Wyoming Campaign Finance Information System (WYCFIS)

User's Guide

Wyoming Secretary of State's Office

Revised April 14, 2010

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WYCFIS User's Guide

Welcome to **WYCFIS** – **W**yoming's **C**ampaign **F**inance **I**nformation **S**ystem!

The Wyoming Secretary of State's Office is excited to announce that statewide candidates, candidate committees, political action committees, organizations and political parties now have the ability to file campaign finance disclosure reports online. The Secretary of State's Office maintains a secure website for the filing of campaign finance disclosure reports as well as a public access site for anyone to search for specific information as well as view statistics and reports.

This User's Guide is intended to provide information to approved account holders to assist in navigating the disclosure portion of the site; understanding the process of filing; and understanding key terms.

1.0 System Information

Web Browser: The Wyoming Campaign Finance Information System (WYCFIS) is a web-based application requiring Internet access and a web browser. Recommended web browsers are Internet Explorer 6.x and 7.x, as well as FireFox 3.5 and higher. If you are utilizing Internet Explorer 8.x, it is recommended that the browser run in "IE 7 Emulation" mode. Less common browsers such as Chrome or Safari may not provide optimal viewing of this site.

Pop-Up Blocker: Many reports accessed from the Home Page of WYCFIS as well as those reports accessed by authorized users will generate to a PDF file in a pop-up window. Therefore, the user should set his/her Internet browser to allow pop-ups from this site.

Operating System: WYCFIS has been tested on Windows XP, Windows 7, and Leopard 10.x.

2.0 Account Information

Why Create an Account?

All campaign finance reports required to be filed with the Secretary of State's Office must be filed electronically. Wyoming Statute 22-25-107(b) states, "After December 31, 2009, all statements filed with the secretary of state shall be filed electronically."

Who Must File?

- Candidates and potential candidates seeking a state office;
- Candidate Committees;
- Political Action Committees (PAC);
- Organizations supporting or opposing an initiative, referendum, or constitutional amendment; and
- Political Parties.

Who Must Create an Account?

An account must be established with information about the account user in order to gain access to the online electronic filing system. This includes:

- Candidates and potential candidates seeking a state office;
- The treasurer and chairman of each candidate committee and political action committee (PAC);
- The people acting in the capacity of treasurer and chairman for organizations supporting or opposing an initiative, referendum, or constitutional amendment;
- The chairman or designee for each county and state political party committee; and
- Anyone forming a candidate committee or political action committee.

3.0 Reports and Due Dates

Candidates

Each candidate is required to file a campaign report within the filing deadlines outlined below, whether the candidate is successful or not. This includes candidates who neither receive nor spend any money during the campaign.

Candidates who are running for office in 2010 are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
PRE-PRIMARY REPORT	1/1/2010	8/3/2010			Anytime 08/03/2010 through 08/10/2010	R
PRIMARY REPORT	8/4/2010	8/16/2010	1/1/2010	8/16/2010	Anytime 08/17/2010 through 08/27/2010	R&E
PRE-GENERAL REPORT	8/17/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	8/17/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Candidates receiving contributions during the 2010 election cycle but who are not running for office during this year are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
PRE-PRIMARY REPORT	1/1/2009	8/3/2010			Anytime 08/03/2010 through 08/10/2010	R
PRE-GENERAL REPORT	8/4/2010	12/31/2010			Anytime 10/19/2010 through 10/26/2010	R

Candidate Committees

Each candidate committee is required to file a campaign report within the filing deadlines outlined below, whether the candidate is successful or not.

Committees supporting candidates who are running for office in 2010 are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
PRE-PRIMARY REPORT	1/1/2010	8/3/2010			Anytime 08/03/2010 through 08/10/2010	R
PRIMARY REPORT	8/4/2010	8/16/2010	1/1/2010	8/16/2010	Anytime 08/17/2010 through 08/27/2010	R&E
PRE-GENERAL REPORT	8/17/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	8/17/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Committees supporting candidates who may receive contributions during the 2010 election cycle but who are not running for office during this year are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
PRE-PRIMARY REPORT	1/1/2009	8/3/2010			Anytime 08/03/2010 through 08/10/2010	R
PRE-GENERAL REPORT	8/4/2010	12/31/2010			Anytime 10/19/2010 through 10/26/2010	R

Political Action Committees

Each political action committee is required to file a campaign report within the filing deadlines outlined below:

Political Action Committees which are supporting or opposing candidates are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
PRE-PRIMARY REPORT	1/1/2010	8/3/2010			Anytime 08/03/2010 through 08/10/2010	R
PRIMARY REPORT	8/4/2010	8/16/2010	1/1/2010	8/16/2010	Anytime 08/17/2010 through 08/27/2010	R&E
PRE-GENERAL REPORT	8/17/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	8/17/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Political Action Committees which are sponsoring a ballot issue for Election Year 2010 are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
30-45 DAYS PRIOR TO THE GENERAL	1/1/2010	9/18/2010	1/1/2010	9/18/2010	Anytime 09/19/2010 through 10/03/2010	R&E
PRE-GENERAL REPORT	9/19/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	9/19/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Political Action Committees which are supporting or opposing a ballot issue are required to file the following reports:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
30-45 DAYS PRIOR TO THE GENERAL	1/1/2010	9/18/2010	1/1/2010	9/18/2010	Anytime 09/19/2010 through 10/03/2010	R&E
PRE-GENERAL REPORT	9/19/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	9/19/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Organizations

Any organization supporting or opposing a ballot proposition or an initiative or referendum petition drive shall file a fully itemized campaign report within the filing deadlines outlined below:

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
30-45 DAYS PRIOR TO THE GENERAL	1/1/2010	9/18/2010	1/1/2010	9/18/2010	Anytime 09/19/2010 through 10/03/2010	R&E
PRE-GENERAL REPORT	9/19/2010	10/19/2010			Anytime 10/19/2010 through 10/26/2010	R
GENERAL REPORT*	10/20/2010	12/31/2010	9/19/2010	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

* The General R&E report may be amended at any time after the General Election through the end of the election cycle. The amendments will likely be the recording of receipts received and expenses paid after the election; thus the timeframe.

Political Parties

The chairman of each political party central committee for the state or county, or an officer of the party designated by him, is required to file a campaign report within ten (10) days after a general or special election.

Type of Reporting Period	Reporting Date Range				Filing Due Date	Reporting Types
	Contributions		Expenditures			
	Start date	End Date	Start date	End Date		
ELECTION CYCLE REPORT	1/1/2009	12/31/2010	1/1/2009	12/31/2010	Anytime 11/02/2010 through 11/12/2010	R&E

4.0 Post-Login

Once a user account has been created and approved by the Secretary of State's Office, the user will be emailed a notice of account approval. The approval may contain several items depending on the type of account or formation created. One item will be a system generated password. This gets you into the system. Once in, the user can change his password to something he will more easily remember.

Upon successful login, the user will be presented with several menu items:

- Account Home
- Manage Contributions
- Manage Expenditures
- Upload Data Files
- File Report
- Filing History
- Close / Terminate Account
- Pending Approvals
- Help File

Let's take a look at each of these in more detail.

Account Home

After logging into your WYCFIS account, you are automatically at your Account Home.

If you only have one account, you will immediately see the Message Center showing alerts and upcoming deadlines.

If you have more than one account, your Account Home will show you all of those accounts. When you choose one, you will be taken to the Message Center for that account.

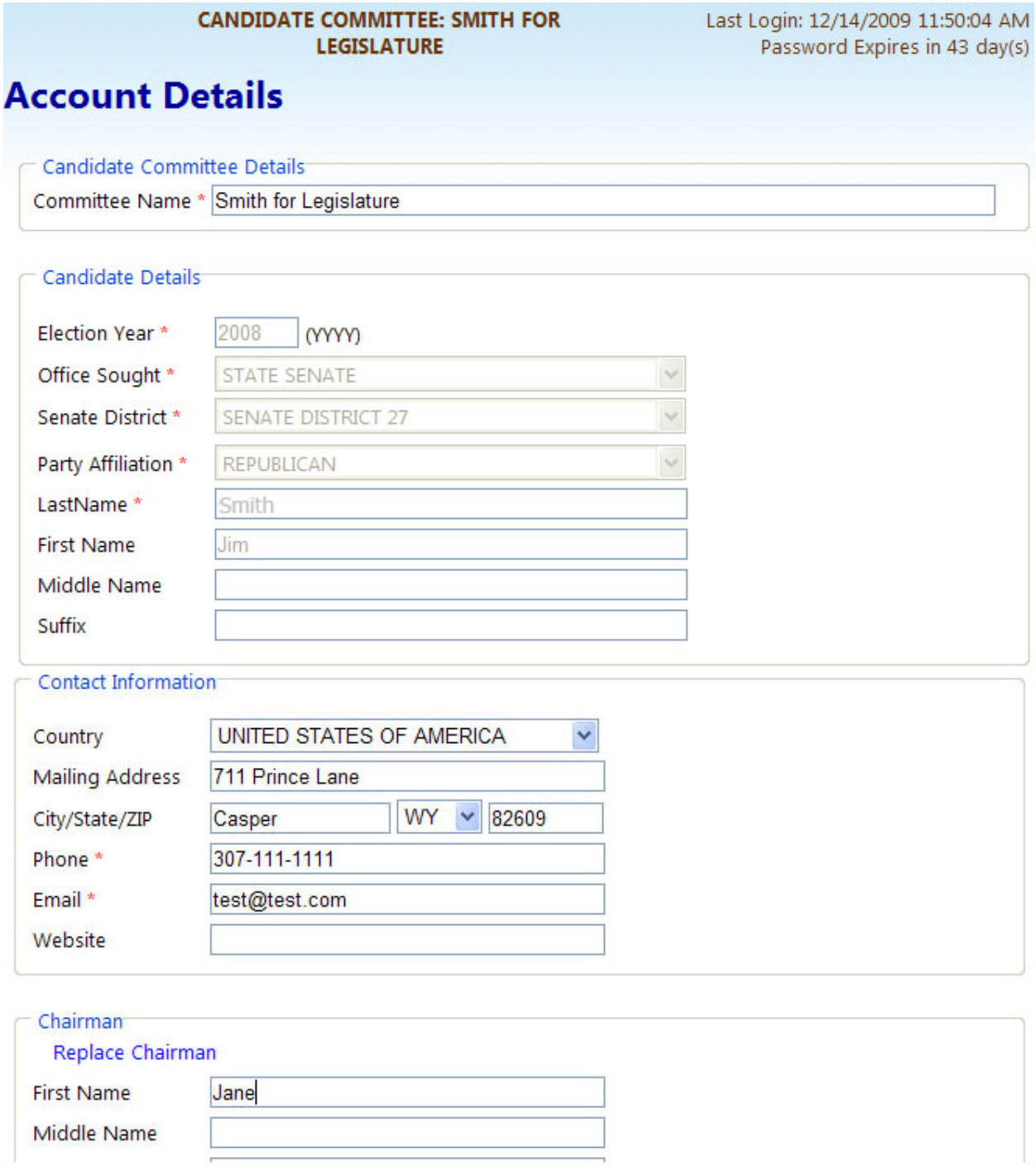
Here is an example:

Alerts and Messages

Important messages and alerts will be displayed in this area along with a heads-up about required upcoming reporting dates.

Account Details

Specific information about your user (committee, organization, party) account can be changed at any time under this link. Whenever you have a change in information, remember to update the information for your account!

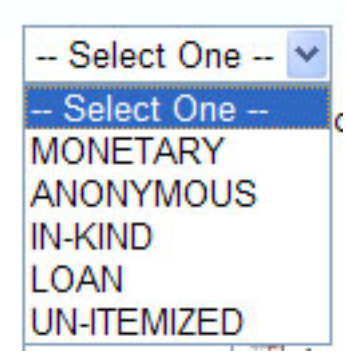


Manage Contributions

All contributions are entered, edited and amended under this link.

Searches can be conducted for all or specific contributions that you have entered. To search for **all** contributions, do not enter any criteria; simply click on "Search" and you'll get it all!

When adding a contribution, the contribution types, which are self-explanatory, are:



There are no limits on how much a candidate can spend, but there are limits on how much an individual can contribute. The chart below outlines the contribution limits and prohibitions under Wyoming law.

Contribution From	To Candidate or Candidate's Campaign Committee	To Political Party Committee	To Political Action Committee
Individual	A specific limit of $1,000 per candidate per election. A general limitation of no more than $25,000 in total contributions within the same two-year period.[1]	No Limit[2]	A specific limit of $1,000 per candidate per election. A general limitation of no more than $25,000 in total contributions within the same two-year period.[3]
Political Party Committee	No Limit	No Limit	No Limit
Political Action Committee (PAC)	No Limit	No Limit	No Limit
Corporation, Union, Partnership, Professional Association or Civic, Fraternal or Religious Group	Prohibited from making contributions to candidates and political parties. However, these organizations may make contributions to support or oppose a ballot proposition or an initiative or referendum petition drive. **CAUTION:** A non-profit (501)(c) organization should consult an attorney, an accountant or the Internal Revenue Service before making contributions to an initiative or referendum drive to avoid jeopardizing its tax status.		

[1] For example, if a person contributed $1,000 to a political candidate, that would leave $24,000 available for contributions under these categories within the two-year period. The two-year period consists of a general election year and the preceding calendar year.

[2] No Limit "…provided the contributions are available to use as the appropriate party authorities choose and are not exclusively dedicated to any particular candidate. Contributions donated to a political party which are designated by the donor to be used only for a particular candidate and no other purpose are subject to limitations…" W.S. 22-25-102(f).

[3] "No individual……shall contribute directly or indirectly…" more than $1,000 per election nor more than $25,000 per election period. W.S. 22-25-102(c).

When entering contributions, there are three statues: “Saved Private,” “Published,” and “Filed.”

As you enter contributions and save them, they are automatically “Saved Private” which means only you will be able to see and search them (see definitions below). Transactions are “Saved Private” until you are ready to “Publish” them for public view or “File” them as your final report. The grid below is a search tool that shows you the various transactions you have entered. Each tab represents a status and, if selected, will show you those transactions having the specified status.

All | Saved Private | Published | Filed | Amended

SEL	Source	Name	Type	Date	Amount	Status
☐	WYOMING COUNTY PARTY	NATRONA REPUBLICAN PARTY CENTRAL COMMITTEE	MONETARY	10/29/2008	$100.00	SAVED PRIVATE
☐	WYOMING STATE PAC	FFFWY FIRE PAC	MONETARY	10/29/2008	$300.00	SAVED PRIVATE
☐	WYOMING STATE PAC	WY EDUCATION ASSN. PAC FOR EDUCATION	MONETARY	10/26/2008	$500.00	SAVED PRIVATE
☐	INDIVIDUAL	Various, Education Personnel	MONETARY	10/25/2008	$370.48	SAVED PRIVATE
☐	INDIVIDUAL	Various, Education Personnel	MONETARY	10/24/2008	$171.34	SAVED PRIVATE

Status Definitions: Some WYCFIS definitions which might help you use the system are listed below:

All: *Complete list of transactions regardless of status, ordered by date; for viewing only.*

Saved Private: *Transactions not available to the public. Available only to you and other committee officers.* By default, all transactions entered into WYCFIS are “Saved Private.” This means that the transaction is a part of the database, but it is not available to the public or to the Secretary of State’s Office to view. It may be edited at any time by simply selecting the record and selecting “Edit.”

Published: *Transactions already available to the public prior to official filing.* Items which you wish to be available to the public to view may be moved to a "Published" status.

To "Publish:"

- Select the transactions under the "Saved Private" tab by clicking in the checkbox.
- Once you have selected all or a specific item, a "Publish" button is available to click.
- Published means that the transaction has been made available to the public to view PRIOR to the official filing being made public. "Published" transactions may be edited by being moved back to "Saved Private" and selected for modification. They may then be published again if you so choose.
- For committees or organizations, the action of publishing requires approval by both individuals affiliated with the committee or organization before it is made public.

Filed: *Transactions which have been officially reported to the Secretary of State's Office.* In order to meet statutory requirements, transactions must be filed within specified time frames. Transactions falling within the filing start and end dates, which are "Saved Private" or "Published," will be moved to a status of "Filed" only when you choose to submit the transactions. Items which have been filed cannot be edited. Instead, they must be "Amended." Wyoming statutes require that for committees and organizations, both the chairman and treasurer approve the filing.

Amended: *Amended transactions which have already been filed with the Secretary of State's Office. To file an Amendment, go to the "Filed" tab.* Once transactions have been statutorily "Filed," they may only be amended – either added or deleted. For details, please see "Amend Report" on page 13.

Editing: Transactions that are “Saved Private” or “Published” may be edited. Go to the “Saved Private” or “Published” tab in the search results grid to begin the edit process.

Editing transactions that are “Saved Private” is a simple process! On the “Saved Private” tab, locate the transaction(s) you wish to modify, place a checkmark in the “Select” column, and choose the “Edit” button at the bottom of the screen. Once the edit is complete, simply click on the “Save” button.

Transactions that are already “Published” must first be “Unpublished” before editing. You will locate the transaction(s) you wish to edit under the “Published” tab. Place a checkmark in the “Select” column, and choose the “Unpublish” button at the bottom of the screen. Once the transaction is “Unpublished,” the status of that transaction returns to “Saved Private.” Once “Saved Private,” you will use the same process described above. Reminder - for committees or organizations, the action of publishing or unpublishing requires approval by both officers of the committee or organization.

If a report is “Filed,” you can’t just make an “Edit.” Filed documents must be “Amended” in order to remedy any errors or omissions. Please see the section titled “Amend Report” under “File Reports.”

ADVERTISING
ADVERTISING - NEWSPAPER
ADVERTISING - RADIO
ADVERTISING - TV
BANKING
CAMPAIGN MERCHANDISE (YARD SIGNS, BUTTONS, PENCILS, PENS, ETC...)
CONSULTING
ENTERTAINMENT
FACILITY FEE
FOOD AND BEVERAGES
GRAPHIC DESIGN & WEBSITE
IT SERVICES
OFFICE SUPPLIES
PAYROLL
PHONE
POSTAGE
PRINTING
RENT
SHIPPING
TAXES
TRAINING MATERIALS
TRAVEL (HOTEL, GAS, AIRLINE, CAR, ETC¿)
UTILITIES - GAS & ELECTRIC
OTHER

Manage Expenditures

All Expenses are entered, edited and amended under this link. The WYCFIS status definitions listed above also apply to expenditures (see definitions of “All,” “Saved Private,” “Published,” “Filed,” and “Amended” above).

The process of editing a “Saved Private” or “Published” transaction is also the same as described above.

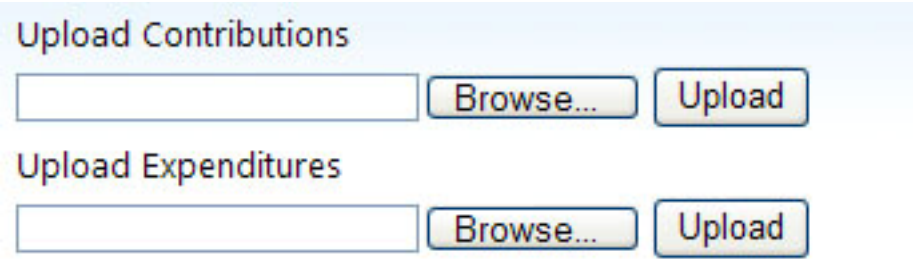
Searches can be conducted for all or specific expenditures just as they can for specific contributions.

To search for all expenditures, do not enter any criteria; simply click on “Search” and you will get them all!

Adding expenditures requires the user to select a purpose for the expenditure. If the purpose is not listed in the drop down list, select “other” and another window will pop up for you to enter a new purpose. See diagram to the left.

Upload Data Files

The Upload Data File link is for those using third-party vendor software for managing political activities or for those using the pre-defined Excel spreadsheet. This page provides the user with the ability to upload a text file of contributions and expenditures.



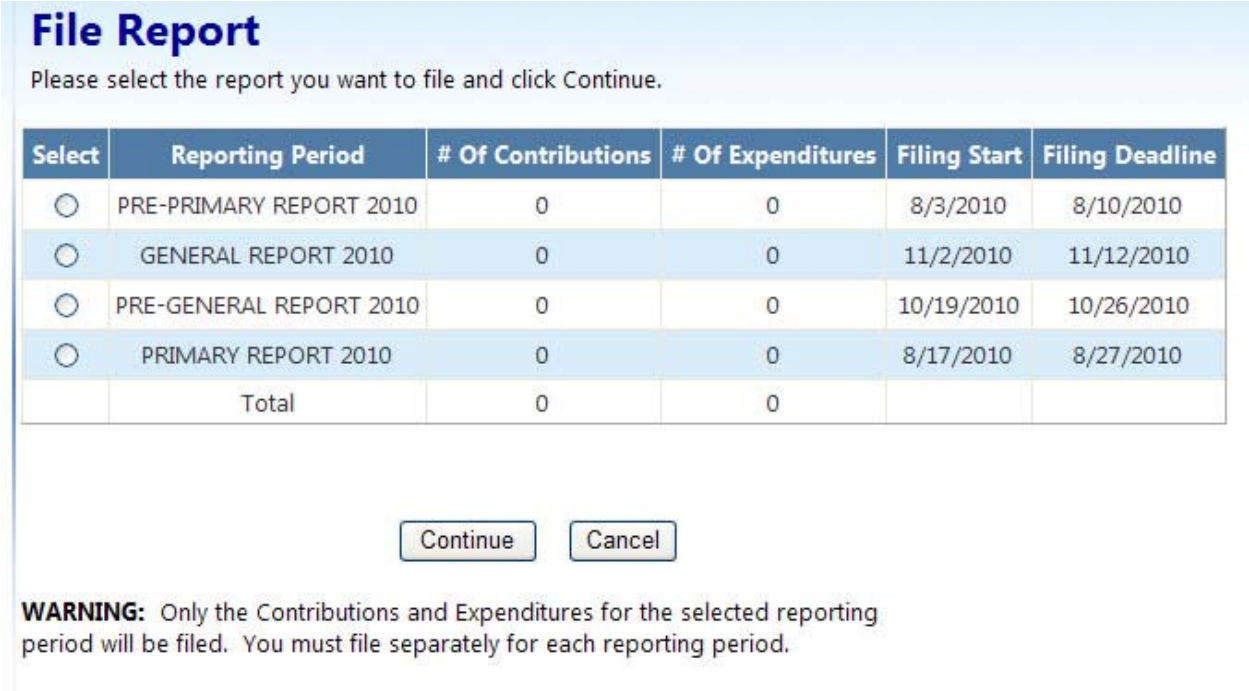
The upload process automatically saves all transactions with a “Saved Private” status.

CAUTION: When uploading, the user is responsible for ensuring that duplicates have not been uploaded since in an auto-upload, the receiving system (WYCFIS) has no means of “knowing” if a transaction is a duplicate.

File Report

To meet statutory requirements, you must submit your final campaign finance reports to the Secretary of State's Office by specific deadlines. This link provides you with that ability. Filing deadlines for each report are listed in the Upcoming Reporting Deadlines matrix on the WYCFIS Home page and also appear in your account Message Center. Remember – if two signatures are required for filing a required report, both signatures must be obtained electronically. The system will assist you in this process.

NOTE: WYCFIS will automatically determine which contributions and expenses entered into the system, based on transaction date, are to be included in a specific reporting period.



File Report

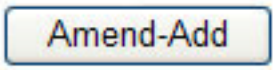
Please select the report you want to file and click Continue.

Select	Reporting Period	# Of Contributions	# Of Expenditures	Filing Start	Filing Deadline
○	PRE-PRIMARY REPORT 2010	0	0	8/3/2010	8/10/2010
○	GENERAL REPORT 2010	0	0	11/2/2010	11/12/2010
○	PRE-GENERAL REPORT 2010	0	0	10/19/2010	10/26/2010
○	PRIMARY REPORT 2010	0	0	8/17/2010	8/27/2010
	Total	0	0		

Continue Cancel

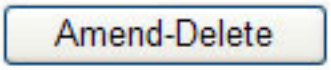
WARNING: Only the Contributions and Expenditures for the selected reporting period will be filed. You must file separately for each reporting period.

Amend Report: Filed documents must be “Amended” in order to remedy any errors or omissions. If a report is “Filed,” you can’t just make an “Edit.”



To add a new transaction to a “Filed” report, the easiest way is to go to “Manage Contributions” or “Manage Expenditures” and select “Add Contribution” or “Add Expenditure.” You will then enter the transaction as you normally would. When you “Save” the transaction, the system will recognize the transaction as an amendment to a “Filed” report and will ask if you want to amend that filing.

An alternate way to “Amend-Add” is to go to “Manage Contributions” and do a search for your records. Then to add a transaction, navigate to the “Filed” tab and select “Amend – Add.” You would use the same process to add expenditures.



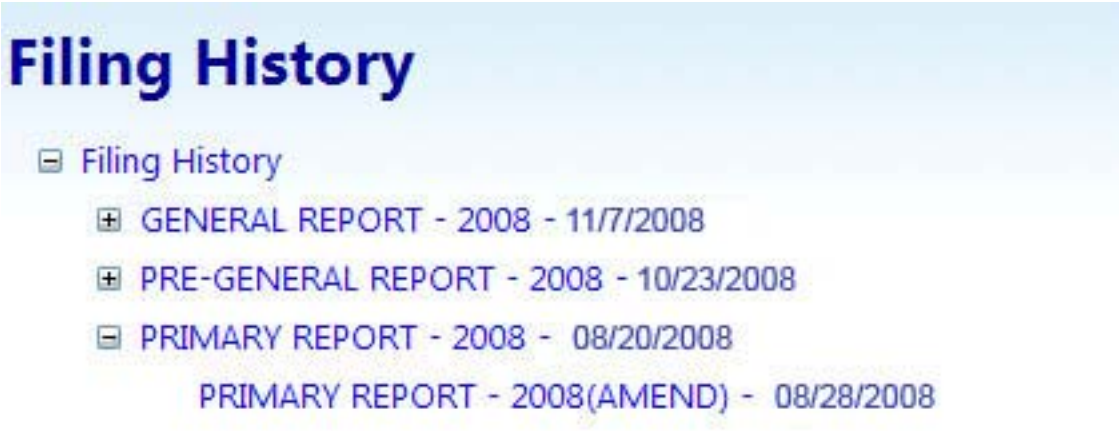
If an error is found in a transaction which has already been “Filed,” that transaction should be selected from the “Filed” tab under “Manage Contributions” or “Manage Expenditures.” “Amend – Delete” should then be chosen. Once deleted, the user can enter the correct information by using the “Amend – Add.”

Like the initial statutory filing, amended items require both chairman and treasurer approval for committees and organizations. Once both approvals are given, the transactions are completed and can be found under the “Amended” or “All” tabs under Manage Contributions or Manage Expenditures.

Filing History

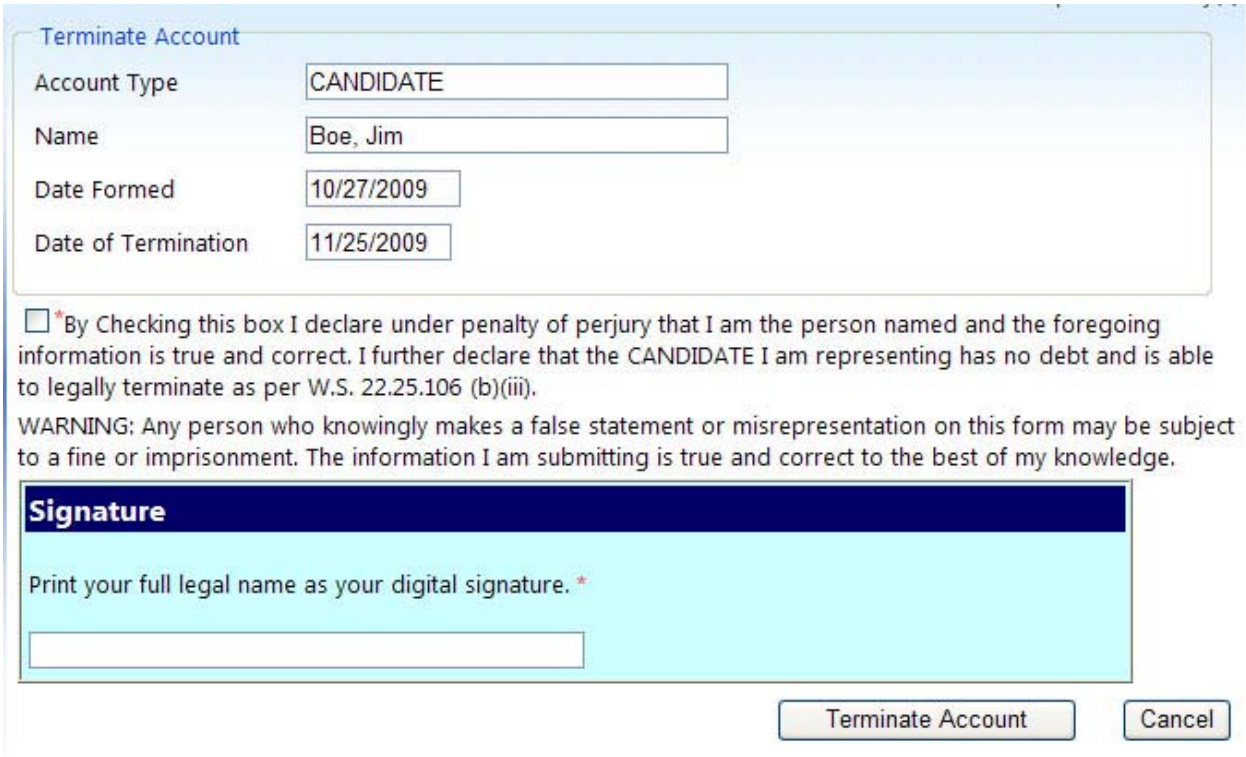
The Filing History page provides the user with quick access to all statutorily required campaign finance reports which have been filed electronically. The history appears in reverse chronological order, with the most recent filing appearing at the top.

If amendments to a filing have been filed, that information is accessed by clicking on the plus sign (+) which appears next to each filing.



Close / Terminate Account

When your candidate, candidate committee, PAC, or organization ceases to exist or no longer needs an account for reporting purposes, this link provides the mechanism by which to terminate or deactivate your account.



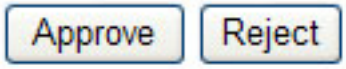
Individual user accounts associated with the candidate, candidate's committee, PAC, organization, or political party designee will be accessible for 365 days after the date of termination in order to accommodate the filing of any amendments on reports already filed or the filing of any missed reports.

IMPORTANT: Until your candidate, candidate's committee, PAC, organization, or political party designee account has been terminated, you are responsible for filing all campaign finance reports required by statute.

Pending Approvals

Candidate committees, PACs, and organizations require the signature of both the chairman and treasurer in order to “Publish” or “Unpublish” transactions; “File” statutorily required reports; or “Amend” already filed reports. The “Pending Approvals” link is where you will find all three items if one signator has signed and the report is still in need of the second signature.

Approve or Reject:



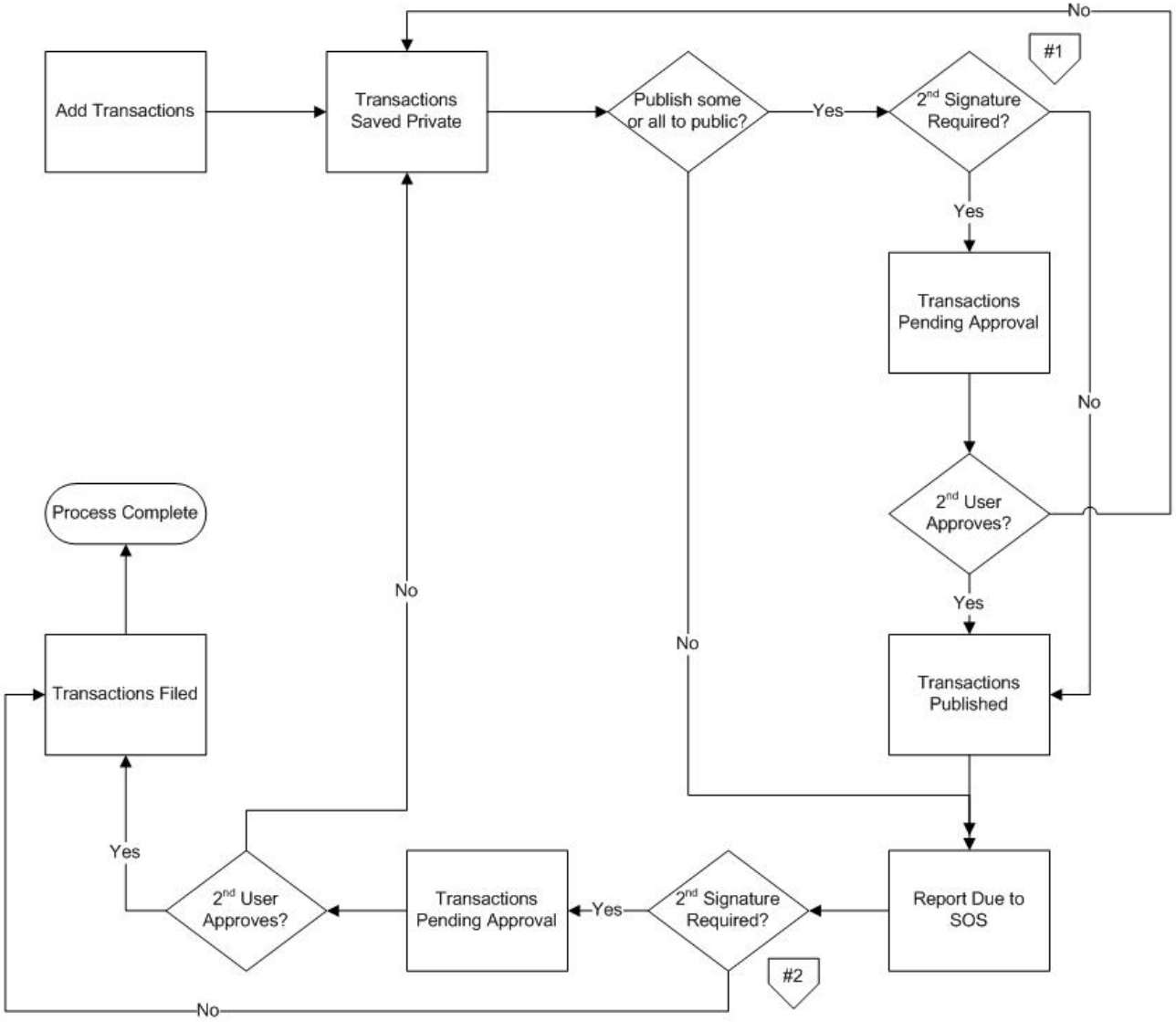
If there is any part of the filing with which you disagree, you should reject. If you “Reject” because of an inaccurate entry, the previous transaction status will be applied for all transactions related to the filing. For example, if “Saved Private” transactions were selected by the chairman for publishing and the treasurer chooses to reject the publishing, those transactions will be returned to a status of “Saved Private.”

IMPORTANT: When Rejected, all transactions are retained within the system; you do not lose any data, it just reverts to the previous transaction status.

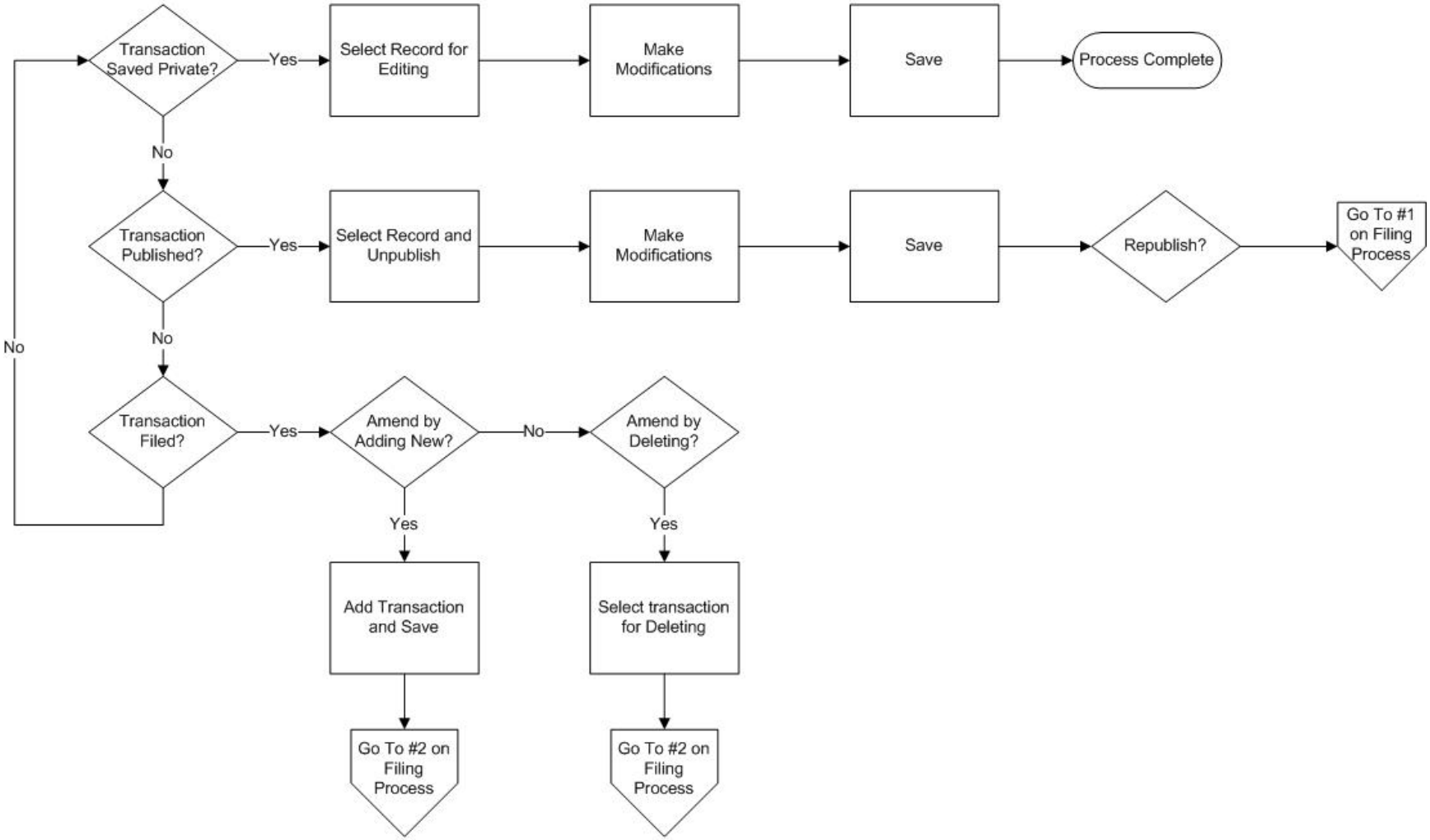
Once rejected and back to the previous status, the chairman or treasurer can modify the inaccurate entry by locating it under Manage Contributions or Manage Expenses.

Visual Aid of the Filing Process

Transaction Filing Process
Wyoming Campaign Finance Information System



Editing or Amending Existing Transactions
Wyoming Campaign Finance Information System

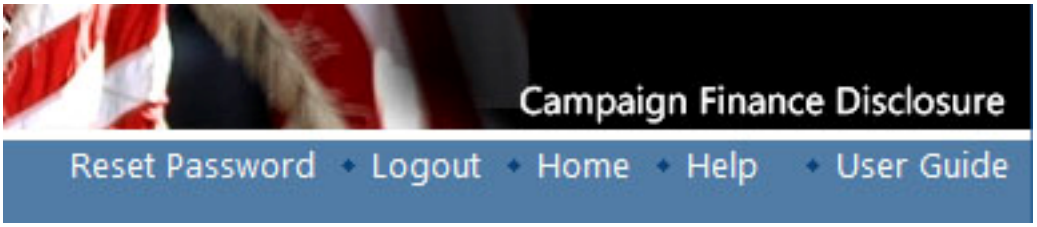


Tool Tips and Help File

WYCFIS has many Tool Tips found throughout the application.

Anywhere you see this image more information is available. If you click on the a text box will appear providing you with helpful information.

In addition, there is a built-in Help File for all screens. To access the Help File simply click on the "Help" link which appears in the upper left corner of your screen.



Additional References

Additional reference information such as Statutes and the Campaign Guide can be found through the Elections webpage at http://soswy.state.wy.us/Elections/Elections.aspx.