboard Navigational Menu on the left-hand side of the screen, the center portion of the screen will be overlaid with different functions as you select navigational menu options. Clicking the *Home* menu option returns the screen to its initial format with the three lists.

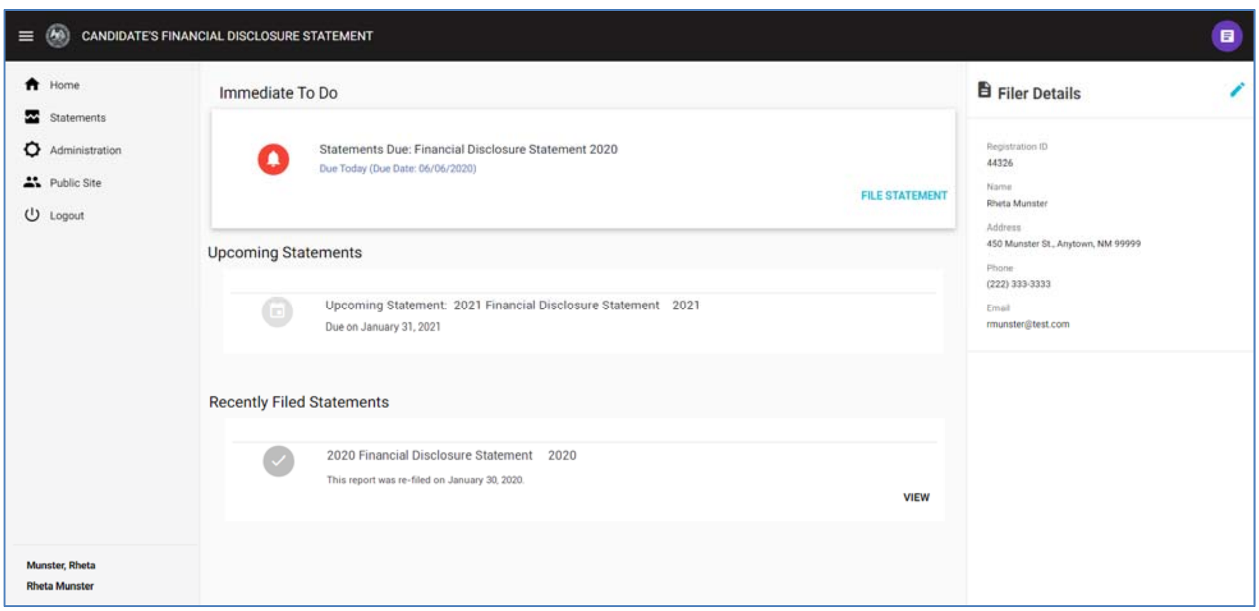


Figure 6: FDS Module Home Screen

3.2.2 Immediate To Do

The Immediate To Do list shows you items that you need to be aware of or that need to be completed. For example, when a statement is due, an item would show up to remind you to file the statement. There is a link to preview the statement without submitting it, and also a link to directly open the File Statement Dialog where the selected statement can be submitted.

3.2.3 Upcoming Statements

The Upcoming Statements List shows you which statements are going to be coming due.

3.2.4 Recently Filed Statements

The Recently Filed Statements list shows you all statements that were most recently filed. On each, there is a *View* link which will show you a PDF of the filed statement.

3.2.5 Dashboard Navigational Menu

The Dashboard Navigational Menu is on the left side of the screen. Each item in the menu, when clicked, will open up in the center part of the screen. Clicking the *Home* menu option returns the screen to its default view with the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list showing.

Clicking the ≡ icon in the header above the panel will display/hide the Dashboard Navigational Menu.

3.2.6 Filer Details Panel

Along the right side of the screen is a small panel showing your name, address, phone and email. For more information about this panel, see Filer Details in the Filer Administration section.

4 Filing Statements

4.1 Forms

This system has been configured to allow for the electronic filing of the Financial Disclosure Statement.

4.2 Statements Screen

The Statements Screen is displayed after selecting *Statements* from the Dashboard Navigational Menu.

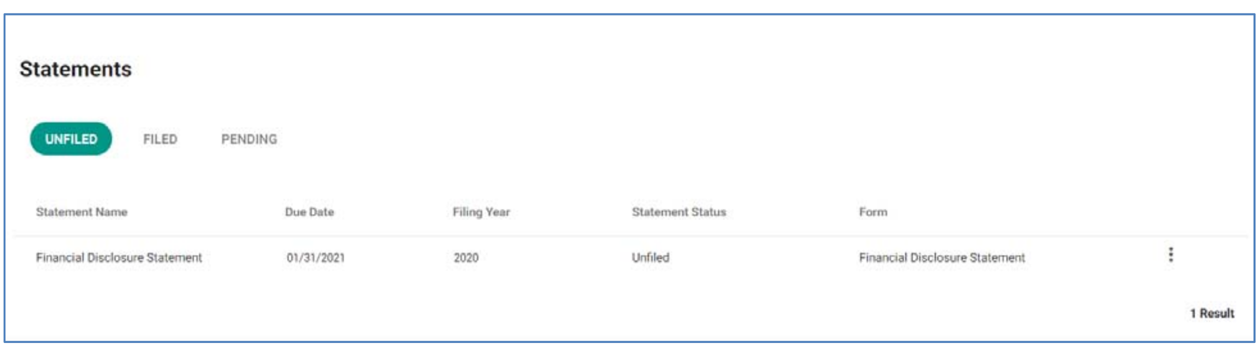


Figure 7: Statements Grid Showing Unfiled Financial Disclosure Statements

Figure 8: Statements Gird Showing Filed Reports and Amendments

4.2.1 Unfiled, Filed, and Pending Statements Lists

- On the Statements screen, click the *Unfiled, Filed, or Pending* tabs to see lists of statements in those three categories.
    - **Unfiled** – This list includes statements that have not been filed yet. If the statement has been started and saved, but not yet submitted, it still shows in the Unfiled list.
    - **Filed** – Once a statement is filed, it is shown in the Filed list, and is removed from the Unfiled list. If the statement has had an amendment, it also is shown. All versions of a statement (original filing and amendments) are shown in the expandable/collapsible panel under the main report row. This panel is opened and closed by clicking the caret icon next to the statement name.
    - **Pending** – This shows any statement that has been started and saved, but not yet submitted. This could be a new statement you are working on, or it could be an amendment to a previously filed statement.
- In each list, the statements have an Action Menu which is obtained by clicking the ⋮ icon. It contains one or more options, depending on the status of the statement.
    - Options for unfiled statements that have not yet been started:
        - *File* - This link opens the File Statement dialog where you will enter your statement information and file the statement.
    - Options for unfiled statements that have been started and saved, but not yet submitted:
        - *Preview* – Clicking this link displays a PDF of the statement as it would look if filed with the statement information that has been added to the statement so far. Note that this action does not file the statement.
        - *Resume* – This link is used to continue working on your statement. It will open the File Report dialog. Your statement information will show up as it was when you last saved the statement, and you may continue entering your statement information.
        - *Discard* -
            - For an amendment to a filed statement, the *Discard* action removes the pending amendment and all the data entered since the statement was last filed. The last filed version of the statement remains in the Filed list.
    - Options for filed statements:

- *View* - displays a PDF of the filed statement. For amended statements, each version can be viewed.
- *Refile* – This opens the report filing screen. Your statement information will show up as it was when you last filed the statement. You may make modifications as needed, and, like the original filing process, you can either save the amendment as pending in order to complete it later, or you can file it.

4.3 File Statement Dialog

When the File Statement Dialog is first opened, you will see a header and a list of categories. These category names are actually collapsed panels where different categories of required statement information will be entered. The Financial Disclosure Statement Filing Screen will look like this:

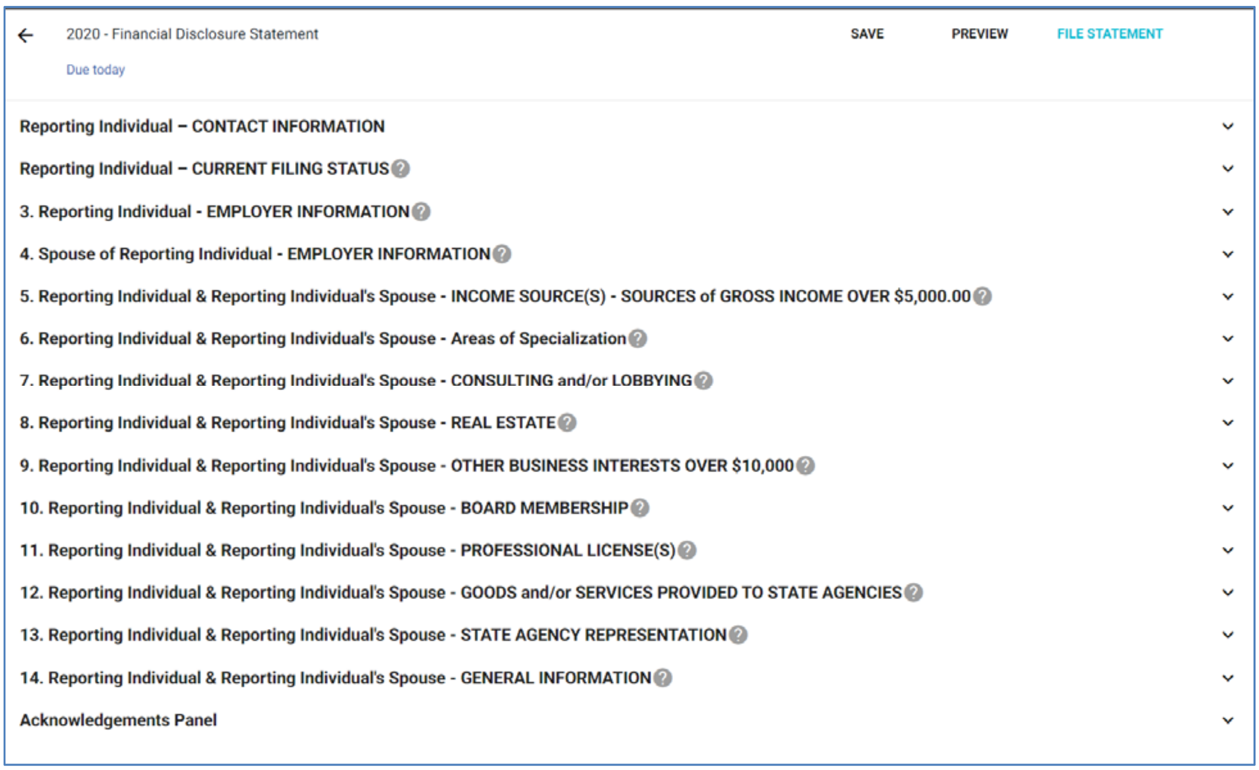


Figure 9: File Financial Disclosure Statement Screen

4.3.1 Header Area and Action Links

The header area includes the name of the report, the number of days until the report is due, an arrow to return to the Statements screen, and these action links:

- *Save* will save the data you have entered so far, but does not file the statement. This is for your convenience, so you have the ability to stop and resume at a later time without losing anything you have entered. The report will not be visible on the public site if it has been saved, but not yet filed.
- *Preview* will display a draft version of the PDF of the statement as it would look if you filed it with all of the data entered so far. This action does not file the report.

- *File Statement* is used when you are ready to file the statement. Once this is done, the filing becomes available on the public site to be viewed. After this, any changes needed on the statement will have to be filed on an amendment. (hint: Hover your mouse over the FILE STATEMENT button to display what sections of the Financial Disclosure Statement still need to be completed.

4.3.2 Category panels

The category panels can be expanded or collapsed by clicking the caret icon shown to the right of each heading.

4.3.3 Sequence of Data Entry

It is a good practice to enter the information in the order it is listed. This is because some of the data in an early section may be needed for a later section. For example:

- *Reporting Individual – CONTACT INFORMATION, Spouse's Name*
    - Information entered in Spouse's Name will be used to populate fields in other categories, such as section 4. Spouse of Reporting Individual – EMPLOYER INFORMATION.

4.3.4 Entering the Statement Information

- Some categories are required to have data entered, such as *Filer Information*. This data is not optional. When you expand the category, you see fields for all of the information that should be entered. In the case of filer information, it will be pre-populated where possible from your registration. You may edit this information as needed. You will need to enter Spouse's Name, if applicable.

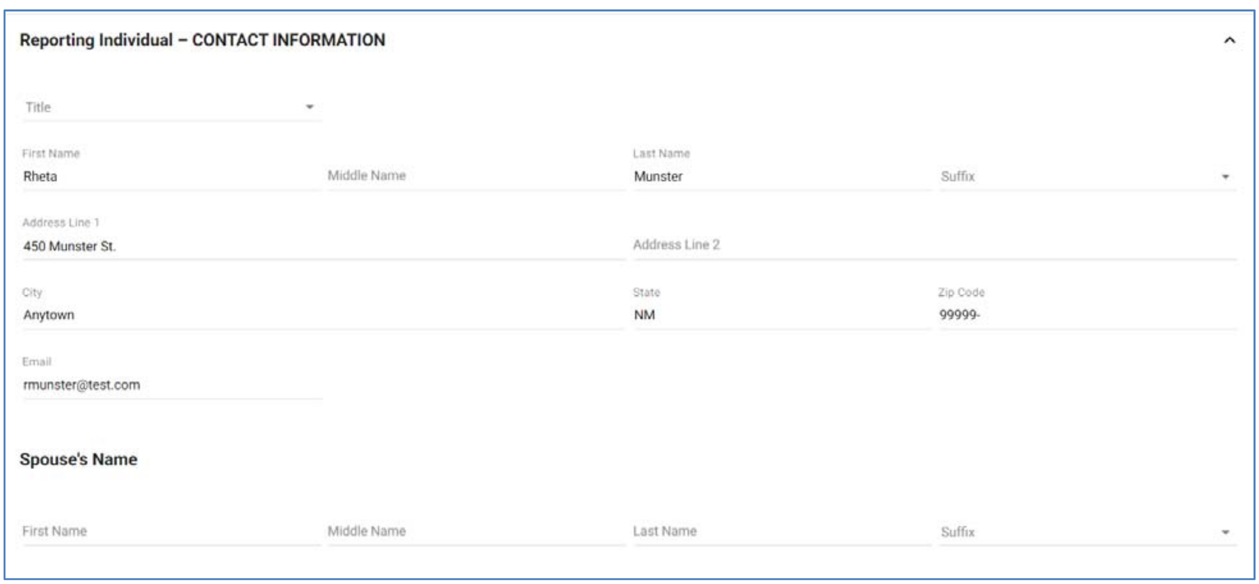


Figure 10: Filer Information Panel

- In other sections, you will have the option to add information if it is applicable to your statement, or you may indicate that you have nothing to report in that section by checking the *None* box provided for that. You must do one or the other.

The *Reporting Individual – EMPLOYER INFORMATION (section 3)* category is an example:

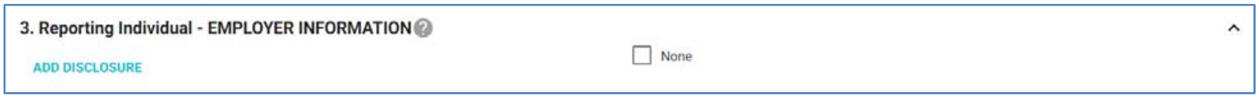


Figure 11: Reporting Individual – EMPLOYER INFORMATION (section 3) panel

- If you have no employment to report, check the *None* box.
- To add Employer Information, click the *Add Disclosure* button. A dialog to enter the Employer Information will be opened.

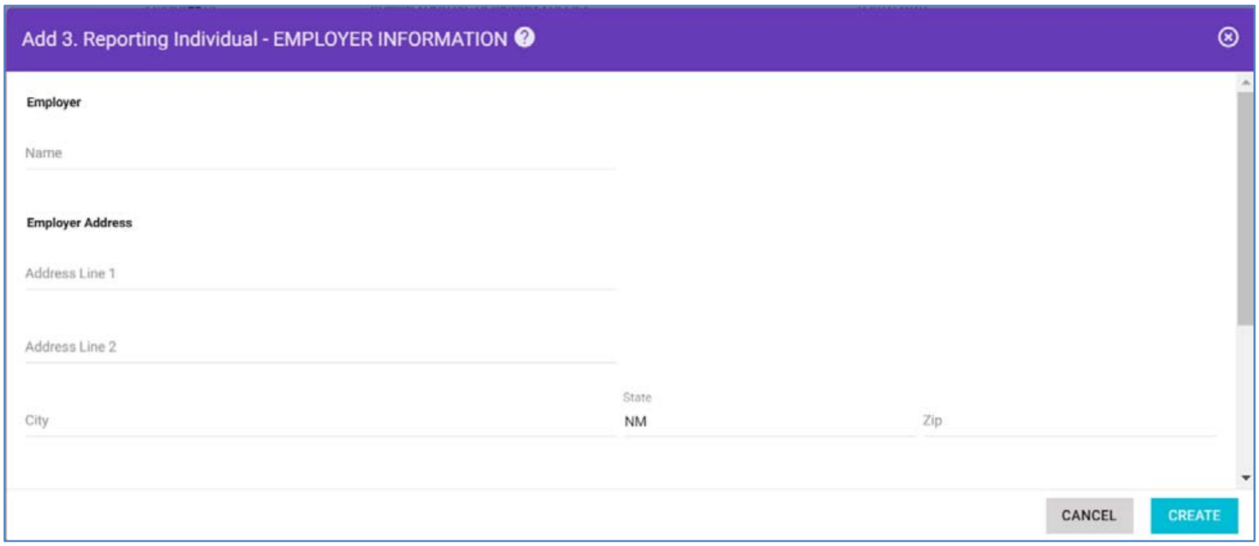


Figure 12: Add Employer Information Dialog

In this example, you would proceed to enter the information for one employer. The 

button is enabled for you to save the information to the statement.

When the item is saved, the Add dialog is closed, and you will see the employer has been added to a list in the Employer Information (section 3) category on the report screen. You may continue adding additional employers in the same manner, until all are entered and saved.

4.3.5 Updating or Removing Statement Information

Items added to your statement can be updated or removed if necessary.

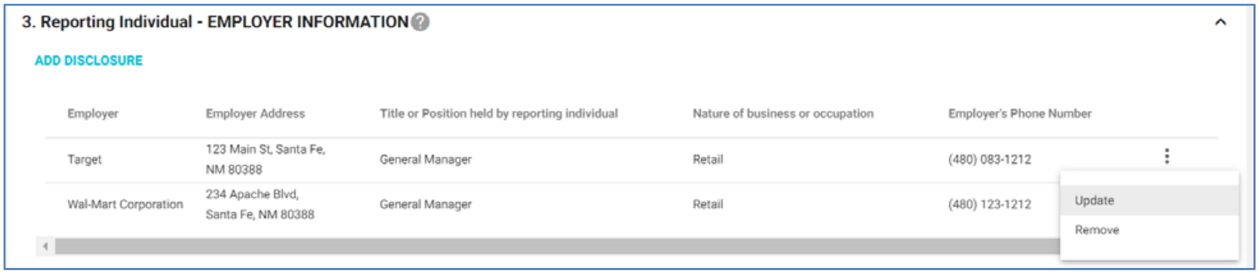


Figure 13: Action Menu to Update or Remove a Disclosure

- Any item can be updated by clicking *Update* in the action menu, which will open an Edit dialog, pre-populated with the information you have entered.
- An item can be removed from the report by clicking *Remove* in the action menu.

4.3.6 Acknowledgements

This section contains one or more acknowledgments that must be confirmed before you can file the statement. Whether there is one acknowledgment or multiple, it is required that you check each box to confirm your acknowledgment and acceptance of what is stated there.

For example:

Figure 14: Acknowledgements Panel

4.3.7 Filing your Statement

When you are finished entering all information that needs to be included on the Financial Disclosure Statement, you may file it by clicking FILE STATEMENT in the screen header area.

If you have not completed all required entry, the FILE STATEMENT link will be disabled. In this case, when you hover the mouse pointer over the FILE STATEMENT link, you will see a list of what is missing.

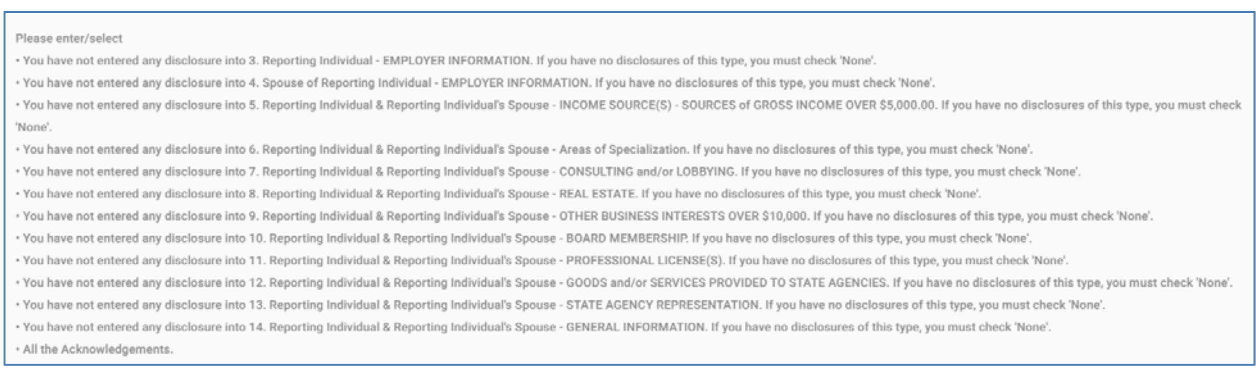


Figure 15: Remaining Sections to Complete

After you file your statement, you will receive an email confirming that the statement was successfully filed. The Financial Disclosure Statement will now be available for view on the public site.

4.3.8 Amending your Report

If a statement needs to be amended:

- Locate the statement in the Filed list on the Statements screen.
- Click the *Refile* link in the action menu.
- The File Report dialog will be opened with all of the previously filed information pre-populated.
- Make the necessary changes. As with a new filing, an amendment can be saved to be completed and filed later.
- When you are ready to refile the amended statement, click the File Statement link at the top of the screen.

4.3.9 When it is time to file the next year's statement

When the next year's report is to be filed, you will not initially see it on your Unfiled Statements list. You first need to update your registration, being sure to make any needed updates to your Filing Requirements.

- On the Filer Administration screen, the *Begin Filing for [Year]* button is visible to filers only when there is an active registration schedule for the next filing cycle.
- Clicking the button opens your Registration screen, which will be presented to you pre-populated with your current information.
- Modify any information as needed.
- Click *Update*.
- You will now be able to proceed to the Statements screen and file the next statement.

5 Filer Administration

The Administration page has a variety of administrative functions and general information about the Financial Disclosure Statement Filer.

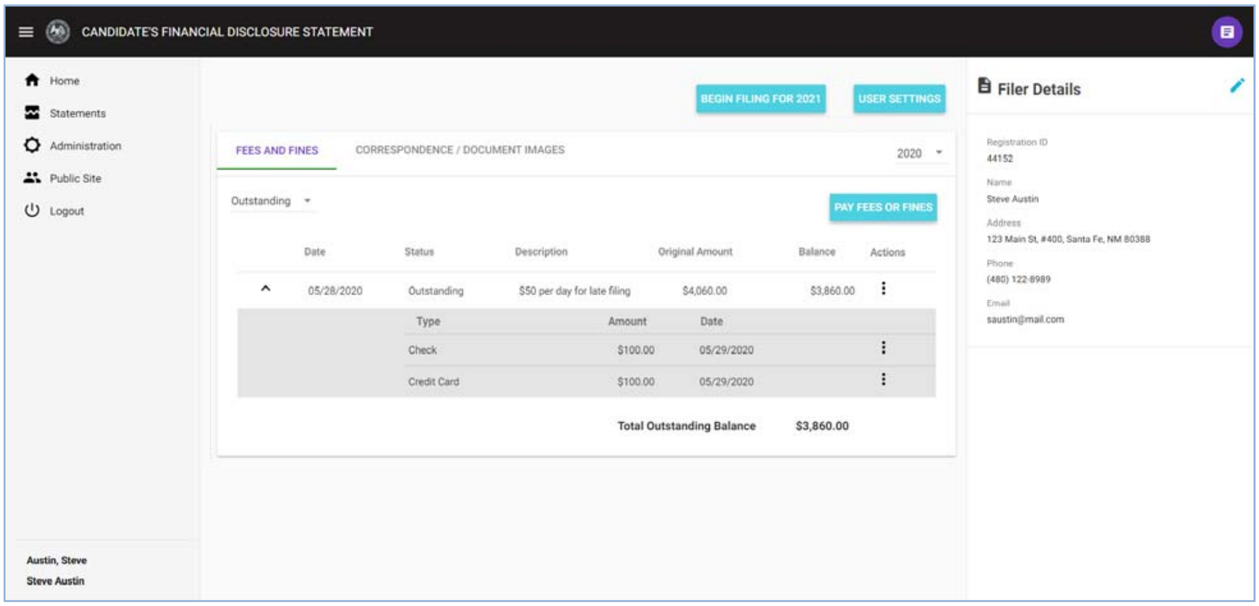
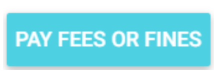


Figure 16: Filer Administration Page

5.1 Fees and Fines Tab

The Fees and Fines tab shows a list of fees or fines that have been assessed against you and your outstanding balance. From this tab, you can make payments towards any fee or fine. You can combine multiple fines or you can make partial payments. Any payments made towards fees or fines will be visible on the Fees and Fines Tab as a child record of the fee or fine.

5.1.1 Payment Dialog

To make a payment, click on the 

button. The Payment Dialog will be displayed. At the top of the screen, a list of all open fees and/or fines will be displayed. You have the option of selecting one fine to pay, multiple fines to pay, or a partial fine to pay.

- To pay for just one fine – select only one fine by clicking on one check box.
- To pay for more than one fine – select multiple fines by clicking on multiple check boxes.
- To pay for only a portion of a fine – select only one fine by clicking on one checkbox. Click on the action menu next to that fine and select Update Amount. The partial payment panel will display containing information about the fine. Update the Amount to Pay field with a partial payment amount. The Balance After Payment will be calculated. Click on UPDATE to save the partial payment. The payment has not been processed at this point. The Total field reflects the total amount of the payment to be made. If you have selected multiple fines, this amount will display the sum of fees and fines to be paid.

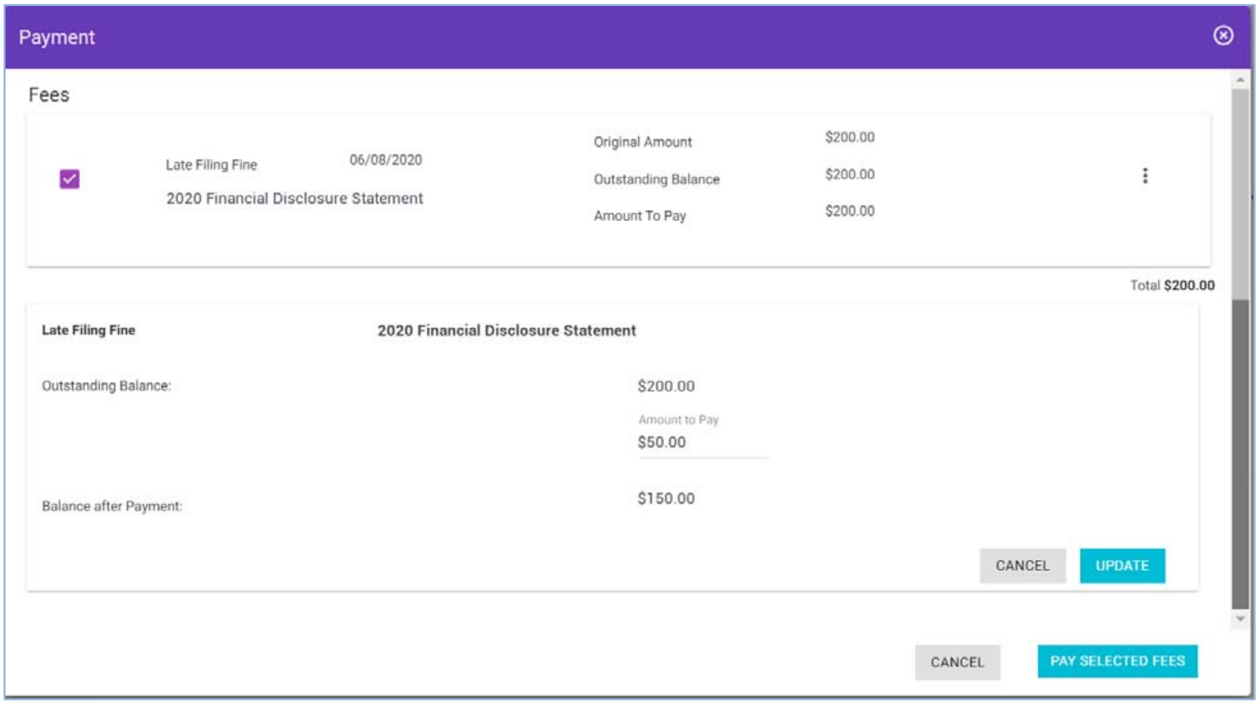


Figure 17: Payment Dialog with Partial Payment Panel Displayed

Once a selection has been made, click on PAY SELECTED FEES button. You will be given the option of paying with an e-check or a credit card. Selecting E-Check will display the E-Check processing dialog. Selecting credit card will display the credit card payment processing site.

> Note: There is a convenience fee that will be added to all credit card payments.

5.1.2 E-Check Payment Dialog

To pay with an e-check, first select the payor type. Is an individual or an organization making the payment? Enter payor information and billing information. Specify if the e-check is coming from a checking or savings account. Enter bank information including account number and routing number.

Click on PAY USING E-CHECK A receipt will be generated and stored in your Correspondence / Document Images tab. You will be returned to the Payment Dialog where the payment will finish processing.

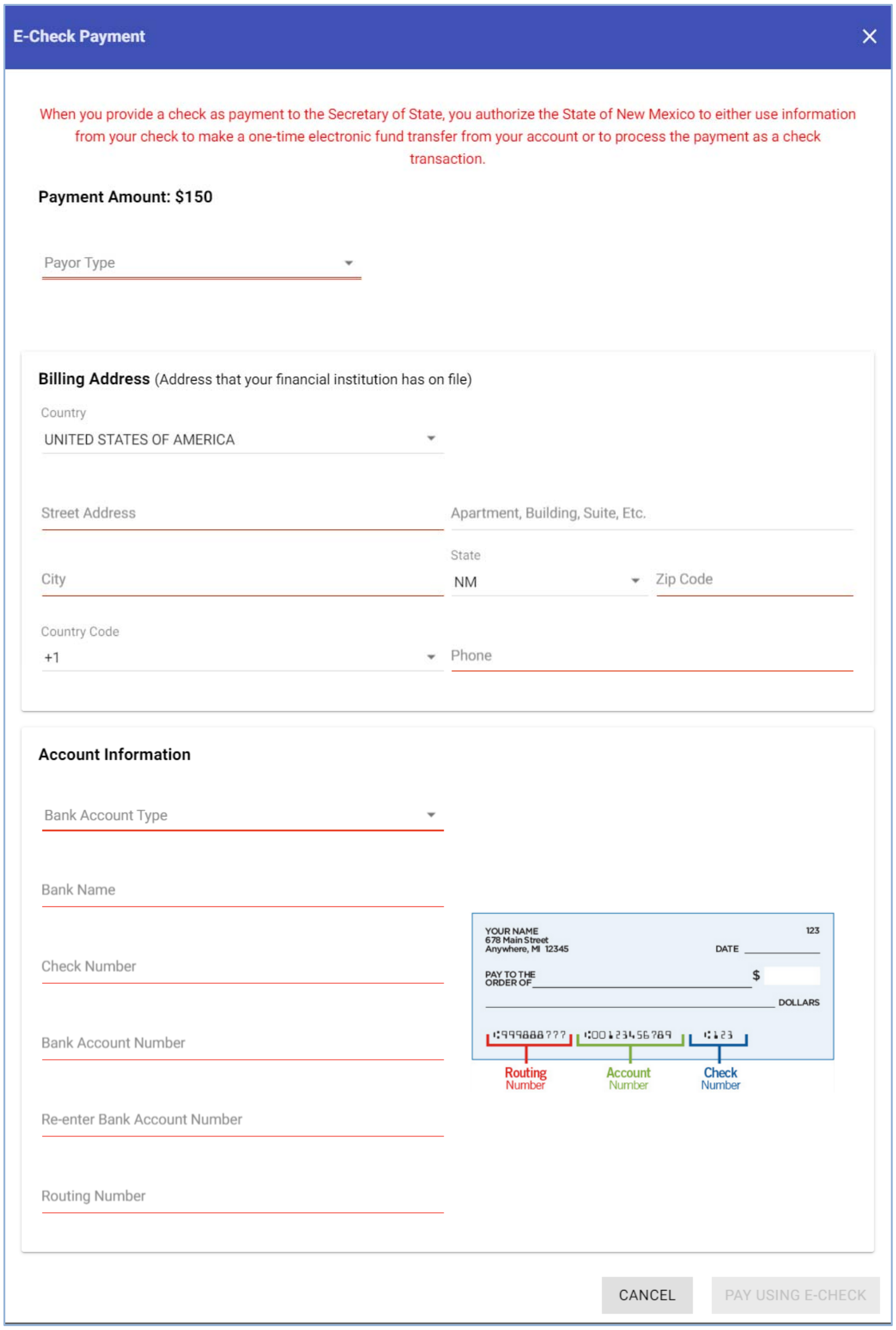


Figure 18: E-Check Payment Dialog

5.1.3 Credit Card Payment Dialog

To pay with a credit card, enter Billing Information. You will notice that the payment amount listed includes the convenience fee. Once you have verified the payment amount, click Next. Enter Payment Details. Clicking on Cancel Order will return you to the Declare Payment Dialog. Clicking on Next will give you a final opportunity to review the payment information before submittal. Clicking on the Pay button will submit the payment. A receipt will be emailed from the credit card vendor. A receipt will also be generated and stored in the Correspondence / Document Images tab.

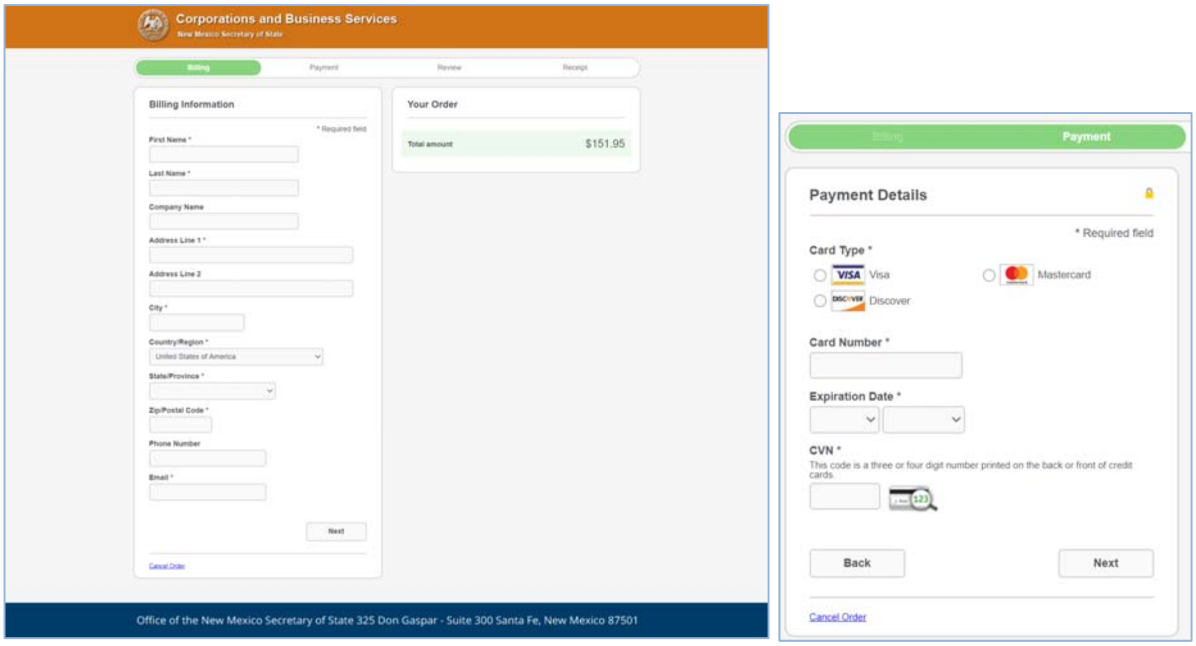


Figure 19: Credit Card Payment Dialog and Payment Details Panel

5.2 Correspondence / Document Images Tab

The Correspondence / Document Images tab shows a list of any correspondence or documents that have been uploaded to your account by the administrators, including filings that were submitted on paper and scanned. Correspondence includes any auto-imaged generated letters (for example - the registration confirmation letter) and any correspondence sent to you through the Declare product.

The documents in the list can be viewed by clicking the name of the document.

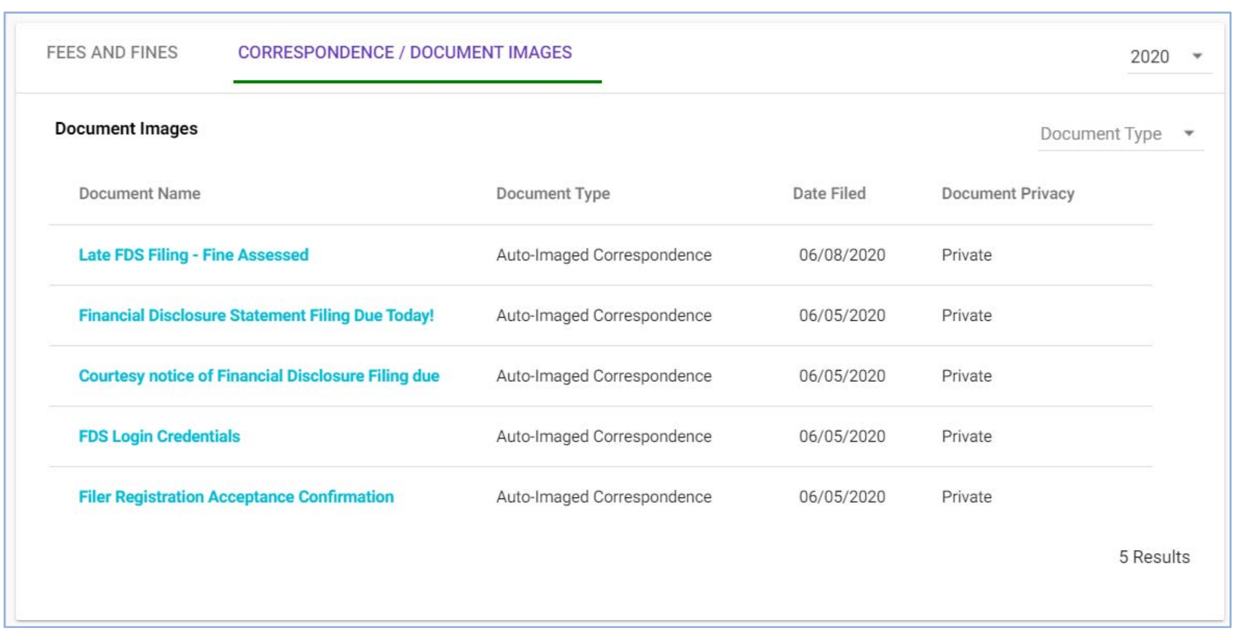


Figure 20: Correspondence / Document Images Tab

5.3 User Login Maintenance

You can change your password and security questions by clicking on  and selecting one of the options listed.

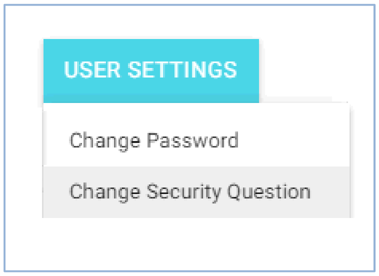


Figure 21: User Settings Menu

5.3.1 Changing Password

You have the ability to change your password by clicking on the Change Password option under User Settings on the Administration screen.

- To change your password, start by entering the current password in the Previous Password field.
- Enter the new password.
- Verify the new password by entering it a second time.
- If the password is valid, the *Save* button will be enabled. Click  to save the new password.

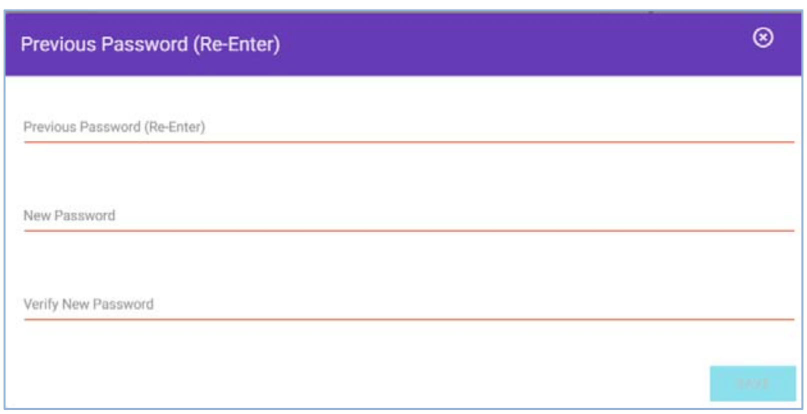


Figure 22: Change Password Dialog

5.3.2 Changing Security Question(s)

You have the ability to change your security question by clicking on the Change Security Question option under User Settings on the Administration screen.

- To change your questions or answers, select the question, enter the answer, and verify by entering the answer again.
- Click  to save the new question/answer.
- Click the arrows to toggle to any other questions/answers that have been set up.

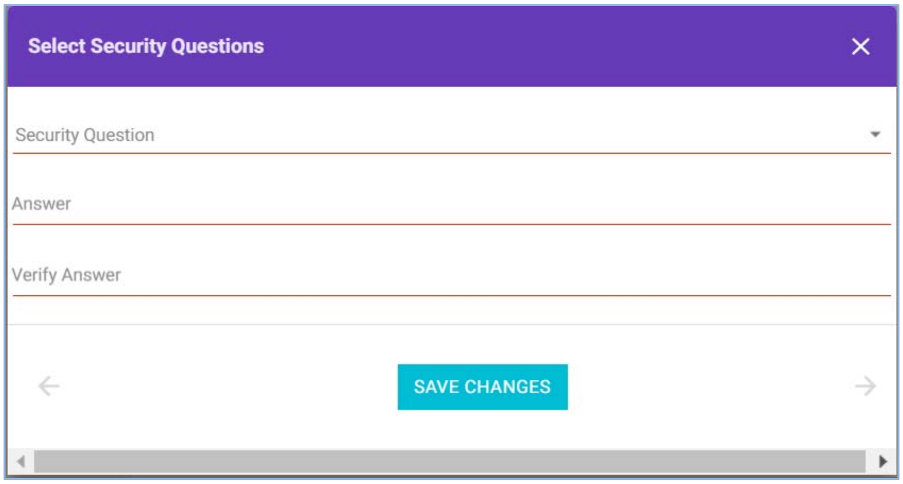


Figure 23: Change Security Question Dialog

5.3.3 Filer Details

Basic filer information, such as name, address, phone, and email is shown in the Filer Detail Panel located on the top right side of the Administration Screen.

Clicking the icon in the header above the panel will display/hide the panel.

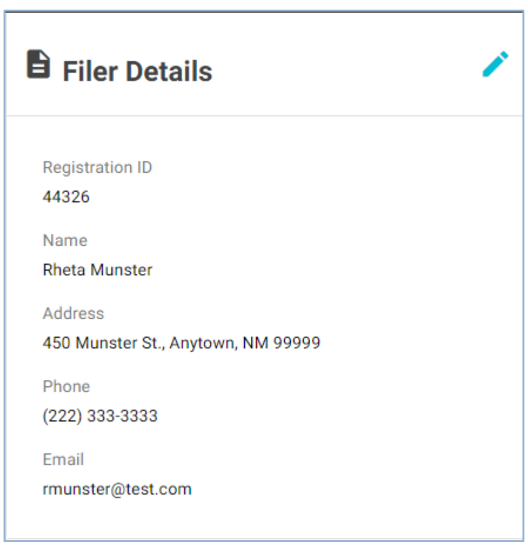


Figure 24: Filer Details Panel

5.3.4 Amending Your Registration

To amend your registration, click the icon at the top of the Filer Details panel. The Amend Financial Disclosure Statement Filer Registration screen will be displayed populated with registration information. Make the necessary changes.

Click AMEND to save the registration changes. These changes will be reflected on your Financial Disclosure Statement.

> Note: If you need to change or add to your reason for filing, you must amend your registration.

6 Public Site for Financial Disclosure Statements

6.1 Overview

The public site is accessible to anyone; no login credentials are needed. On this site, the public user can search for and view information about all Financial Disclosure Statement filers and their reports.

6.1.1 Getting there and back

If you have login credentials for the system, you may go into the public site and return to your dashboard, and go back and forth, without continually logging in and out.

- If you are logged in, click *Public Site* on the Dashboard Navigational Menu.
- You will be transferred to the public site.
- In the public site, if you have gone there while being logged into your dashboard, you will see a *Home* link in the Public Site Action Menu. Click this link to be returned to your workspace.
- As long as you stay logged in, you may use these two links to go back and forth.
- Once you log out, you can access the public site anytime, but you cannot get back to your dashboard without logging in again.

6.2 Available Public Functionality

6.2.1 Explore Financial Disclosure Statement Filers

Explores are a way to look at general lists of information. Explore Financial Disclosure Statement Filers displays a list of all filers who have filed a Financial Disclosure Statement along with why the statement was filed. This list can be made more specific by using the available filters. Clicking the name of an individual filer opens a detail screen for that filer which includes a filer registration date and a list of all Financial Disclosure Statements submitted by that filer. If a statement is filed, a PDF of it can be viewed.

Clicking on the Download Icon will download the list of filers in the result set in a .csv format.

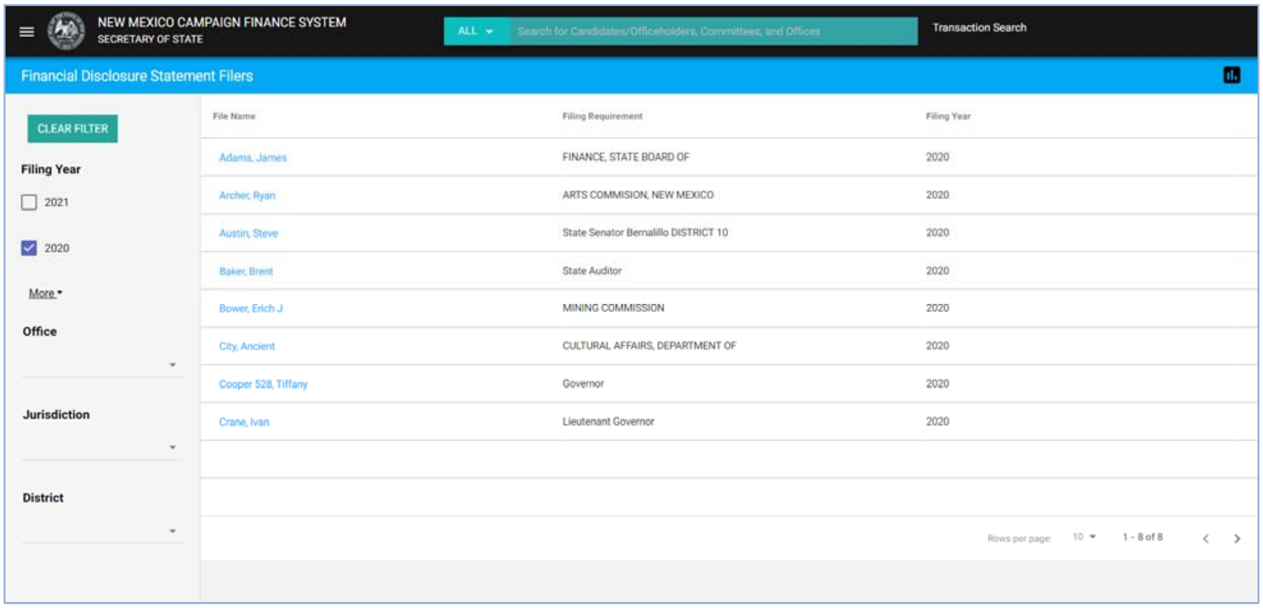


Figure 25: Explore Financial Disclosure Statement Filers

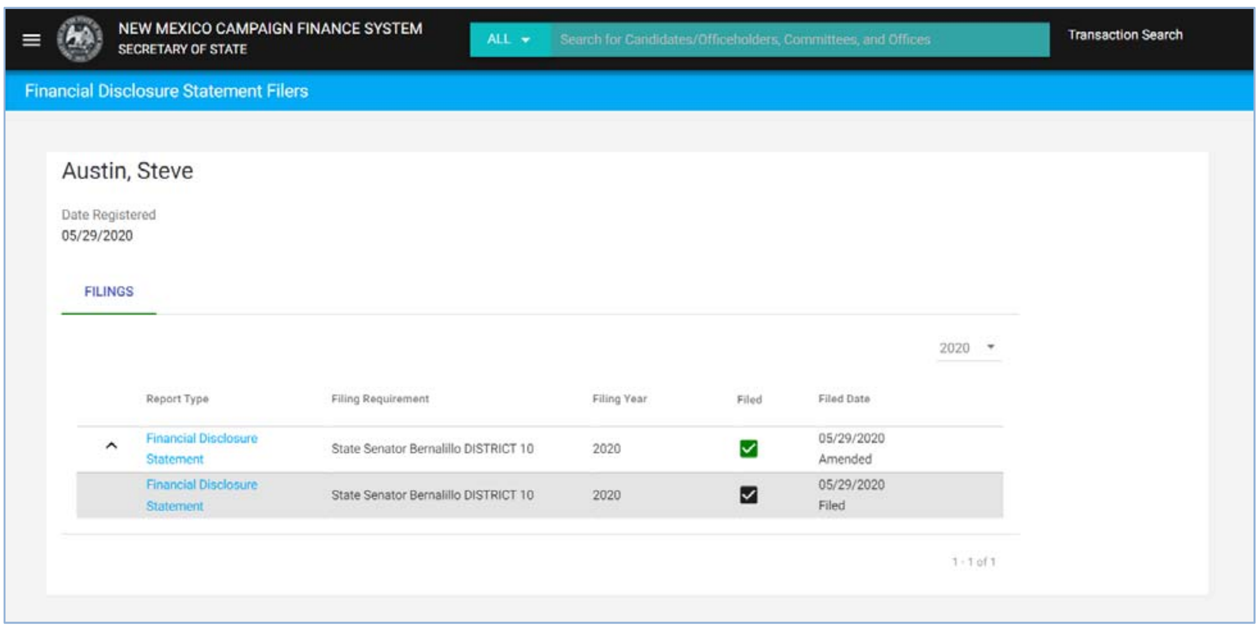


Figure 26: The View Detail screen of the Financial Disclosure Statement Filer

6.2.2 Financial Disclosure Statements

Filed Financial Disclosure Statements can also be accessed by clicking on the Explore Reports option on the public site navigational menu. Like the *Explore Financial Disclosure Statement Filers* functionality, there are filters available so that the group of reports shown in the list can be made more specific.

Note: Only filed Financial Disclosure Statements will be visible.

Clicking on the statement name will display the filed Financial Disclosure Statement in a pdf format. Filer information is redacted for filer privacy. Clicking on the filer name will allow you to drill down to the View Details screen for the Financial Disclosure Statement Filer where all previously filed Financial Disclosure Statements can be viewed.

Clicking on the Additional Columns will allow you to customize the information displayed in your result set. Certain columns can be hidden or displayed based on your data needs.

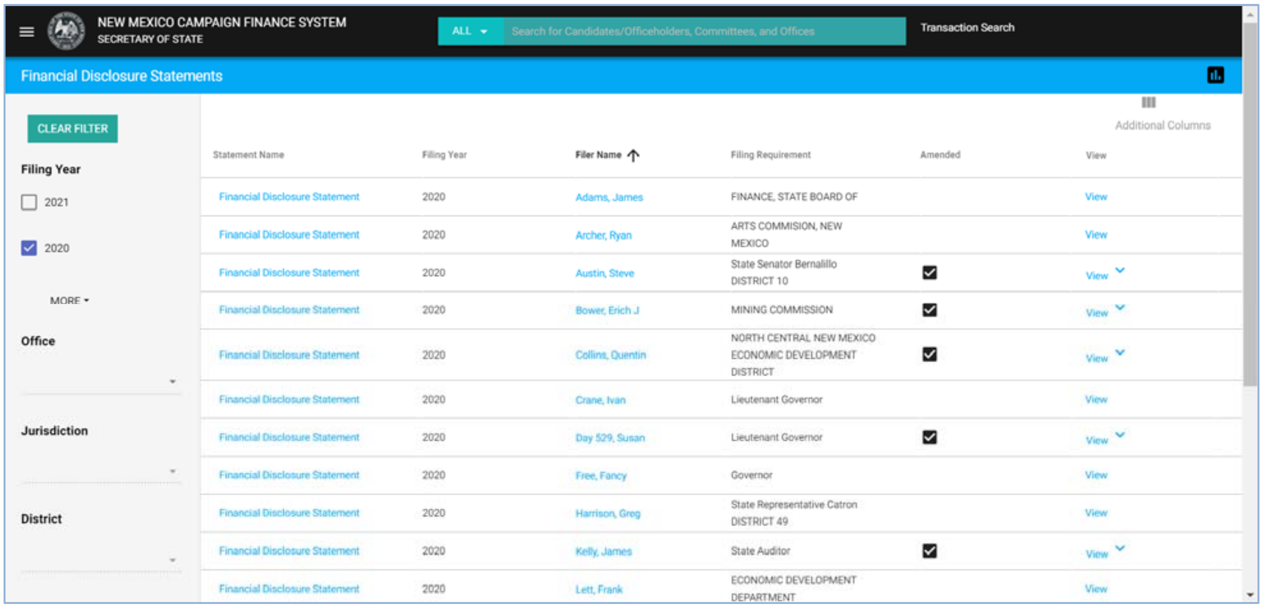


Figure 27: Explore Financial Disclosure Statements

6.2.3 Searches

Searches are intended to zero in on specific filers, more quickly than you may be able to get there using the Explores. For example, you may be looking for a specific filer. It is faster to get to what you need by doing a specific search rather than using the Explores. This can be accomplished from the search bar on the public site heading.

You can search across all reporting entities or you can select a specific type of reporting entity, for example, Financial Disclosure Statement Filer. As you type in the filer's name, the search results will be narrowed down based on your typing. Quick Results will display the first three matches.

Clicking **SEE ALL RESULTS** will display a list of filers who match the entered search criteria. Clicking on a specific filer will take you to the View Detail screen for that filer.

Note: Entering a % into the search bar will bring back all results.

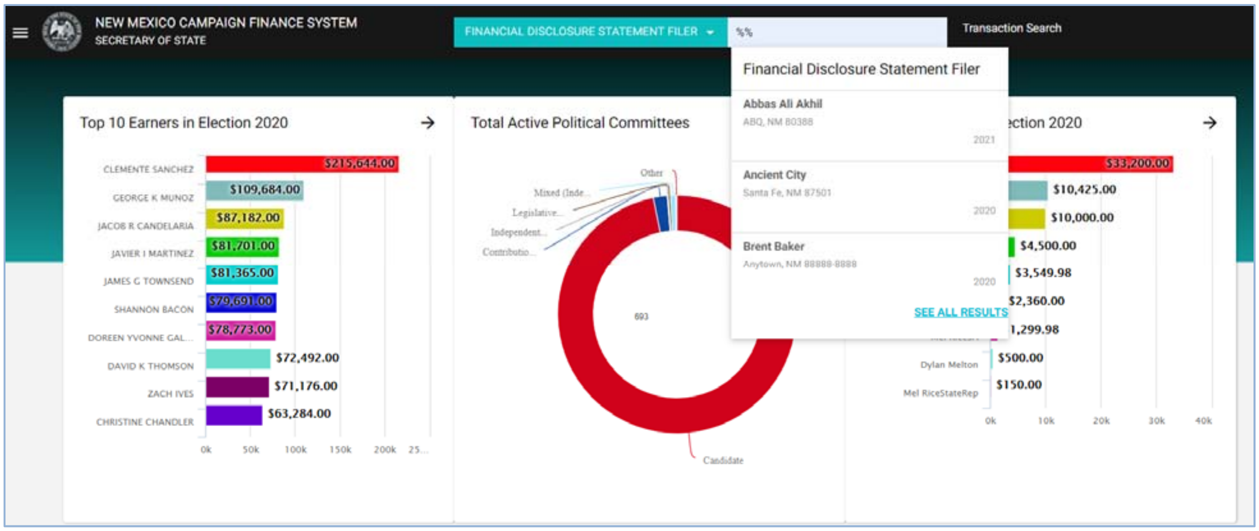


Figure 28: Entity Search Bar with Quick Results