eCampaign™
Filer’s Guide
For CAL Access Filers
Version 2.18.0108

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2 Introduction

2.1 Welcome to eCampaign™

Welcome to SouthTech Systems’ eCampaign™, your electronic solution for streamlining the filing and submission of FPPC Forms 460, 410, 496 & 497.

California’s Political Reform Act (the “Act”) requires receipts and expenditures in election campaigns to be fully and truthfully disclosed. Since 1974, there have been over 200 amendments to the Act’s Campaign Disclosure provisions. This manual has been prepared to assist candidates and primarily formed committees to comply with the Act’s numerous and often-detailed rules. It is written in a “user friendly” format so that candidates and committees, especially those with small budgets, have a resource guide. It is organized by subject matter and addresses the most common issues of campaign disclosure for local elections.

With eCampaign™, you can file your Disclosure Forms, electronically, 24/7, in the privacy of your own secured filing area. This eCampaign™ Filer’s Guide walks you, as a Filer, through the following processes:

- Securely filing and submitting an FPPC Form 460 to your filing officer/official
- Importing information from your CAL Access file
- Easily amending prior forms
- Quickly copying information from prior years’ forms
2.2 Defining “Campaign Disclosure”

(Source: http://codes.lp.findlaw.com/cacode/GOV/1/9/4.6/s84601#sthash.G4fr4gCp.dpuf)

The people of California enacted one of the nation’s most comprehensive campaign and lobbying financial disclosure laws when they voted for Proposition 9, the Political Reform Act of 1974. Public access to campaign disclosure information is a vital and integral component of a fully informed electorate. In accordance with the Online Disclosure Act, once all state-mandated development, procurement, and oversight requirements have been met, the Secretary of State must accept reports online or electronically. Advances in technology have made it viable for disclosure statements and reports required by the Political Reform Act to be filed online and placed on the Internet, thereby maximizing availability to the public.

These include disclosure of the following:

- Contributions Received
- Expenditures Made
- Current Cash Statement
- Outstanding Debts
- Cash Equivalents

Campaign Disclosure is made on a form called a “Recipient Committee Campaign Statement” (Form 460). The form must be filed twice or more with pre-election requirements each year the committee is active. Filed forms are public documents that must be made available to anyone them.

2.3 Individuals Subject to Filing

(Source: Form 460 Recipient Committee Campaign Statement)

- Candidate/Officeholder Controlled Committees
- Ballot Measure Committees
- Primarily Formed Candidates/Officeholder Committees
- General Purpose Committees

2.4 Filing Schedules

To view State and Local filing schedules for the current year, please visit the FPPC website here.
2.5 About SouthTech Systems, Inc.

SouthTech Systems is a software development and system integration firm with offices in Riverside, California. We specialize in custom turnkey business government solutions, as well as software development for public agencies and the private sector.

Our company’s focus is to equip public agencies with cost-effective and scalable applications that utilize database, digitized documents, workflow and electronic document management technologies. We provide the analysis, design, implementation, training, support and maintenance of enterprise-wide systems. Our solutions automate manual processes and improve staff productivity. As a premier software solution provider, we create, deploy, support, and maintain high-quality client-server and browser-based software solutions.

SouthTech Systems, Inc. offers not only the necessary technical knowledge, but also the in-depth government operational experience to make our software solutions a success. We understand how your business works, and we can blend cost-effective new technology with day-to-day operations to make your jobs easier and to provide you with an efficient workflow.

Our software products are specifically designed to meet the needs of government offices including County Recorders, County Clerks, Clerk of the Board of Supervisors, Election Officials and City Clerks. Each of our systems is designed to be highly configurable and completely turnkey, so that they meet the immediate, individual needs of our clients and their respective agencies.

2.5.1 CampaignDocs™ and eCampaign™ Development History

In partnership with the county of Ventura, SouthTech Systems developed the first generation of DisclosureDocs™ in 2000, the company’s flagship product for managing the business process of the FPPC-mandated Conflict of Interest Code / Form 700. Since 2000, multiple California counties have acquired DisclosureDocs™. SouthTech Systems has since become an expert in the field of developing software solutions that facilitate the submission of Conflict of Interest filings.

In 2006, the County of Orange had a vision that all county Conflict of Interest filers would have the ability to electronically submit Conflict of Interest Form 700. SouthTech Systems, in turn, redeveloped DisclosureDocs™ and created eCampaign™ to support the electronic submission process.

Now, SouthTech Systems has over 80,000 filers and continues to build as the electronic filing becomes more prominent.
2.6 Contact / Support Information

Should you have any questions about our system, please contact your filing officer.

2.7 About the Documentation

The eCampaign™ Filer’s Guide includes the following documentation:

- Detailed descriptions of eCampaign™ features for Filers
- eCampaign™ basic operation for Filers with step-by-step tutorials

2.8 Useful Links

1. [http://www.fppc.ca.gov/Act/2012_Index.pdf](http://www.fppc.ca.gov/Act/2012_Index.pdf)
2. [http://fppc.ca.gov/forms/700-12-13/Form700-12-13.pdf](http://fppc.ca.gov/forms/700-12-13/Form700-12-13.pdf)
4. [http://www.fppc.ca.gov](http://www.fppc.ca.gov)
5. [http://www.sos.ca.gov](http://www.sos.ca.gov)
3 Getting Started

3.1 Filer Access to eCampaign™

As a Filer, you will be granted account access to eCampaign™ by your Filing Officer. Once your account has been successfully created, you’ll receive an automated email from your Filing Officer. It will be a new account notification which will provide your eCampaign™ username and password.

Figure 1: Sample New Account Notification Email
3.2 Logging into eCampaign™

3.2.1 System Link

Once your Filer’s account has been activated, first, ensure that you are on an internet-connected computer. Then, click the system link that was included in your new account notification email.

Note: your agency’s link will replace the red highlighted link below.

![Figure 2: Click Your System Link](https://www.southtechhosting.com/CampaignDocsBeta/eCampaign)
3.2.2 **eCampaign™ Website**

A new web browser window will open and you will be automatically directed to the eCampaign™ Website.

*Note*: your welcome screen and notifications will vary based on your eCampaign™ administrator.

![Sample eCampaign™ Website](image-url)

Figure 3: Sample eCampaign™ Website
3.2.3 Login ID & Password

Enter the Login ID and Password that appears in your new account notification email. Depending on your organization, you may also need to input a unique security code that appears on the login page. After you have entered this information, click the Log In button.

![Login Screen]

3.2.3.1 First Login

If this is your first time logging in after your new account has been created, you will need to create a new password. Please follow the security-requirement rules on the password creation page. You will also be asked to select and answer a security question (if password is forgotten).

![Password Creation Screen]
3.2.3.2 Forgot Password/Login ID

If you have forgotten or lost your password, click on the Forgot Password? button. You will be asked to provide your Login ID, last name, security question and security answer (if you do not know or have not set up your security question and answer, please contact your Filing Officer for assistance). Once you submit your password request, the system will automatically generate, encrypt and send you a new password. Neither SouthTech Systems nor your Filing Officer will see your password.

Figure 6: Forgot Password Name Prompt

Figure 7: Forgot Password Security Prompt
If you have forgotten or lost your Login ID, click on the Forgot Login ID button. You will be asked to provide your last name, email address, security question and security answer (if you do not know or have not set up your security question and answer, please contact your Filing Officer for assistance). Once you submit your request, the system will email you your Login ID.

![Figure 8: Forgot Login ID Prompt](image)

Should you need assistance during the login process, you may click the Department/Agency Contact list link to view contact information for your organization.

![Figure 9: Registrar of Voters](image)
3.3 Navigating eCampaign™

After logging into eCampaign™, you can navigate through the system using the menu options on the left side of the page.

![Navigation/Menu Options]

Figure 10: Navigation/Menu Options

*Please refer to the next section for detailed information on each navigation menu option.*
4 The Login Menu

4.1 Login Menu Options

The Login Menu appears after you have logged into eCampaign™ and contains the following options:

- **Home** – Information/Announcements from your Department or Agency
- **Change Password** – Update your account with a new password
- **Change Login ID** – Update your account with a new login ID / username
- **Sign Out** – Sign Out of your eCampaign™ account

![Login Menu](image)

Figure 11: The Login Menu

4.2 Home

This page looks similar to your login page. It contains the same information and announcements from your Department or Agency, however, because you are already logged in, you will not see the Login box on the left side of the page.

![Home Page](image)

Figure 12: The Home Page
4.3 Change Password

To change your password, input your old password and your new password twice. Your new password must follow the security-rules indicated on the password-reset page.

![Figure 13: Change Your Password]

4.4 Change Login ID

To change your Login ID, input your password and your new Login ID.

![Figure 14: Change Your Login ID]
5 Filer Profile Menu

The *View/Edit Profile* module is where the Filer goes to view or edit committee information or committee personnel information:

![Filer Profile Menu Item](image)

Figure 15: *View/Edit Profile* Menu Item

When first selecting *View/Edit Profile*, the main screen will appear. When information contained in the committee’s profile changes, an amendment must be filed within 10 days of the change with the Secretary of State and local filing officer. During the period 16 days before an election, an amendment must be filed within 24 hours.

*Note: this information is not editable until the* [Edit] button has been clicked.

![Main Screen](image)

Figure 16: *View/Edit Profile* Main Screen
5.1.1 Navigating the Profiles

To navigate to a different profile screen, use the Profile Navigation Bar. Simply click on the name of the profile that you want to view or edit:

![Navigation Bar]

If a committee is sponsored, a new tab titled “Sponsored” will be available:

![Navigation Bar with Sponsored Tab]
5.1.2 Filer Profile

Persons (including an officeholder or candidate), organizations, groups, or other entities that raise contributions from others totaling $2,000 or more in a calendar year to spend on California elections qualify as a recipient committee. (Source: FPPC Form 410)

This profile contains information concerning:

- Filer/Committee's Type, State ID and Date Qualified (See next section for Committee Naming Requirements)
- Street and Mailing Address
- County and Jurisdiction

To edit this profile, click the **Edit** button.

To save this profile, click the **Save** button.

To cancel and go back to the view-only screen, click the **Cancel** button.
5.1.2.1 Committee Name Requirements

(Source: FPPC Form 410)

Candidate Controlled Committees (including ballot measure committees): Any committee that is controlled by a state or local candidate or officeholder must include the last name of the candidate in the name of the committee. In addition, the following rules also apply:

- An election committee controlled by one or more state or local candidates must also include the office the candidate(s) is seeking and the year of the election (e.g., Friends of Smith for Assembly 20XX, Jones for Council 20XX).
- An officeholder committee set up by a state officeholder must also include the office held, the year the officeholder was elected to the current term of office, and the words “Officeholder Account,” as part of the committee name (e.g., Nguyen Assembly 20XX Officeholder Account).
- A legal defense fund set up by a state or local candidate or officeholder must also include the words “Legal Defense Fund” as part of the committee name (e.g., Senator Smith Legal Defense Fund).
- A ballot measure committee controlled by one or more state candidates must also state that it is a ballot measure committee (e.g., Senator Lee’s Ballot Measure Committee). See additional requirements for primarily formed committees.

Sponsored Committees: A sponsored committee (including most political action committees) must include the full name of its sponsor in the committee’s name. If the committee has more than one sponsor and the sponsors are members of an industry or other identifiable group, include a term identifying that industry or group.

Primarily Formed Committees

Ballot Measures: The name of each committee primarily formed to support or oppose a ballot measure must include:

- A statement identifying the ballot measure(s) number or letter and whether it supports or opposes the measure(s) (e.g., Committee For Proposition/Measure __ or Committee Against Proposition/Measure __).
- The name must include the economic or other special interests of its major donors of $50,000 or more, in descending order based on the amount contributed to the committee. The list of these economic or special interests may not be interspersed with constituencies such as “concerned citizens, or consumers.”
- Prior to the designation of the ballot measure number, a primarily formed ballot measure committee controlled by a state candidate must also state that it is a ballot measure committee (e.g., Senator Gomez’s Ballot Measure Committee).

Recalls: Each committee established for a recall election must include the name of the officeholder subject to the recall. If the committee is not controlled by the officeholder, the committee must state its support or opposition (e.g., Committee Opposing the Recall of Council Member Doe).

Supporting or Opposing a Candidate: The name of each committee primarily formed to support or oppose a state or local candidate(s) being voted on in a single election, other than a recall election, must include the name of each candidate, the office sought, the year of the election and must state whether the committee supports or opposes the candidate(s) (e.g., Committee to Support Doe for Senate 20XX).
5.1.3 Treasurer Profile

The committee may have only one treasurer and one assistant treasurer. A candidate may be his or her own treasurer or assistant treasurer. A committee may not accept a contribution or make an expenditure without a treasurer. (Source: FPPC Form 410)

This profile contains information concerning:

- Treasurer's Full Name
- Treasurer's Address & Contact Information

To gain editing access to this profile, click the button and the screen will show as follows:

![Figure 20: Treasurer Profile Screen]

To edit this profile, click the button.

To save this profile, click the button.

To cancel and go back to the view-only screen, click the button.
### 5.1.4 Assistant Treasurer Profile

The committee may have only one treasurer and one assistant treasurer. A candidate may be his or her own treasurer or assistant treasurer. A committee may not accept a contribution or make an expenditure without a treasurer. (Source: FPPC Form 410)

This profile contains information concerning:

- Assistant Treasurer’s Full Name
- Assistant Treasurer’s Address & Contact Information

To gain editing access to this profile, click the **Edit** button and the screen will show as follows:

![Assistant Treasurer Profile Screen](image)

Figure 21: Assistant Treasurer Profile Screen

To edit this profile, click the **Edit** button.

To save this profile, click the **Save** button.

To cancel and go back to the view-only screen, click the **Cancel** button.
5.1.5 Principal Officer Profile

A committee that is not controlled by a candidate or officeholder must disclose the name, street address, and telephone number of the committee’s principal officer(s). The principal officer(s) of a committee are the individual(s) primarily responsible for approving the political activity of the committee, including authorizing the content of committee communications, authorizing the committee’s contributions and other expenditures, and determining the committee’s campaign strategy. If no individual other than the committee treasurer qualifies as a principal officer, identify that individual as both the treasurer and the principal officer. An attachment may be necessary. (Source: Form 410)

This profile contains information concerning:

- Principal Officer’s Full Name
- Principal Officer’s Address & Contact Information

To gain editing access to this profile, click the button and the screen will show as follows:

![Figure 22: Principal Officer Profile Screen](image)

To edit this profile, click the button.

To save this profile, click the button.

To cancel and go back to the view-only screen, click the button.
5.1.6 Sponsor Profile

A sponsored committee is one that has a sponsor—a business entity, organization, union, or other entity—that meets certain criteria. Sponsored ballot measure committees and general purpose committees must include the name of the sponsor in the name of the committee. (Source: Form 410)

This profile contains information concerning:

- Sponsor’s Full Name
- Sponsor’s Address & Contact Information
- Sponsor’s Industry or Group Affiliation

To gain editing access to this profile, click the **Edit** button and the screen will show as follows:

![Sponsor Profile Screen](image)

To edit this profile, click the **Edit** button.

To save this profile, click the **Save** button.

To cancel and go back to the view-only screen, click the **Cancel** button.
6 Filings Menu

The CAL Access Filings Menu provides the User with the ability to upload information that their Treasurers provided them from 3rd party software. This uploaded information will allow you to successfully file your statements electronically via SouthTech Systems.

![Filings Menu](image1)

Figure 24: Filings Menu

When first selecting the Start Filing menu item, the main screen will appear.

![Start Filing Main Screen](image2)

Figure 25: Start Filing Main Screen
6.1 Start Filing/Uploading a Form

To upload a Form CAL Access file, click **Browse...** and your computer’s file browser will open.

Select the CAL file you wish to upload and click **Open**.

To remove this file, click the **X** at the end of the line.

To continue the upload process, click the **Upload** button.
Before uploading, you will be prompted:

![File Import Prompt]

To continue uploading, click **Yes**.

To cancel upload process and go back, click **No**.

During the upload, a progress bar will appear:

![Progress Bar]

When the file has been successfully uploaded, you will receive this prompt:

![Upload Successful Prompt]
6.1.1 Additional Screen - Conflicting Information

If the CAL file you've uploaded contains conflicting information, you will receive a warning screen. The system uploads the information exactly how it appears in the CAL file.

In this instance, the Assistant, Candidate, Filer, and Treasurer conflict with my current Filing settings because I have used a test CAL file that is for John Doe, rather than Natalie Dominguez for Sheriff 2014.

The prompt will give you two options:

1. Overwrite filer information and continue import (if this is selected, the conflicting information that is already in the system will be replaced with the information from the CAL file).

2. Press the [Cancel] button and do not continue uploading the CAL file.

---

Figure 31: Conflicting Information Screen

Select [Continue with filing. Attention: You might need to file an amendment.] and click [Continue] to finish importing the CAL file.
6.1.2 Additional Screen - Statements & Dates

The Type of Statement line, Start & End Date lines, as well as the Election Date line will be pre-selected and fixed.

If the information from the CAL file does not match the Filing Officer’s records, the Filer will be prompted to select a statement period from the Filing Officer’s records to link the CAL file to.

**Note:** if the Filer has custom filing periods in CampaignDocs, the linked filing periods in eCampaign will reflect those custom filing periods for that Filer.

For instance, if the last form this Filer filed was on 10/22/16, the “Filing Period Covered” that the Filer will link their filing to when uploading a CAL file will reflect the custom filing period beginning a day after their last filing (10/23/16), rather than the default filing periods.

![Figure 32: Link Statement Period Screen](image)

Once a statement period has been selected, click the Select and Continue button to continue with the import.
6.2 Digital Signatures, Verification, and Signature Routing

SouthTech Systems has created a form of Signature Verification that allows Candidates/Treasurers/etc. to login to the eCampaign™ application with a unique Login ID created by your Filing Officer and electronically sign and submit your Form.

Note: some Agencies may still require a paper filing with a wet signature. If you are unsure, please contact your filing officer.

The Digital Signature and Verification section of this Filer’s Guide is created using the Form 460 as an example because it is the most commonly used Form among our Filers. To see a list of ALL Forms and how to file them, please see the Available Forms and e-Filing Requirements section of the Manual.

6.2.1 Signing a Form 460 or 450

These Forms require two digital signatures from either the Treasurer or Treasurer Assistant, and either the Officeholder, Candidate or Principal Officer.

<table>
<thead>
<tr>
<th>Recipient Committee Campaign Statement, Form 460</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Filing Information</strong></td>
</tr>
<tr>
<td>Type of Statement:     Semi-annual</td>
</tr>
<tr>
<td>Start Date:           4/24/2016</td>
</tr>
<tr>
<td>End Date:             6/30/2016</td>
</tr>
<tr>
<td>Election Date:         (Blank)</td>
</tr>
<tr>
<td><strong>Cash Equivalents</strong></td>
</tr>
<tr>
<td>Amount:              0.00</td>
</tr>
</tbody>
</table>

*The amount displayed reflects the amount you've entered as Loans Made. If you have other investments or real property that should be added to this amount, please adjust the amount shown to include them.*

By signing this document, I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I have used all reasonable diligence in preparing this statement.

<table>
<thead>
<tr>
<th>Signers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Treasurer or Assistant Treasurer</strong></td>
</tr>
<tr>
<td>Name: (Blank)</td>
</tr>
<tr>
<td>Date: (Blank)</td>
</tr>
<tr>
<td><strong>Officeholder, Candidate or Principal Officer</strong></td>
</tr>
<tr>
<td>Name: Natalie Kent</td>
</tr>
<tr>
<td>Date: 6/2/2017</td>
</tr>
</tbody>
</table>

[Also Sign as Treasurer / Tr. Assistant]

Figure 33: Additional Filings Drop-Down Menu
6.2.1.1 Filing Information

The “Filing Information” box contains pre-determined information such as:

- **Type of Statement:** this refers to the statement type (e.g. Pre-Election, Semi-Annual, and
- **State Date:** the start date of the Form’s “Period Covered”
- **End Date:** the end dates of the Form’s “Period Covered”
- **Election Date:** the date of the election the filing is linked to

6.2.1.2 Cash Equivalents

The Cash Equivalents section ONLY appears in the Signature Verification for the Form 460, and reflects the cumulative amounts you’ve entered as loans made, investments, or real property. The amount will populate automatically, but it editable.

---

**Figure 34: Filing Information Section**

**Figure 35: Cash Equivalents Section**
6.2.1.3 Signers

The Default Settings for *Electronic Signature Routing* allows only the filer currently logged in to sign the statement.

The *Signers* and *Dates* lines are fixed to the current filer signing and current date of the statement being filed.

For example:

![Figure 36: ESR Default Settings for Digital Signatures](image_url)
- If the Candidate logs in with his/her eCampaign™ login ID/password and starts filing a statement, their full name (editable in the Filer Profile) and “today’s date” will appear in the Officeholder, Candidate, or Principal Officer line. (See photo example below)

![Example of Candidate’s Signature](image1.png)

**Figure 37: Example of Candidate’s Signature**

- If the Treasurer logs in with his/her eCampaign™ login ID/password and starts filing a statement, their full name (editable in the Filer Profile) and “today’s date” will appear in the Treasurer or Assistant Treasurer line.

![Example of Treasurer’s Signature](image2.png)

**Figure 38: Example of Treasurer’s Signature**
6.2.1.3.1 Sign as Candidate/Officeholder AND Treasurer/Assistant Treasurer

If the Filer is registered in CampaignDocs™ as both the Candidate/Officeholder and the Treasurer/Assistant Treasurer, the Filer will not have to log out and back in under a separate Login ID. Instead, a checkbox will appear below the signature lines.

![Figure 39: “Also Sign As” Checkbox](image)

When the Checkbox is selected, the Filer’s signature will be duplicated in the other available signature line.

![Figure 40: Multiple Signatures](image)

**Note:** this option will ONLY be available when the Candidate/Officeholder and Treasurer/Assistant Treasurer are registered under the same name in CampaignDocs™.
6.2.1.3.2 "Allow to Set Sign Date" Enabled

When this option is enabled by your Filing Officer, the Date line for only the current filer's signature will become available to change.

![Figure 41: "Allow to Set Sign Date" Option Enabled](image)

6.2.1.3.3 "Allow to Choose Candidate" Enabled

When this option is enabled by your Filing Officer, the Name line for only the Officeholder, Candidate or Principal Officer will become available to change.

If the filer logged in is the Treasurer or Assistant Treasurer, this option will not be available to the filer, even if the option is enabled in CampaignDocs™.

![Figure 42: "Allow to Choose Candidate" Option Enabled](image)
6.3 Pending Mode

The Pending module only appears when Signature Routing is turned on and an additional signature is required.

When first selecting the Pending module, the main screen will appear. There will always be a filing present whenever the Pending module is present. If there is no filing in Pending mode, the module will be hidden.

For the purpose of this Filer’s Guide, we will be using a Filer example “Sample Committee 2016,” who will file two pre-elections and two semi-annual statements per year.

NOTE: NOT ALL OF THESE OPTIONS MAY BE AVAILABLE TO YOU, DEPENDING ON YOUR FILING OFFICER’S PREFERENCES.
6.3.1 Signature Options

When a filing has gone into Pending mode, the system will send an email to the other available parties for which a signature is needed, and the current filer will be redirected to the Pending module.

From here, the current filer will have the options to:

- **Edit Signature Data** (may not be available for every filer): This option allows the filer to change their signature data (signer or date).

- **Cancel Signature** (may not be available to every filer): This option allows the filer to cancel their own signature, and subsequently (if this is the only signature), the entire filing.

- **Cancel Entire Filing** (may not be available to every filer): Cancel the filing and send the filing back to the Start Filing module.

![Figure 45: Pending Main Screen](image-url)
6.3.1.1 Edit Signature Data

If the “Allow to Choose Candidate” and/or “Allow to Change Date” option(s) are enabled, when a Candidate, Officeholder, or Principal Officer has logged in, the filer can choose to Edit Signature Data.

When the button is selected, this pop-up module will open where one may edit the signature data according to which options are available:

![Edit Signature Data](image)

Figure 46: Edit Signature Date Pop-Up

6.3.1.2 Cancel Signature

To cancel your own signature, select and this verification will pop-up:

![Cancel Signature](image)

Figure 47: Cancel Signature Warning

Select Yes to remove your signature and you will be redirected to the Start Filing module.

Select No to cancel and go back to the previous screen.
6.3.1.3 Cancel Entire Filing

To cancel the entire filing, select Cancel Entire Filing and this warning will pop-up:

![Figure 48: Cancel Entire Filing]

Select Yes to cancel the entire filing.

Select No to cancel and go back to the previous screen.
6.3.2 Adding the 2nd Required Signature

When a filing has gone into Pending mode, the system will send an email to the other available parties for which a signature is needed. The other parties must have a valid eCampaign™ login ID for an email to be sent. Once the other party has a valid eCampaign™ login ID, they will be immediately directed to the Pending module.

To begin, select the statement in Pending mode and buttons will appear. You will have the options to:

- **Continue Filing**: Continue to add the signature and file the statement.

- **Cancel Entire Filing** (may not be available to every filer): Cancel the filing and send the filing back to the Start Filing module.

Figure 49: Pending Options
To add your signature and continue with the filing, select **Continue**.

When this option is selected, the Digital Signatures module will pop-up. The *Filing Information*, *Cash Equivalents*, *Signature* and *Date* lines will all be fixed.

![Figure 50: Add Signature](image)

Select **Continue** to continue with the filing.

Select **Cancel** to cancel the filing process and go back to the *Pending* screen.

To continue the step-by-step process, please continue to the *Finalizing Your Form* section.
6.4 Finalizing Your Form

When the form type has been selected, digital signatures signed, and the form has been rendered, the form should be generated in a pop-up Module, like so:

![Sample Form 460 Rendering](image)

**Figure 51: Sample Form 460 Rendering**

### 6.4.1.1 Preview Navigation

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Toggle between maximized view and restore down.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Display the Search Window</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Print</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Print Current Page</td>
</tr>
</tbody>
</table>

**Figure 52: Statement Rendering Navigation Pane**
<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skip to First/Last Page</td>
</tr>
<tr>
<td>Previous/Next Page</td>
</tr>
<tr>
<td>Navigation by Page Number</td>
</tr>
<tr>
<td>Save</td>
</tr>
<tr>
<td>Save Document Type</td>
</tr>
<tr>
<td>Exit</td>
</tr>
<tr>
<td>Finalize Form</td>
</tr>
<tr>
<td>Finalize Form/File Statement</td>
</tr>
</tbody>
</table>
6.4.1.2 Preview Mode

The rendered Statement will appear in a pop-up module that you can zoom in and out of, viewing the entire statement:

![Preview Pop-Up Module](image-url)

Figure 53: Preview Pop-Up Module
6.4.1.2.1 Toggle Mode

By clicking the toggle button, the Filer can switch between the full screen view and the in-application view.

Figure 54: Preview In-Application View
6.4.1.3 Finalizing the Form

After reviewing the Form to make sure you’ve entered all the appropriate information, click on the **Finalize Form** button in the upper right-hand corner:

![Figure 55: Finalize Form Button](image)

After clicking the **Finalize Form** button, you will be prompted with this warning:

![Figure 56: Finalize Warning](image)

Click **Yes** to continue and file your statement.

Click **No** to go back to the previous screen.
6.4.1.4 Options for Filing the Statement

To Submit the Filing, select Accept and continue with one of the following options. Depending on your eCampaign™ settings, you will see all or only some of these options:

- **eSign and Forward for Additional Signatures**: Sign the statement and put it into Pending mode until the other required party can sign and submit the form electronically. The eCampaign™ system will send an email to the other required party, but only if they have an appropriate login ID and email.

- **eSign and Electronically Submit to Filing Officer**: Sign and submit electronically to your filing officer with only one signature. When this option is selected, the filing will not go into Pending and will need an amendment filed when the second signature has been acquired.

- **File by Paper**: *This option will not file the Form electronically.* This option will print the Form with blank signature. Apply a wet signature and send the Form to your Filing Officer.

- **Don’t Submit**: Cancel the submission process and return to the previous page.

**Note:** not all of these options will be available for all Filers.

If your form has been successfully filed, you will receive this notice:
6.5 Previous Filings

The *Previous* module will be where the Filer goes to view previous filings.

![Previous Filings Menu Item](image)

Figure 59: Previous Filings Menu Item

When first selecting the *Previous* module, the main screen will appear.

![Previous Filings Main Screen](image)

Figure 60: Previous Filings Main Screen

The Filer can View, Amend, Save [PDF of Form] Locally, Download a CAL Access File, and Print [PDF of Form] with Blank Signature.

![Previous Due Date Filings Options](image)

Figure 61: Previous Due Date Filings Options

*Note: for Termination Statements and Organization Statements (Form 410), you can View, Save Locally, and Download a CAL Access File.*

![Previous Termination Statement & Organization Statement Options](image)

Figure 62: Previous Termination Statement & Organization Statement Options
6.5.1 Viewing a Statement

To view a statement, click the View button and a preview module will pop-up:

![View Previous Statement Module](https://www.southtechhosting.com/CampaignDocBeta/eCampaign/FilingsManagement/ShowForms.aspx?FID=328162014)

6.5.2 Save Locally

To save a copy of the statement, click the Save button and your .PDF download will begin automatically. Depending on your browser, the download will appear at the base of your screen or in a new browser.

![Sample Previous Statement .PDF Download](https://www.southtechhosting.com/CampaignDocBeta/eCampaign/FilingsManagement/ShowForms.aspx?FID=328162014)

In your computer’s Downloads folder (or default download folder), you will find your selected statement under the committee name and period date.

![Sample Previous Statement .PDF File](https://www.southtechhosting.com/CampaignDocBeta/eCampaign/FilingsManagement/ShowForms.aspx?FID=328162014)
6.5.3 Amending a Previously Filed Form

6.5.3.1 Form 460's

To amend a previously filed Form 460, select the appropriate Form and click on the Amend button. When Amend is selected, the Filer will be brought to the Import page.

Select the appropriate filing and select Upload to continue the amendment process.

Figure 66: Sample Upload Amendment

Fill out the applicable information for the signers. For a step-by-step tutorial, see Section 9.1.2.

When the preview module opens, make sure the Amendment section is checked and the information you entered is correct:

Figure 67: Type of Statement - Amendment
To amend a previously filed Form 496 or 497, select the appropriate Form and click on the amend button. When amend is selected, the Filer will be brought to the Import page.

Select the appropriate filing and select Upload to continue the amendment process.

Figure 68: Sample Upload Amendment

Note: no signer information is required for Form 496 or 497.

The Filer will be prompted to select the original form to link the amendment to. Once the original Form is selected, click Continue.

Figure 69: Sample Upload Amendment
When the preview module opens, make sure the Amendment section is checked and the information you entered is correct:

Figure 70: Type of Statement - Amendment
6.5.3.2.1 Finalizing the Amendment

After reviewing the Form to make sure you’ve entered all the appropriate information, click on the **Finalize Form** button in the upper right-hand corner:

![Finalize Form Button]

Figure 71: Finalize Form Button
After clicking the **Finalize Form** button, you will be prompted with this warning:

![Finalize Warning](image)

Figure 72: Finalize Warning

Click **Yes** to continue & file your statement.

Click **No** to go back to the previous screen.

### 6.5.3.2.2 Filing the Amendment

To Submit the Amendment, select *Accept* and continue with one of the filing options:

![Accepting Terms Agreement](image)

Figure 73: Accepting Terms Agreement

Click **Electronically Submit** to electronically file your statement.

Click **File by Paper** to print, sign, and mail your statement.

Click **Don't Submit** to return to the previous screen.
If your form has been successfully filed, you will receive this notice:

![Form Ready to Print]

Thank you. Your form has been finalized.

If you need to view, print or amend your filed form, a copy of your filing has been saved in your profile under "Previous Filings".

Figure 74: Finalized Statement Notice

### 6.5.3.3 Download a CAL Access File

To download a CAL Access file, click the button and your .CAL file download will begin automatically. Depending on your browser, the download will appear at the base of your screen or in a new browser.

![Download CAL Access File]

Figure 75: Sample Previous Statement .CAL Download

In your computer’s Downloads folder (or default download folder), you will find your selected statement under the committee name and period date.

![Sample Previous Statement .CAL File]

Figure 76: Sample Previous Statement .CAL File
6.5.3.4 Print with Blank Signature

To Print the previously filed Form with a blank signature section, click the [Print with Blank Signature] and a pop-up module will open:

Figure 77: Sample Blank Signature Section
If you wish to report questions/problems/bugs in our system, please report the issue and we will review your submission.

Should you have any questions about our system or the filing and submission process, please contact your Filing Officer, who will be more than happy to assist you.

7.1 Report an Issue

When Report an Issue has been selected, a pop-up module will open with options for reporting.
7.2 FPPC Hotline

When *FPPC Hotline* has been selected, a pop-up module will open with a PDF with information on how to contact the FPPC.

![Figure 80: Sample FPPC Hotline Document](image-url)
8 Help Menu

The Help menu item has been created specifically for the User’s convenience. This menu item, when selected, will open a pop-up module containing a PDF-form copy of the Filer’s Guide section in relation to that module.

Figure 81: Sample Help Menu Drop-Down

When any of the sections under the Help menu are selected, a pop-up module will appear with a PDF version of the Filer’s Guide that the User is able to view, print, or save.

Figure 82: Sample Help Section Pop-Up Document
### Available Forms and e-Filing

This is a list of available forms to file electronically with the eCampaign™ application:

<table>
<thead>
<tr>
<th>FPPC Campaign Disclosure Forms</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 501 (501-A) (Candidates, Officeholders, and Candidate Controlled Committees)</td>
<td>Candidate Intention Statement</td>
</tr>
<tr>
<td>Form 410 (410-A, 410-T) (Recipient Committees)</td>
<td>Statement of Organization Recipient Committee</td>
</tr>
<tr>
<td>Form 425 (425-A) (Recipient Committees except Candidate Controlled Committees)</td>
<td>Statement of No Activity</td>
</tr>
<tr>
<td>Form 450 (450-A) (Recipient Committees except Candidate Controlled Committees)</td>
<td>Recipient Committee Campaign Statement – Short Form</td>
</tr>
<tr>
<td>Form 460 (460-A, 460-T) (Recipient Committees)</td>
<td>Recipient Committee Campaign Statement</td>
</tr>
<tr>
<td>Form 496 (496-A) (Recipient Committees)</td>
<td>24-hour Independent Expenditure Report</td>
</tr>
<tr>
<td>Form 497 (467-A) (Recipient Committees)</td>
<td>24-hour Contribution Report</td>
</tr>
<tr>
<td>Form 462 (462-A) (Recipient Committees)</td>
<td>Verification of Independent Expenditures (Print Only)</td>
</tr>
<tr>
<td>Form 470 (470-A) (Candidates and Officeholders)</td>
<td>Officeholder and Candidate Campaign Statement - Short Form</td>
</tr>
<tr>
<td>Form 470-S (470-S-A) (Candidates and Officeholders)</td>
<td>Officeholder and Candidate Campaign Statement - Short Form - Supplement</td>
</tr>
</tbody>
</table>

To see detailed explanations and requirements for each form available for electronic submission, please see the Available Forms section of this Filer’s Guide.
9.1 Form 501: Candidate Intention Statement

The Form 501 is available for the following Filer Type:

Included in this Filer’s Guide:
- Candidate Controlled Committees if the Candidate plans to run for another election and redesignate their current committee.

Not Included in this Filer’s Guide:
- Candidates (without a controlled committee) - This is available in a separate manual.
- State Candidates (without a controlled committee) - This is available in a separate manual.

(Note: State Candidates have additional steps for this form. See below)

9.1.1 Signature Requirements

The Form 501 requires a signature from the Candidate and the Election Date that the 501 is being filed for.

![Signature Requirements](image-url)

Figure 83: Signature Requirements
9.1.2 Signature Requirements for STATE Candidates

The Form 501 for State Candidates requires the following information:

- An Election Date from a drop-down menu
- Accept/Deny the voluntary expenditure limit
- If they Candidate contributed personal funds in excess of the expenditure ceiling for the election stated above
- Candidate Signature

Figure 84: Signature Requirements for STATE Candidates
9.2 Forms 470: Officeholder and Candidate Campaign Statement Short Form

The Forms 470 are available for the following Filer Types:
- Candidates (without a controlled committee) who do not anticipate receiving or spending $2,000 or more during the calendar year.
- Officeholders (without a controlled committee) who do not anticipate receiving or spending $2,000 or more

9.2.1 Signature Requirements

The Form 470 asks Filer to enter an election date and requires a signature from the Officeholder or Candidate.

![Signature Requirements](image-url)
9.3 Forms 470-S: Officeholder and Candidate Campaign Statement Short Form Supplement

The Form 470-S are available for the following Filer Types:

- **Candidates** (without a controlled committee) who do not anticipate receiving or spending $2,000 or more during the calendar year.
- **Officeholders** (without a controlled committee) who do not anticipate receiving or spending $2,000 or more

### 9.3.1 Signature Requirements

The **Form 470-S** does not require a signature, but the Filer will be required to enter the election date as well as the date they breached the contributions/expenditure limit.

![Signature Requirements](image)

Figure 86: Signature Requirements
9.4 Form 410: Statement of Organization

The Form 410 is available for ALL Filer Types.

9.4.1 Signature Requirements

The Form 410 requires a signature from the Controlling Candidate/Officeholder or Principal Officer, and Treasurer or Treasurer Assistant. If the Candidate and Treasurer are the same person, they may sign twice by selecting the checkbox below.

Note: this option only becomes available if the same name is entered for both the Candidate and the Treasurer in CampaignDocs by the Filing Officer.

9.4.1.1.1 Termination Date Discrepancy

If there is a discrepancy with the Termination Date being entered for the 410-T and the previously filed 460-T, the Filer will be prompted to choose the correct date:

- Select Current: the Termination Date from the 460-T
- Select New: the Termination Date from the 410-T

Figure 87: 410-T Termination Date
9.5 Form 425: Semi-Annual Statement of No Activity

The Form 425 is available for the following Filer Type:
- Recipient Committees (except Candidate Controlled Committees)

9.5.1 Signature Requirements

The Form 425 requires a signature from the Treasurer or Treasurer Assistant. If the Candidate and Treasurer are the same person, they may sign as the Treasurer by selecting the checkbox below.

*Note:* this option only becomes available if the same name is entered for both the Candidate and the Treasurer in CampaignDocs by the Filing Officer.

---

**Image: Figure 88: Signature Requirements**

---

By clicking the CONTINUE button below, I understand that this action will serve as my electronic signature of agreement that all information in my campaign finance disclosure filing is true and accurate to the best of my knowledge and that by law this electronic signature will have the same effect as a signature on a paper form.

---

**Image: Figure 88: Signature Requirements**
9.6 Form 450: Recipient Committee Campaign Statement – Short Form

The Form 450 is available for the following Filer Type:
- Recipient Committees (except Candidate Controlled Committees)

9.6.1 Signature Requirements

The Form 450 requires a signature from the Controlling Candidate/Officeholder or Principal Officer, and Treasurer or Treasurer Assistant. If the Candidate and Treasurer are the same person, they may sign twice by selecting the checkbox below.

*Note:* this option only becomes available if the same name is entered for both the Candidate and the Treasurer in CampaignDocs by the Filing Officer.

![Signature Requirements](image)

**Figure 89: Signature Requirements**
9.7 Form 460: Recipient Committee Campaign Statement

The Form 460 is available for Recipient Committees.

9.7.1 Signature Requirements

The Form 460 requires a signature from the Controlling Candidate/Officeholder or Principal Officer, and Treasurer or Treasurer Assistant. If the Candidate and Treasurer are the same person, they may sign twice by selecting the checkbox below.

**Note:** this option only becomes available if the same name is entered for both the Candidate and the Treasurer in CampaignDocs by the Filing Officer.

![Figure 90: Signature Requirements](image)

By clicking the CONTINUE button below, I understand that this action will serve as my electronic signature of agreement that all information in my campaign finance disclosure filing is true and accurate to the best of my knowledge and that by law this electronic signature will have the same effect as a signature on a paper form.
9.8 Form 460-T: Recipient Committee Campaign Statement Termination

The Form 460-T is available for Recipient Committees.

9.8.1 Signature Requirements

The Form 460 requires a signature from the Controlling Candidate/Officeholder or Principal Officer, and Treasurer or Treasurer Assistant. If the Candidate and Treasurer are the same person, they may sign twice by selecting the checkbox below.

Note: this option only becomes available if the same name is entered for both the Candidate and the Treasurer in CampaignDocs by the Filing Officer.

Figure 91: Signature Requirements
9.9 Form 462: Verification of Independent Expenditures

The Form 462 is available for the following Filer Type:

- Committees making Independent Expenditures

*Note: this Form may not be available for all Filers.*

9.9.1 Signature Requirements

The Form 462 does NOT require an electronic signature because it is a “Print Only” form.

9.9.2 Sample Form 462:

*Note: there is no electronic submission for this form. You’ll notice there is only a “Print Form” option in the upper right corner.*

Figures 92 & 93: Sample Form & Print Verification
9.10 Form 496: 24-hour Independent Expenditure Report

The Form 496 is available for the following Filer Types:

- Committees making or receiving Independent Expenditures.

Note: this Form may not be available for all Filers.

9.10.1 Signature Requirements

The Form 462 does NOT require an electronic signature.

9.11 Form 496: 24-hour Contributions Report

The Form 496 is available for the following Filer Types:

- Committees making or receiving Contributions.

Note: this Form may not be available for all Filers.

9.11.1 Signature Requirements

The Form 462 does NOT require an electronic signature.