IEDS Help:

Communications & Expenditures

Entering a New Communication

A communication and its associated expenditures and payments become reportable once you have spent $1,000 or more on communications that feature and/or reference a specific candidate. Once the reporting requirement is triggered, it applies to that candidate retroactively and for the remainder of the election cycle. You must report at least one expenditure when reporting a new communication; for instructions see **Entering a New Expenditure for a New Communication**.
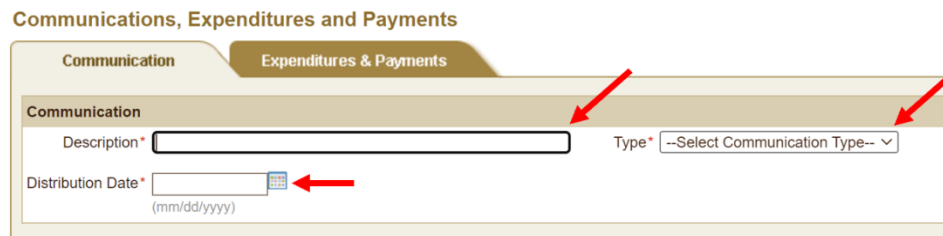
1. Click on **Communications & Expenditures** in the sidebar of the IEDS home screen.

2. Click **Add New Communication.**

3. Enter the **Description**, **Communication Type**, and **Distribution Date** of the communication.

♦ **NOTE:** The **Description** you enter will be visible in the CFB's searchable database. Select an appropriate and easily identifiable name for your **Communication**.

4. Add the **Candidates/Ballot Proposals** featured in the communication by typing their last name in the search box or select them from the drop down by clicking ↓; if you cannot find the correct **Candidate** or **Ballot Proposal**, click **Could not find in My Candidates/Proposals**.

5. Select **Upload file with next report**, click **Choose File** to locate the correct document, and click **Save** after uploading.

- ♦ **NOTE:** You can select **Mail communication to CFB** if you are entering data but do not yet have a copy of the communication to allow you to save the record. You must upload the document prior to reporting the **Communication**, or mail it to CFB so that it <u>received</u> by the report due date.

- ♦ The following file formats are accepted for **Communication** documentation: aac, flv, jpg, jpe, mov, m4a, mp3, mp4, mpg, pdf, png, qt, ra, rv, tif, tiff, txt, wma, and wmv. Do not submit zips.

Entering a New Expenditure for a New Communication

1. After saving a **Communication**, press **Add New Expenditure** in the **Communication** tab, or click on the **Expenditures & Payments** tab and click **Add New Expenditure.**

2. Search for the **Vendor** by typing in the search box or select them from the drop down by clicking ↓. If this is a new **Vendor**, click **Could not find my Vendor** and enter the relevant information in the popup window and click **Save**.

3. Enter the **Expenditure Date**, **Expenditure Amount**, and **Purpose.** The **Description** box is for your use only and will not be included in your disclosure report.

4. Allocate the appropriate amount of the expenditure to each **Candidate** featured in the **Communication**; if there is only one featured candidate, or if all candidates will be allocated the same amount, click **Set Equal Allocation**.

Candidate/Proposal Allocation	Set Equal Allocation
Candidate/Proposal	**Allocation Amount**
McTester, Test	$0.00
Total Allocated:	$0.00

5. Upload the invoice or other documentation for the expenditure by answering the **Does this invoice support more than one expenditure**, selecting **Upload file with next report**, and clicking **Choose File** to locate the correct document. (If the invoice or documentation will be uploaded to multiple **Expenditures**, see **Uploading a Shared Invoice**)

Copy of Invoice or Other Documentation

Does this invoice support more than one expenditure? ◉ No ○ Yes

How to Send to CFB? ◉ Upload file with next report ○ Mail document to CFB
Document will not be transmitted to CFB until you file your next report.

Select a File* [Choose File] No file chosen

♦ The following file formats are accepted as **Expenditure** documentation: doc, docx, htm, html, mht, mhtml, pdf, rtf, txt, xls, and xlsx. Do not submit zips.

6. Enter the **Payment** information at the bottom of the page and click **Save**.

Payment Details

Date Paid [ ] 📅   Amount Paid [ ]
(mm/dd/yyyy)

Paid By [Independent Spender ∨]

[Save] [Clear] [Cancel]

♦ **NOTE:** It is normal for payment information to lag. Do not delay reporting a communication because it has not been paid yet. You can return to the **Expenditures & Payments** page to enter this information later (see **Adding Payment Information**).

Entering a New Expenditure for an Existing Communication

1. In the **Communications & Expenditures** section, search for the communication by **Candidate/Proposal**, **Type**, or **Description** and click **Search**; click on the ✎**Edit** button under actions after locating the correct communication.

2. Click on the **Expenditures & Payments** tab and click **Add New Expenditure**

3. Follow steps 2-6 above.

Uploading a Shared Invoice

If a single invoice covers multiple expenditures, you can upload the document once as a **Shared Invoice** and associate it with each expenditure as you enter your data.

1. At the documentation section for the first expenditure the invoice covers, select **Yes** for the **Does this invoice support more than one expenditure?** question and click **Could not find my Share Invoice.**

   Copy of Invoice or Other Documentation

   Does this invoice support more than one expenditure? ○ No ● Yes

   Shared Invoices*   ↓   Could not find my Shared Invoice

2. Enter the **Invoice Date** & **Invoice Amount** and click **Choose File** to locate the correct document from your files; then press **Add**.

   Add New Shared Invoice   ✕

   Shared Invoice Information
   Vendor Name **ABC Corp.**
   Invoice Date* [   ]   Invoice Amount* [   ]
   (mm/dd/yyyy)
   Description [   ]

   Copy of Shared Invoice
   How to Send to CFB? ● Upload file with next report ○ Mail document to CFB
   Document will not be transmitted to CFB until you file your next report.
   Select a File*   Choose File No file chosen

   Add   Clear   Cancel

   ♦ **NOTE:** The **Invoice Amount** should reflect the total amount of the invoice, the specific **Expenditure Amount** will be entered in the **Expenditure** section.

3. For all subsequent expenditures supported by the document, select the **Shared Invoice** from the drop-down menu by pressing ↓; the document will be identified by the **Invoice Date** & **Invoice Amount** you entered in the previous step.

4. The IEDS will keep track of how much of each **Shared Invoice** you have allocated. See Shared Invoices on the Setup and Administration menu.

Adding Payment Information

It is normal for expenditures to be unpaid at the time they are first reported. This is not a reporting problem, and you should never delay reporting a communication and/or expenditure simply because the invoice has not been paid yet. You can return to previously entered expenditures to enter or update payment information at any time.

1. Click on **Communications & Expenditures** in the sidebar of the IEDS home screen.

2. Select the relevant **Communication** from the list at the bottom; if you have many **Communications** you can search by **Candidate/Proposal**, **Type**, and/or **Description**. Once you have located the correct **Communication**, click on the ✎ **Edit** button under the **Actions** menu.
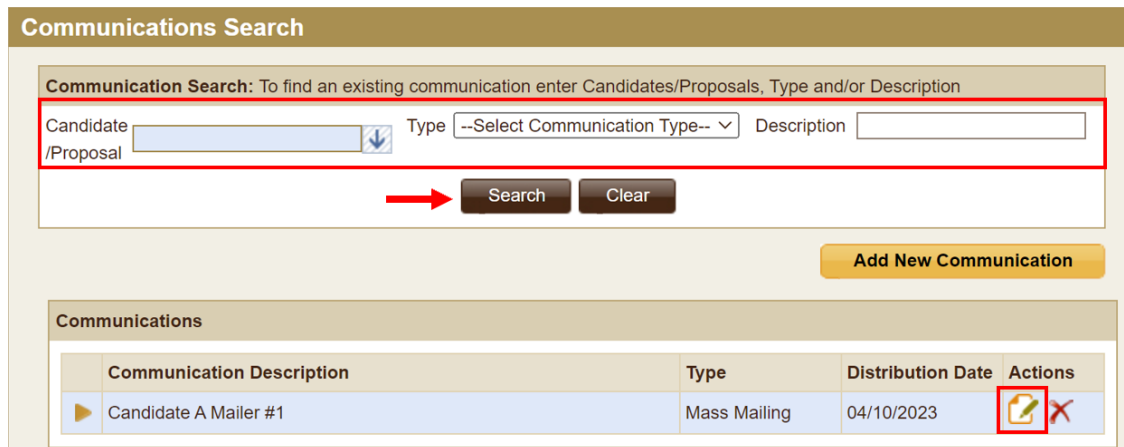
3. Click on the **Expenditures & Payments** tab, select the correct **Expenditure** row, and click **Add New Payment.**

4. Enter the **Date Paid**, **Amount Paid**, **Paid By** information in the **Payment Details** window and click **Save.**

Editing or Deleting a Communication, Expenditure, or Payment

Previously entered **Communications**, **Expenditures**, and **Payments** can be edited or deleted at any time after entry. Any edits or deletions to information that has already been disclosed will require the submission of an amendment.

1. Click on **Communications & Expenditures** in the side bar and search for the communication by **Candidate/Proposal**, **Type**, or **Description** and click **Search**.

2. Click on the ✏️ **Edit** (if changing data) or ✖️ **Delete** button under the action menu for the **Communication**, **Expenditure**, or **Payment**.

3. If editing, make any necessary changes to the data and press save; if deleting, press **OK** on the confirmation popup.

- ♦ **NOTE:** If you are deleting multiple levels from the same communication, you must delete from bottom up (i.e., **Payment** then **Expenditure** then **Communication**).