

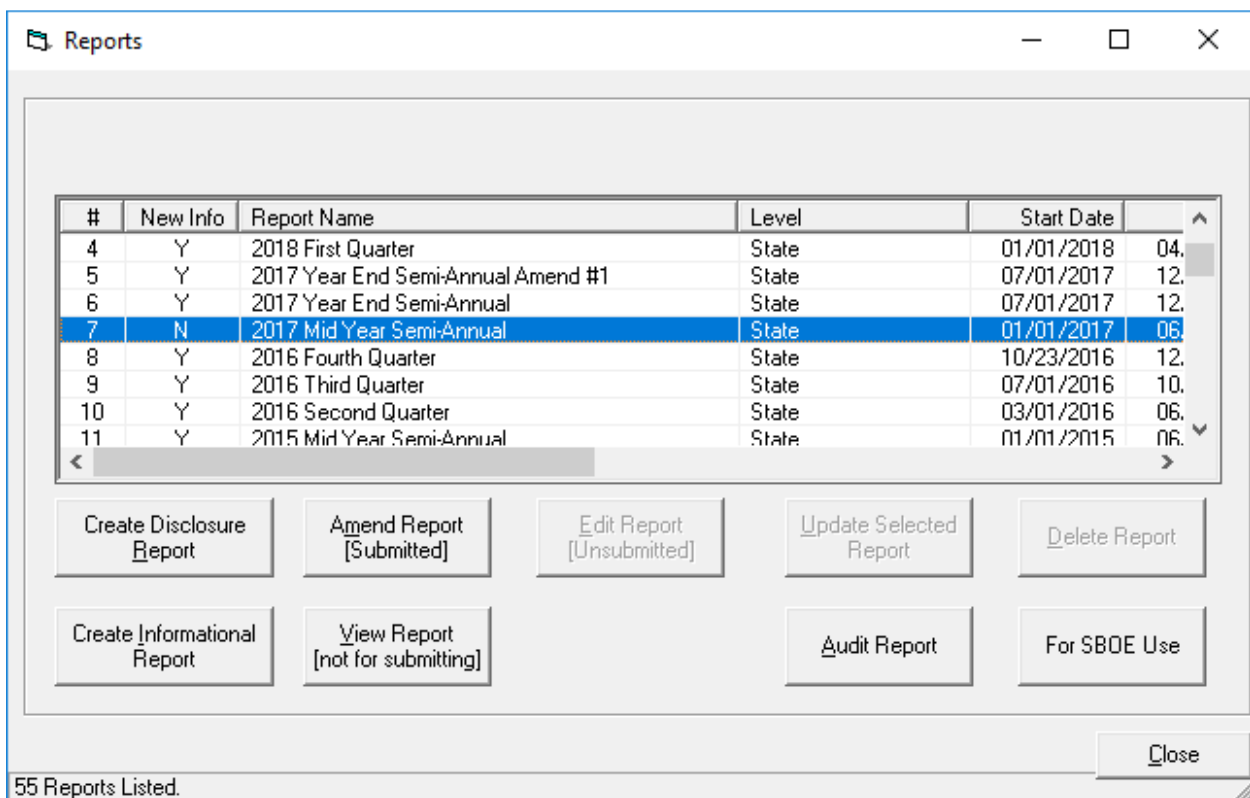
Amending a Report

A report can be amended for a variety of reasons. You may need to add some addresses for contributors and payees or include occupation/employment information, enter transactions you omitted on the original report or if you didn't link your report to the previous report.

Once you have made all needed corrections and/or additions to your transactions you are ready to amend the report.

To amend a report, go to the Reporting menu and select Report Information.

At the next screen, you will see a list of your reports:



The screenshot shows a window titled "Reports" with a table of reports and several action buttons. The table has columns for #, New Info, Report Name, Level, Start Date, and a small icon column. The report with #7 is selected. Below the table are buttons for "Create Disclosure Report", "Amend Report [Submitted]", "Edit Report [Unsubmitted]", "Update Selected Report", "Delete Report", "Create [Informational] Report", "View Report [not for submitting]", "Audit Report", and "For SBOE Use". A "Close" button is in the bottom right corner. The status bar at the bottom left says "55 Reports Listed."

#	New Info	Report Name	Level	Start Date	
4	Y	2018 First Quarter	State	01/01/2018	04.
5	Y	2017 Year End Semi-Annual Amend #1	State	07/01/2017	12.
6	Y	2017 Year End Semi-Annual	State	07/01/2017	12.
7	N	2017 Mid Year Semi-Annual	State	01/01/2017	06.
8	Y	2016 Fourth Quarter	State	10/23/2016	12.
9	Y	2016 Third Quarter	State	07/01/2016	10.
10	Y	2016 Second Quarter	State	03/01/2016	06.
11	Y	2015 Mid Year Semi-Annual	State	01/01/2015	06.

55 Reports Listed.

Highlight the report you wish to amend (click on the report name) and select the button Amend Report (submitted). The next screen will show all information that was previously entered:

Report Information

Year: 2017 | Filing Schedule: State

Previous Report Link: 2016 Fourth Quarter [10/23/2016 - 12/31/2016] | Edit Summary Values

Report Type: Mid Year Semi-Annual

Is Amendment: Yes No

Report Period Dates: Start Date: 01/01/2017 | End Date: 06/30/2017 | Due Date: 07/28/2017 | Submit Date:

Fundraiser Activity: Num of Fundraisers: 1

Message text... Show ALL Detailed Contributor Information (Optional) Show ALL Detailed Expenditure Information (Optional)

Account Summary List | Exempt Sale List

Name	Code	Begin Balance	End Balance
TEST NEW BANK	101010		
TEST NEW BANK	CD		

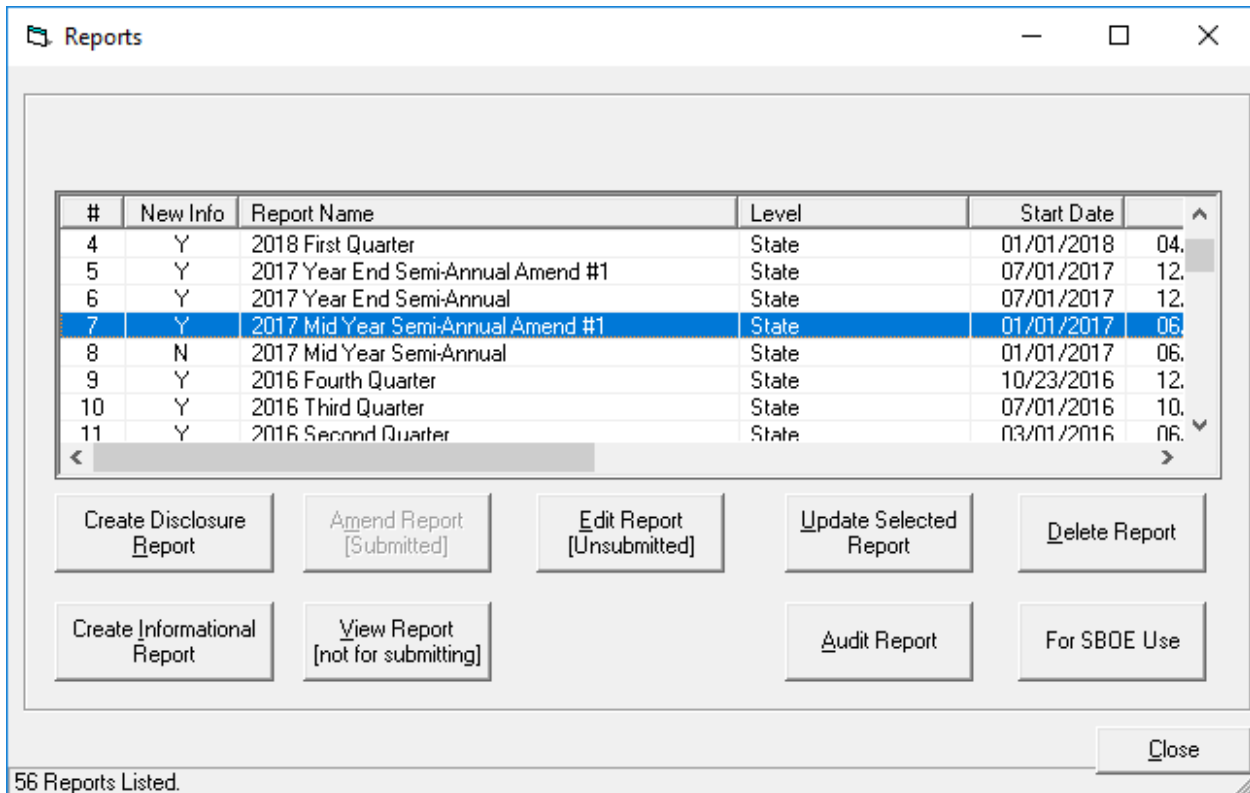
Reset Defaults | Ok | Close

Make sure this information is correct.

Add the number of fundraisers.

Select OK

You will be back at the reports list and you will now see the amended report listed:



The screenshot shows a window titled "Reports" with a table of reports and several action buttons. The table has columns for #, New Info, Report Name, Level, Start Date, and a page indicator. Row 7 is highlighted in blue. Below the table are buttons for "Create Disclosure Report", "Amend Report [Submitted]", "Edit Report [Unsubmitted]", "Update Selected Report", "Delete Report", "Create [Informational] Report", "View Report [not for submitting]", "Audit Report", and "For SBOE Use". A "Close" button is at the bottom right. A status bar at the bottom left says "56 Reports Listed."

#	New Info	Report Name	Level	Start Date	
4	Y	2018 First Quarter	State	01/01/2018	04.
5	Y	2017 Year End Semi-Annual Amend #1	State	07/01/2017	12.
6	Y	2017 Year End Semi-Annual	State	07/01/2017	12.
7	Y	2017 Mid Year Semi-Annual Amend #1	State	01/01/2017	06.
8	N	2017 Mid Year Semi-Annual	State	01/01/2017	06.
9	Y	2016 Fourth Quarter	State	10/23/2016	12.
10	Y	2016 Third Quarter	State	07/01/2016	10.
11	Y	2016 Second Quarter	State	03/01/2016	06.

In this example, we amended the 2017 Mid Year Semi Annual report. You will now see a 2017 Mid Year Semi Annual Amend #1 on the list.

If this is the second time you have amended a report it will show Amend #2 and so on.

You should view the report to make sure all changes and corrections are shown. Select the report and click View Report (not for submitting) .

When you are certain that everything is correct, you are ready to send the report to the Board of Elections. Save the Official Report as usual, email the data file and sign and mail the cover page and detailed summary.

Troubleshooting

You are trying to amend a report, but the Amend Report (submitted) button is greyed out.

This indicates that the report was not originally saved correctly. Go to the Reporting menu, and select Save Official Report. Run through the process to save the report.

Go to Reporting – Report Information and highlight the report, and now the amend button should be active.

You amend the report, and when you view it you notice that an address is missing. You fix the data, then come back to the reports screen and view the report again but the address is still missing.

If you amend transactions you need to update the report before you can see those changes. Go to Reporting – Report Information, highlight the report and select the button Update Selected Report. You can then view the report again, and you will see your changes recorded.