

# INSTRUCTIONS FOR FILING THE 2010 ELECTRONIC ANNUAL REPORT



Help Desk

850-245-6280

OR

[efs@dos.state.fl.us](mailto:efs@dos.state.fl.us)

From Internet Explorer access the EFS at <https://efs.dos.state.fl.us>.

Enter your current **ID Number** (*this is not the 4 digit PIN number*).

Enter your confidential **Password**. (*IMPORTANT: Your password is case sensitive.*)

Click



The screenshot shows the login interface for the Campaign Finance Online Reporting System. At the top, it identifies the Florida Department of State and the Division of Elections, with the URL <http://www.dos.state.fl.us>. The page title is "Campaign Finance Online Reporting System" and includes an icon of a document with a clock. A warning message states: "This is a password protected area. Passwords are case sensitive. Please enter your user information below and click the 'Sign In' button." The login form contains two input fields: "Id Number" with the placeholder "XXXXXX" and "Password" with a masked field of seven dots. Below the fields are "Sign In" and "Recover password" buttons. The footer provides contact information for the Division of Elections, including the address (R.A. Gray Building, Room 316, 500 S. Bronough Street, Tallahassee, Florida 32399-0250), help desk phone number (850) 245-6240 (Monday to Friday, 8 a.m. - 5 p.m., 6 p.m. on Due Dates), election phone number (850) 245-6240, and email [efs@dos.state.fl.us](mailto:efs@dos.state.fl.us).

Click on **Filings** and select **Filed Reports**. Click on [Go To Annual Reports](#) at the bottom of the screen.

The table below lists all campaign finance treasurer reports that have been *Filed* with the Department of State, Division of Elections. Filed reports may not be edited, but may be amended.

Select a report for further editing by clicking on the Seq Number or place the cursor over the desired sequence number and press the right mouse button for further options.

Seq	Report Year	Election ID	Report Type	Date Filed	Complete Status	Amended	Items In Queue
<a href="#">3</a>	2008	20081104-GEN	Q4	12/31/2008	No Detail Records Found	N	0
<a href="#">2</a>	2007	20061107-GEN	Q4	12/31/2006	No Detail Records Found	N	0
<a href="#">1</a>	2006	20061107-GEN	Q4	12/31/2006	No Detail Records Found	N	0

[Go To Annual Reports](#)

Click on [2010](#).

The table below lists all annual reports that have been filed or need to be filed with the Division of Elections.

**The Q4 report must be filed before** the corresponding annual report will appear in the list.

Filed reports may not be edited, but may be amended.

Select a report for further editing by clicking on the Report Year.

Year	File Status	File Date
<a href="#">2010</a>	PEN	
<a href="#">2009</a>	FIL	01/06/2011
<a href="#">2008</a>	AMD	01/29/2009

**Note: The 2010 annual report will not be available for filing until the 2010 Q4 report is filed.**

## UPDATING INFORMATION

Click on **View** beside “**OFFICER LISTING.**” Print the document. The information on this document will be used to verify information that is currently on file with the Division. Information is updated by direct entry into the EFS and by uploading documents, depending on the information to be updated. Using this document, verify the information below and make changes as necessary.

Report: 2010 - AR - 1 Due: 1/31/2011	File Status <input type="checkbox"/> Amended Pending	Filed Date	Complete Status Pending	Reviewed On
<b>Step 1</b>				
<b>OFFICER LISTING:</b> <a href="#">Re-Generate</a> 1/6/2011 9:51:55 AM <a href="#">View</a>				
Committee Name: Pending Verification <input type="checkbox"/> Verified Committee Address & Phone New Committee Name: <input style="width: 100%;" type="text"/>				
Treasurer(s): Pending Verification <input type="checkbox"/> Verified All Treasurer's Address & Phone Chairperson: Pending Verification <a href="#">Get Changes Template</a> <input style="width: 100%;" type="text"/>				
Registered Agent: Pending Verification <a href="#">Get Agent Template</a> <input style="width: 100%;" type="text"/> <b>** Must have a signed copy on file. If uploaded document is not signed then FAX a signed copy to (850)245-6259 **</b>				
DS-DE 1 Information Form: <a href="#">Get Info Form Template</a> <a href="#">Upload Info Form</a> <input style="width: 100%;" type="text"/>				
ByLaws & Dues Assessment: Pending Verification or Document Upload <input style="width: 100%;" type="text"/>				
<a href="#">Go To Listing</a> <a href="#">Amend Rpt</a> <a href="#">Review</a> <a href="#">Save</a> <a href="#">Go To Finance</a>				Record Revised 41703 1/6/2011 9:51:55 AM

### COMMITTEE NAME:

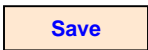
Committee Name: Pending Verification <input type="checkbox"/> Verified Committee Address & Phone
New Committee Name: <input style="width: 100%;" type="text"/>




**No Change** - If the name of the committee has not changed, click on the drop down box and select “Verified as accurate and complete.” Click on [Save](#).

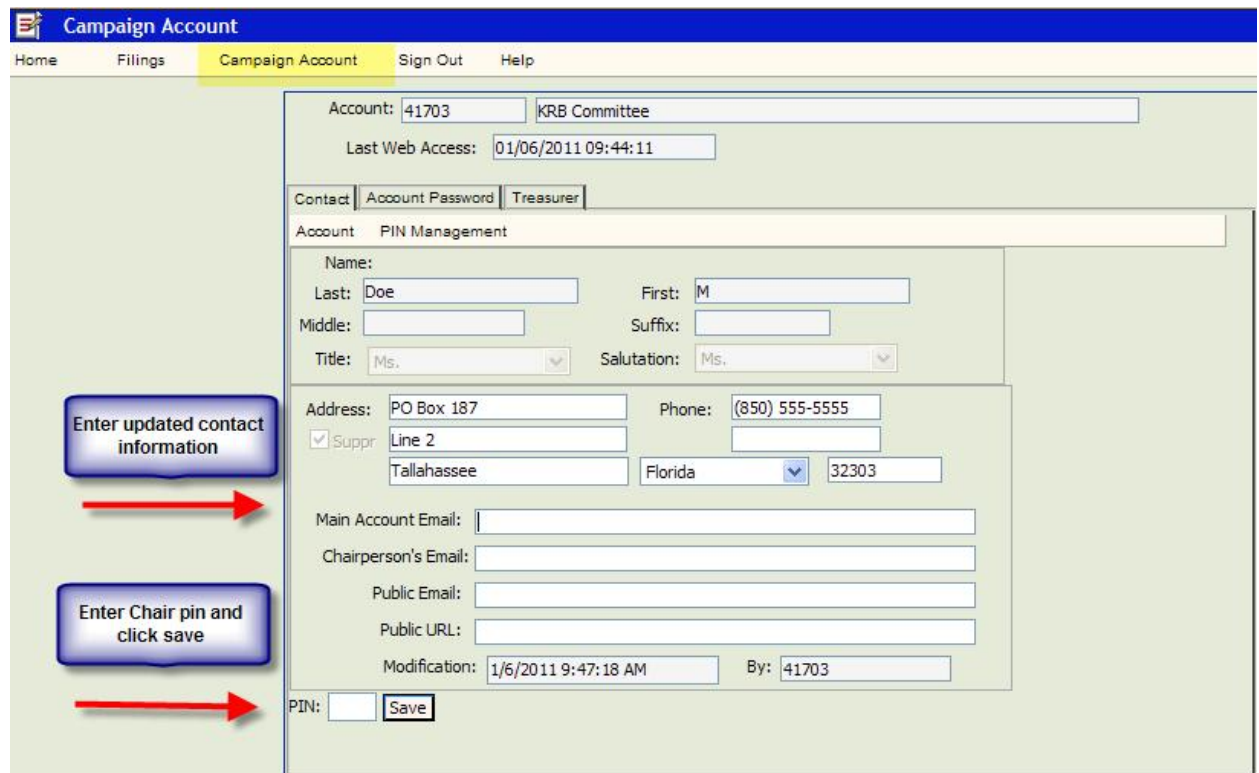
**Name Change** - To change the committee name, click on the drop down box and select “Name has changed.” Type the new name of the committee in the space provided. Click on [Save](#). **NOTE: If the name of the committee is changed, you must submit a new registered agent form. See the Registered Agent section below.**

**Spelling Correction** - To correct a spelling error in the name, click on the drop down box and select “Correct Spelling Error.” Type the corrected name of the committee in the space provided. Click on [Save](#).



## COMMITTEE ADDRESS AND TELEPHONE NUMBER:

**No Change** - Verify the committee address and telephone number from the “**OFFICER LISTING**” document. If the information has **not** changed, click  Verified All Treasurer’s Address & Phone and then click on .

**Update Contact Information** - If the address and/or telephone number of the committee has changed, click on  in the EFS toolbar. Enter the updated information. Enter the chairman’s pin at the bottom of the screen. Click on  and select .



The screenshot shows the "Campaign Account" web application interface. The top navigation bar includes "Home", "Filings", "Campaign Account", "Sign Out", and "Help". The main content area displays account details for "KRB Committee" with account number "41703" and a "Last Web Access" timestamp of "01/06/2011 09:44:11". Below this, there are tabs for "Contact", "Account Password", and "Treasurer". The "Contact" tab is active, showing fields for Name (Last: Doe, First: M, Middle, Suffix, Title: Ms., Salutation: Ms.), Address (PO Box 187, Line 2, Tallahassee, Florida, 32303), and Phone ((850) 555-5555). There are also fields for Main Account Email, Chairperson's Email, Public Email, and Public URL. A "Modification" timestamp of "1/6/2011 9:47:18 AM" and "By: 41703" is shown. At the bottom, there is a "PIN:" field and a "Save" button. Two blue callout boxes with red arrows point to the "Address" and "PIN:" fields, containing the text "Enter updated contact information" and "Enter Chair pin and click save" respectively.

(To return to the annual report screen, click on . Select  and then click on [Go To Annual Reports](#) at the bottom of the page. Click on [2010](#))

## TREASURER(S):

Treasurer(s):	<input type="text" value="Pending Verification"/>	<input type="checkbox"/> Verified All Treasurer's Address & Phone
Chairperson:	<input type="text" value="Pending Verification"/>	<input type="button" value="Get Changes Template"/>
		<input type="text" value="12/27/2008 2:48:31 PM"/> <input type="button" value="View"/>

**No Change** - If the treasurer(s) has **not** changed, click on the drop down box and select "Verified as accurate and complete." Click on .

**New Treasurer/Deputy or Remove Deputy Treasurer** - If the committee has designated a new treasurer or deputy treasurer(s) **or** removed a deputy treasurer, click on the drop down box and select "Information has changed." Click on . This information will be updated by adding it to the [Changes Template](#). Click on  to open the document. Fill in the information for the new treasurers or removed deputy treasurer and save your changes to the computer. Close document after saving.

## TREASURER(S) ADDRESS AND TELEPHONE NUMBER

**No Change** - Verify the contact information for the treasurer and any deputy treasurers. If all information is correct, click  Verified All Treasurer's Address & Phone and then click on .

**Update Contact Information** - If the address and/or telephone number of the treasurer or deputy treasurer(s) has changed, click on  in the EFS toolbar. Click on the  and click on the drop-down box to select the name of the treasurer or deputy treasurer. Enter the updated information. Enter the chairperson's pin at the bottom of the screen. Click on  and select . [See screen shot on page 4.](#)

**(NOTE:** To return to the annual report screen, click on . Select  and then click on [Go To Annual Reports](#) at the bottom of the page. Click on [2010.](#))

Click  Verified All Treasurer's Address & Phone and then click on .

**CHAIRPERSON:**

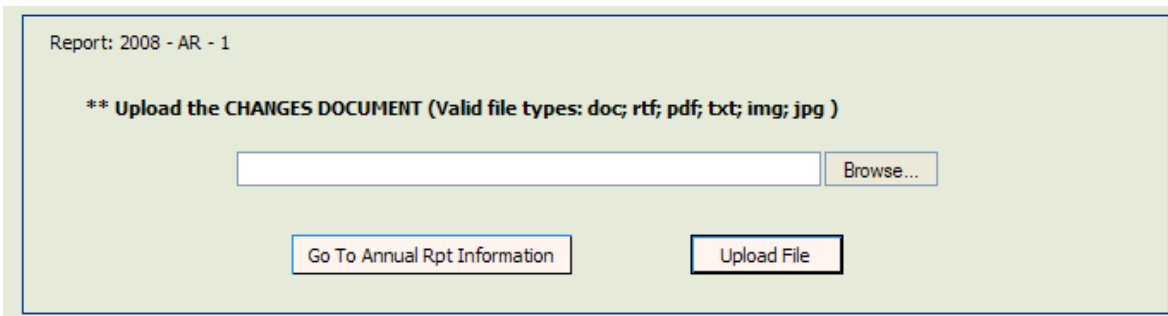
**No Change:** If the chairperson has not changed, click on the drop down box and select “Verified as accurate and complete.” Click on .

**Address Change for Current Chairperson:** If the address for the current chairperson has changed, this information will be updated by adding it to the [Changes](#) document. If you have not previously opened this document, click on [Get Changes Template](#). If you previously added information to the document, retrieve the saved copy of the document. Fill in the new contact information for the current chairperson. Save and close the document.

**New Chairperson:** If the committee has designated a new chairperson, click on the drop down box and select “Information has changed.” Click on . This information will be updated by adding it to the [Changes](#) document. If you have not previously opened this document, click on [Get Changes Template](#). If you previously added information to the document, retrieve the saved copy of the document. Fill in the information for the new chairperson. Save the document to your computer and close the document.

**UPLOAD [CHANGES](#) DOCUMENT:**

To upload information provided in the [Changes](#) document, click on .

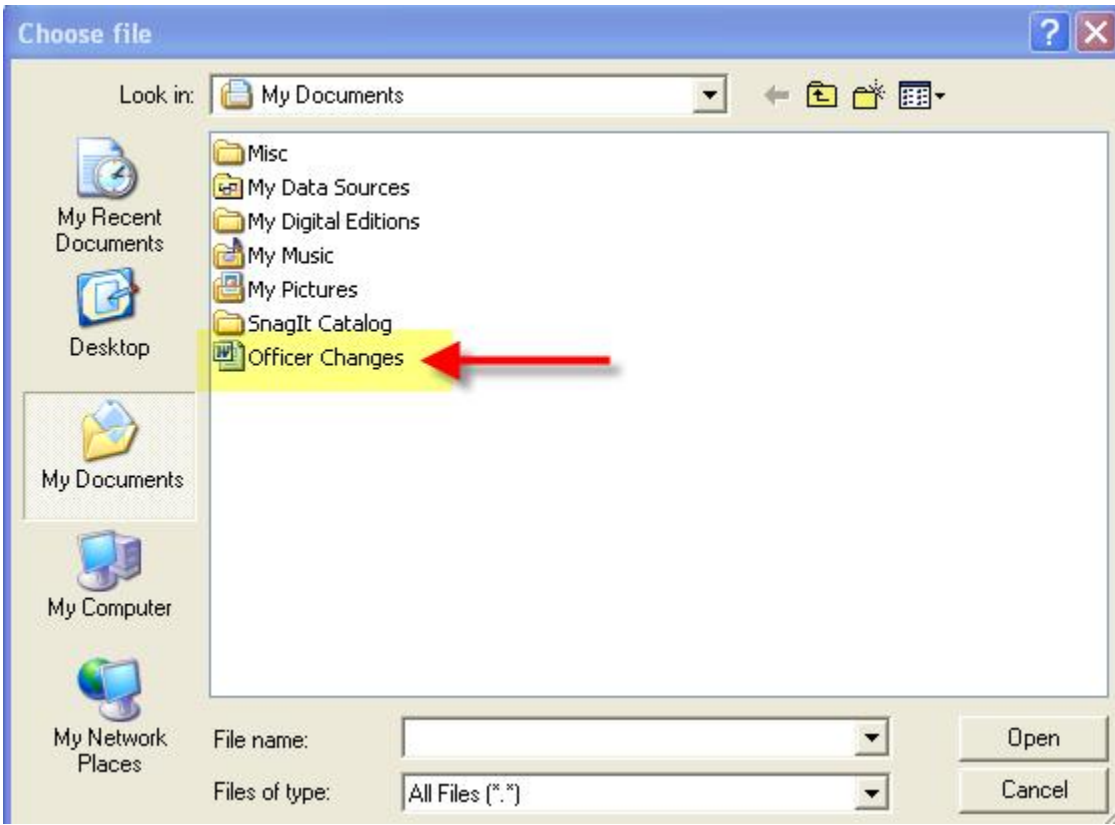


The screenshot shows a web interface with a light green background. At the top left, it says "Report: 2008 - AR - 1". Below that, there is a bold instruction: "\*\* Upload the CHANGES DOCUMENT (Valid file types: doc; rtf; pdf; txt; img; jpg )". Underneath the instruction is a text input field followed by a "Browse..." button. At the bottom of the interface, there are two buttons: "Go To Annual Rpt Information" and "Upload File".

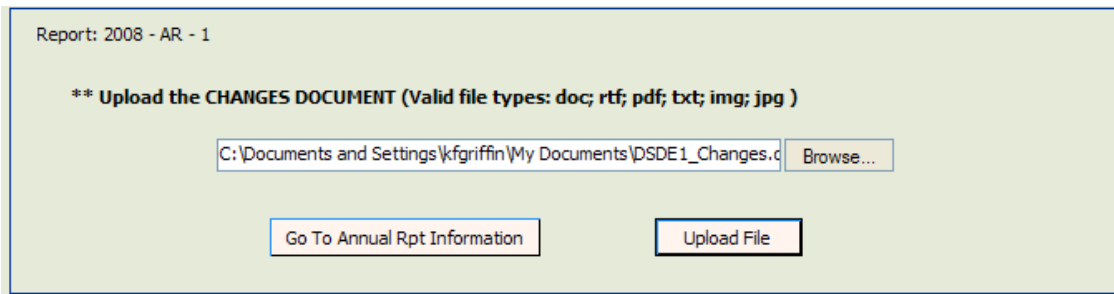
Click on .

Select the Officer\_Changes.doc document from your computer and click on

**Open**



Click on **Upload File**



Click on **View** to see the information that has been uploaded. If necessary, the document can be changed and uploaded again.

## REGISTERED AGENT:

Registered Agent: <input type="text" value="Information has changed"/> <input type="button" value="Get Agent Template"/> <input type="button" value="Upload Reg. Agent"/> <input type="text"/>
<b>** Must have a signed copy on file. If uploaded document is not signed then FAX a signed copy to (850)245-6259 **</b>

**No Change:** If the registered agent/office has not changed, click on the drop down box and select "Verified as accurate and complete." Click on .

**You do not need to file/upload the registered agent form if there are no changes.**

### Change(s):

**New Registered Agent, Address or Committee Name Change** - If the registered agent/office has changed or the name of the committee has changed, click on the drop down box and select "Information has changed." Click on .

Click on [Get Agent Template](#) to open the document. Once complete, save the document to your computer. **The registered agent and the chairman must sign the document in order to process the change.**

**A signed copy of the registered agent form may be uploaded to the EFS by scanning and saving it to your computer.** If you can not upload a signed copy of the registered agent form an unsigned copy may be uploaded and the signed hard copy mailed to the Division of Elections. Registered Agent forms may also be faxed to (850) 245-6259.

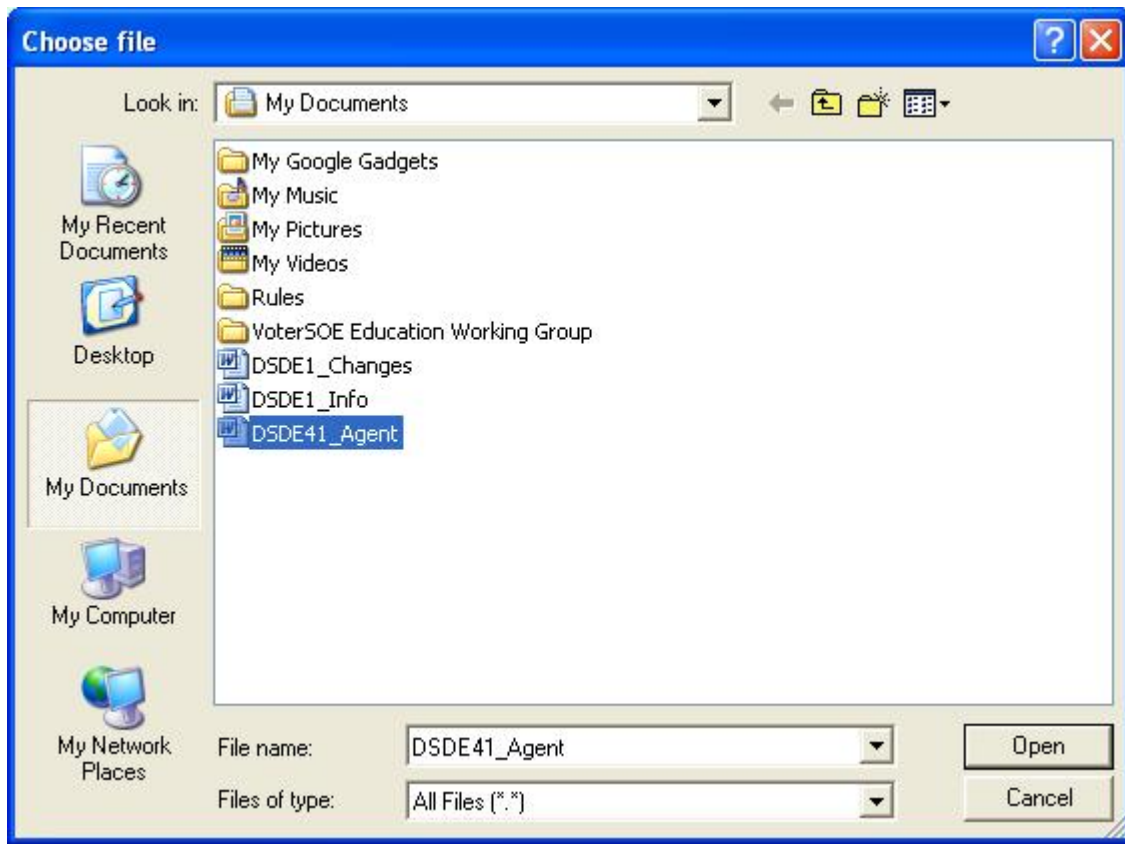
## UPLOAD [AGENT](#) DOCUMENT:

To upload the [Agent](#) document, click on .

Click on .

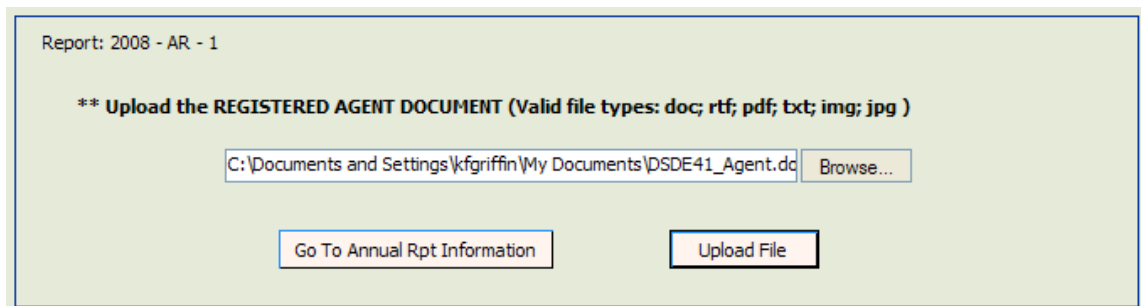
Report: 2008 - AR - 1
<b>** Upload the REGISTERED AGENT DOCUMENT (Valid file types: doc; rtf; pdf; txt; img; jpg )</b>
<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Go To Annual Rpt Information"/> <input type="button" value="Upload File"/>

Select the DSDE41\_Agent.doc (or the signed scanned copy) document from your computer.



Click on .

Click on .



Click on **View** to see the information that has been uploaded. If necessary, the document can be changed and uploaded again.

## DS-DE 1 INFORMATION FORM:

DS-DE 1 Information Form: [Get Info Form Template](#) [Upload Info Form](#) 12/27/2008 2:29:10 PM [View](#)

Click on the [Get Info Form Template](#). Fill in the required information. **All information must be provided.** (If not applicable, please indicate this by typing "Not applicable" or NA.) Save the DS-DE1\_Info form to your computer for upload.

To upload the [Info Form](#), click on [Upload Info Form](#).

Report: 2008 - AR - 1

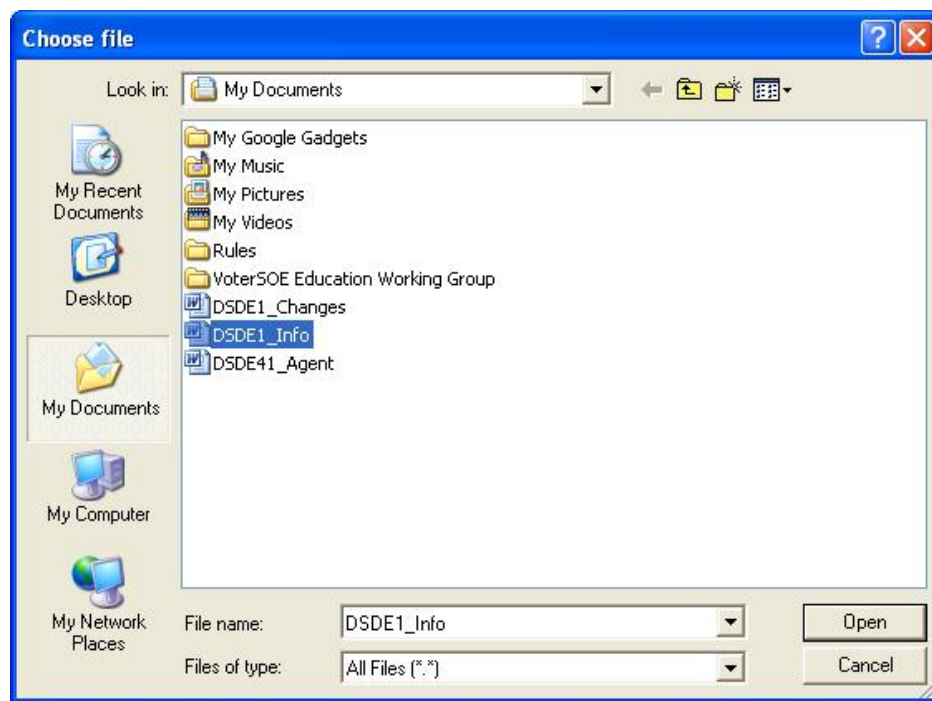
**\*\* Upload the INFORMATION DOCUMENT (Valid file types: doc; rtf; pdf; bct; img; jpg )**

[Browse...](#)

[Go To Annual Rpt Information](#) [Upload File](#)

Click on [Browse](#).

Select the DSDE1\_Info.doc document from your computer and click on [Open](#).



Click on [Upload File](#).

Report: 2008 - AR - 1

**\*\* Upload the INFORMATION DOCUMENT (Valid file types: doc; rtf; pdf; txt; img; jpg )**

C:\Documents and Settings\kgriffin\My Documents\DSDE1\_Info.doc [Browse...](#)

[Go To Annual Rpt Information](#) [Upload File](#)

Florida Department of State, Division of Elections, 2008

Click on [View](#) to see the information that has been uploaded. If necessary, the document can be changed and uploaded again.

### BY-LAWS AND DUES ASSESSMENTS:

ByLaws & Dues Assessment: [Pending Verification or Document Upload](#) [1/16/2009 3:19:12 PM](#) [View](#)

Select “Verified No Change has occurred,” if **NO** changes have been made to the charter or bylaws since the last filing. **If this is the committee’s first time filing an annual report, you will be required to upload the bylaws and dues schedule.**

Click on the drop-down list next to “By-Laws & Dues Assessments” and select one of the options. Click on [Save](#).

ByLaws & Dues Assessment: [Separate in two documents](#)

Select the option that applies

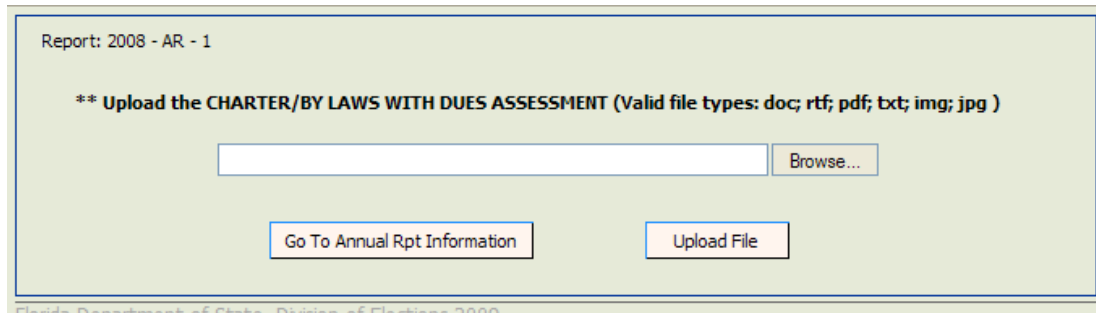
[Go To Listing](#) [Ant](#) [50](#)

To upload the document, click on [Upload ByLaws](#).

ByLaws & Dues Assessment: [Separate in two documents](#) [Upload ByLaws](#) [1/6/2011 10:41:02 AM](#) [View](#)

[Upload Dues](#) [1/6/2011 10:41:08 AM](#) [View](#)

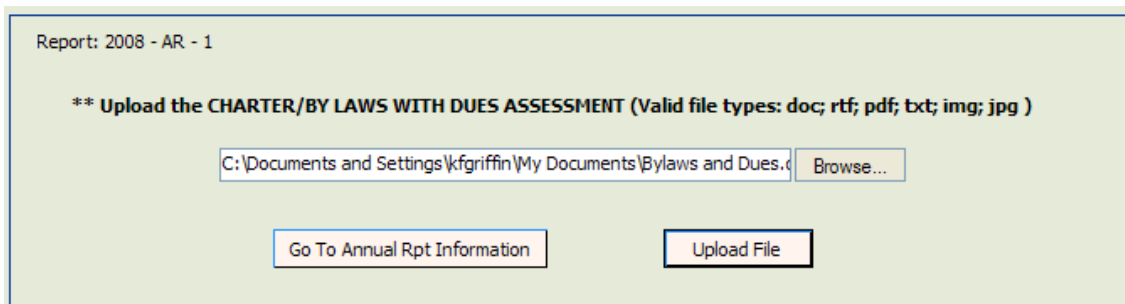
Click on **Browse**.



Select the document from your computer (Screen shot) and click on **Open**.



Click on **Upload File**.



If you selected the option of having the by-laws and the assessment schedule in separate documents, repeat the up-loading process for the second document.

Click on **View** to see the information that has been uploaded. If necessary, the document(s) can be changed and uploaded again.

### Review and Error Messages

Click on Review at the bottom of the page. Any applicable error message will appear in red in the top right hand corner of the screen. **Note: The system will not allow you to proceed to the Financial Statement until all information is entered and uploaded in this portion of the report.**

**\*\*Missing New Name** – the report indicates that the name has changed or corrected, but the new name is not provided

**\*\*Missing Verification** – one of the verification boxes has not been checked. Click on the box and then click on Save.


**\*\*Missing Upload File(s)** – if this error appears, one or more of the required documents have not been uploaded.

After you correct the errors, click on Save and then Review.

Below is an example of what the first screen of the annual report will look like once completed:

Report: 2010 - AR - 1 Due: 1/31/2011	File Status <input type="checkbox"/> Amended Pending	Filed Date	Complete Status Complete	Reviewed On 1/6/2011 10:41:15 AM
<b>OFFICER LISTING:</b> <span style="border: 1px solid black; padding: 2px 5px;">Re-Generate</span> 1/6/2011 9:51:55 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span>				
Committee Name: Verified name as accurate and c <span style="border: 1px solid black; padding: 2px 5px;">v</span> <input checked="" type="checkbox"/> Verified Committee Address & Phone New Committee Name: <input style="width: 50%;" type="text"/>				
Treasurer(s): Information has changed <span style="border: 1px solid black; padding: 2px 5px;">v</span> <input checked="" type="checkbox"/> Verified All Treasurer's Address & Phone Chairperson: Information has changed <span style="border: 1px solid black; padding: 2px 5px;">v</span> <span style="border: 1px solid black; padding: 2px 5px;">Get Changes Template</span> <span style="border: 1px solid black; padding: 2px 5px;">Upload Changes</span> 1/6/2011 10:20:03 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span>				
Registered Agent: Information has changed <span style="border: 1px solid black; padding: 2px 5px;">v</span> <span style="border: 1px solid black; padding: 2px 5px;">Get Agent Template</span> <span style="border: 1px solid black; padding: 2px 5px;">Upload Req. Agent</span> 1/6/2011 10:40:25 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span> <b>** Must have a signed copy on file. If uploaded document is not signed then FAX a signed copy to (850)245-6259 **</b>				
DS-DE 1 Information Form: <span style="border: 1px solid black; padding: 2px 5px;">Get Info Form Template</span> <span style="border: 1px solid black; padding: 2px 5px;">Upload Info Form</span> 1/6/2011 10:40:36 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span>				
ByLaws & Dues Assessment: Separate in two documents <span style="border: 1px solid black; padding: 2px 5px;">v</span> <span style="border: 1px solid black; padding: 2px 5px;">Upload ByLaws</span> 1/6/2011 10:41:02 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span> <span style="border: 1px solid black; padding: 2px 5px;">Upload Dues</span> 1/6/2011 10:41:08 AM <span style="border: 1px solid black; padding: 2px 5px;">View</span>				
<span style="border: 1px solid black; padding: 2px 5px;">Go To Listing</span> <span style="border: 1px solid black; padding: 2px 5px;">Amend Rpt</span> <span style="border: 1px solid black; padding: 2px 5px;">Review</span> <span style="border: 1px solid black; padding: 2px 5px;">Save</span> <span style="border: 1px solid black; padding: 2px 5px;">Go To Finance</span>				Record Revised 41703 1/6/2011 10:41:15 AM

## Financial Statement

At the bottom of the screen, click on .

### Financial Statement Screen:

Report: 2010 - AR - 1	File Status	Filed Date	Complete Status	Reviewed On
Due: 1/31/2011	<input type="checkbox"/> Amended	Pending	Complete	1/6/2011 10:50:12 AM
<b>Financial Statement</b>	1	Pending		

Beginning Balance:	0.00	Ending Balance:	0.00
INCOME		EXPENSES	
Membership dues or Assessments:	500.00	Contributions to Can/Com:	0.00
Contributions:	500.00	Office expenses & Operating cost:	0.00
Interest on Accounts:	0.00	Administrative costs (if any):	0.00
Other (refunds, etc):	0.00	Other:	0.00
Inkind:	0.00		
Total from Treasurer Rpts:	1,000.00		
Dues from Treasurer Rpts:	500.00		
Interest from Treasurer Rpts:	0.00		
Inkind from Treasurer Rpts:	0.00		

Report Totals pulled on: 1/6/2011 10:50:12 AM

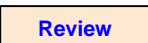
The grayed out figures reflect what was reported in 2010. If these totals do not reflect what you have to report on the financial statement then you will need to review the 2010 filed reports and amend if necessary.

Record Revised 41703  
1/6/2011 10:50:12 AM

Enter Chair PIN to File Rpt:


Enter the data in the Financial Statement and click on .

### REVIEW AND ERROR MESSAGES

Click on  at the bottom of the page. Any applicable error message will appear in red in the top right hand corner of the screen.

**\*\*Totals Do Not Reconcile** – Information pulled from the reports filed in the previous year do not equal the amounts entered in the financial statement. These amounts must be the same.

**\*\*Dues are not 25% of Total** – Membership dues do not equal at least 25% of the contribution received during the year.

After you correct the errors, click on .

## FILE REPORT

At the bottom left hand corner of the Financial Statement, enter the chairperson's pin and click on [File Rpt.](#)

Enter Chair PIN to File Rpt:  [File Rpt](#)

To print the receipt, click on [Print Receipt](#). Click on [Go To Listing](#). If the annual report has been filed, the File Status will show "FIL."

The table below lists all annual reports that have been filed or need to be filed with the Division of Elections.

The **Q4 report must be filed before** the corresponding annual report will appear in the list.

Filed reports may not be edited, but may be amended.

Select a report for further editing by clicking on the Report Year.

	Year	File Status	File Date
	<a href="#">2009</a>	FIL	01/13/2010
	<a href="#">2008</a>	FIL	01/17/2009

**Help Desk**

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