

## C-SMART HELP

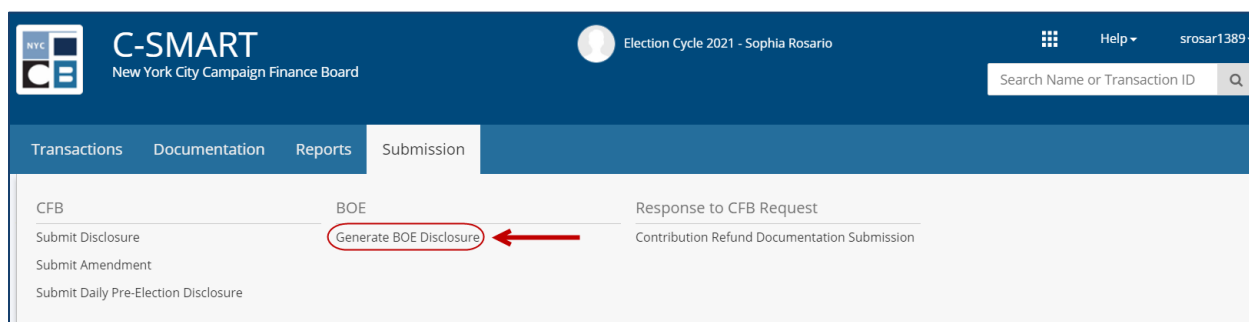
### ➤ **BOE SUBMISSION**

Use C-SMART to generate your periodic disclosure statements for the New York State Board of Elections (BOE), including off-cycle reports that do not correspond to any specific filing period.

## HOW TO SUBMIT DISCLOSURE TO THE BOE

### 1. GO TO GENERATE BOE DISCLOSURE

➤ Hover your cursor over **Submission** and click **Generate BOE Disclosure**.



### 2. ENTER YOUR FILING DETAILS

➤ Complete the following fields:

- ◆ **Filing Period:** Select the reporting period you are submitting a statement for from the drop-down menu.
- ◆ **Committee:** If your campaign has more than one CFB committee, select the applicable committee.
- ◆ **Filer ID# and PIN:** Enter the filer ID and PIN assigned to you by the NYS BOE.
- ◆ **Filing Type:** If this is your first filing for a reporting period, select **Standard**. If you are amending a report you have already previously submitted, select **Amendment**.
- ◆ **Off-Cycle:** If you are submitting an off-cycle report, or its subsequent disclosure report, see [How To Generate an Off-Cycle Report](#) below.

- **Unitemized Amounts** and **Initial Summary Information** only rarely apply to campaigns. If you are unsure whether they apply, consult your Candidate Services liaison before entering any information.
- Then, click **Next**.
- **Important:** If you need to file a No-Activity Report, 24-Hour Notice, or In-Lieu-Of Statement, use the links underneath **BOE Non-Itemized Report & Notifications**. C-SMART will not allow you to generate a report for a period in which you had no activity.

Transactions Documentation Reports Submission

BOE Disclosure ⓘ

1 Select a Filing Period 2 Review Draft 3 Generate BOE File

Next →

\*Filing Period: 07/16/2018 - July 2018 Periodic  
\*Filer ID#: C12345

\*Committee: Sophia for Council  
\*PIN: 12345678

\*Filing Type:  Standard  Amendment

Unitemized Amounts

Initial Summary Information

**Report Period Codes (BOE File Name)**  
A - 32 day Pre-Primary  
B - 11 day Pre-Primary  
C - 10 day Post-Primary  
D - 32 day Pre-General  
E - 11 day Pre-General  
F - 27 day Post-General  
J - January Periodic  
K - July Periodic

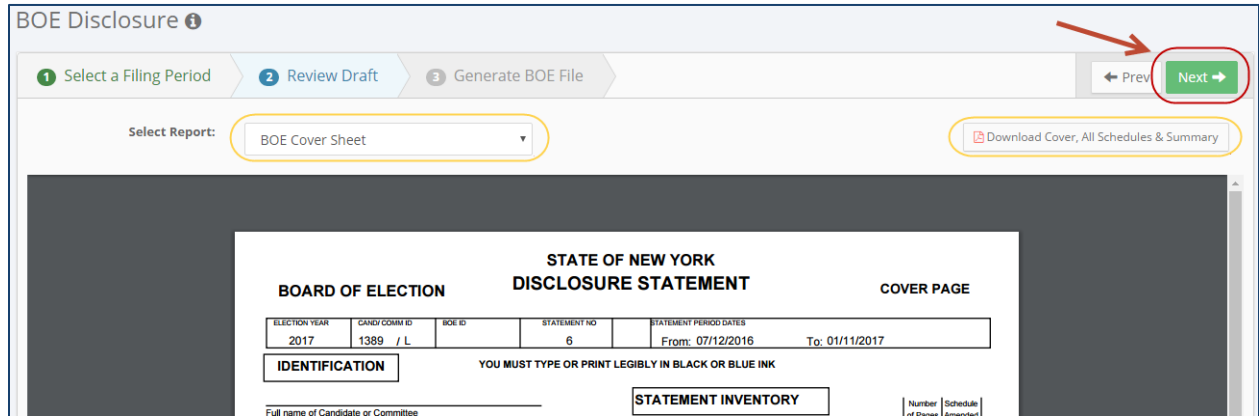
**BOE Non-Itemized Report & Notifications**  
[No-Activity Report](#)  
[24-Hour Notice](#)  
[In-Lieu-Of Statement](#)

### 3. REVIEW YOUR DRAFT

- C-SMART will preview the BOE Cover Sheet. To view a specific set of transactions, use the drop-down menu to select a particular schedule. Each schedule contains different categories of transactions (e.g. contributions, expenditures, etc.).
- If you wish to print and/or save the Cover Sheet, Summary and all schedules, click **Download Cover, All Schedules & Summary**. Or, if you want to print and/or save any particular transaction types, select the schedule from the drop-down menu and use the print and save functions in your browser.
- When you are ready to submit, click **Next**.

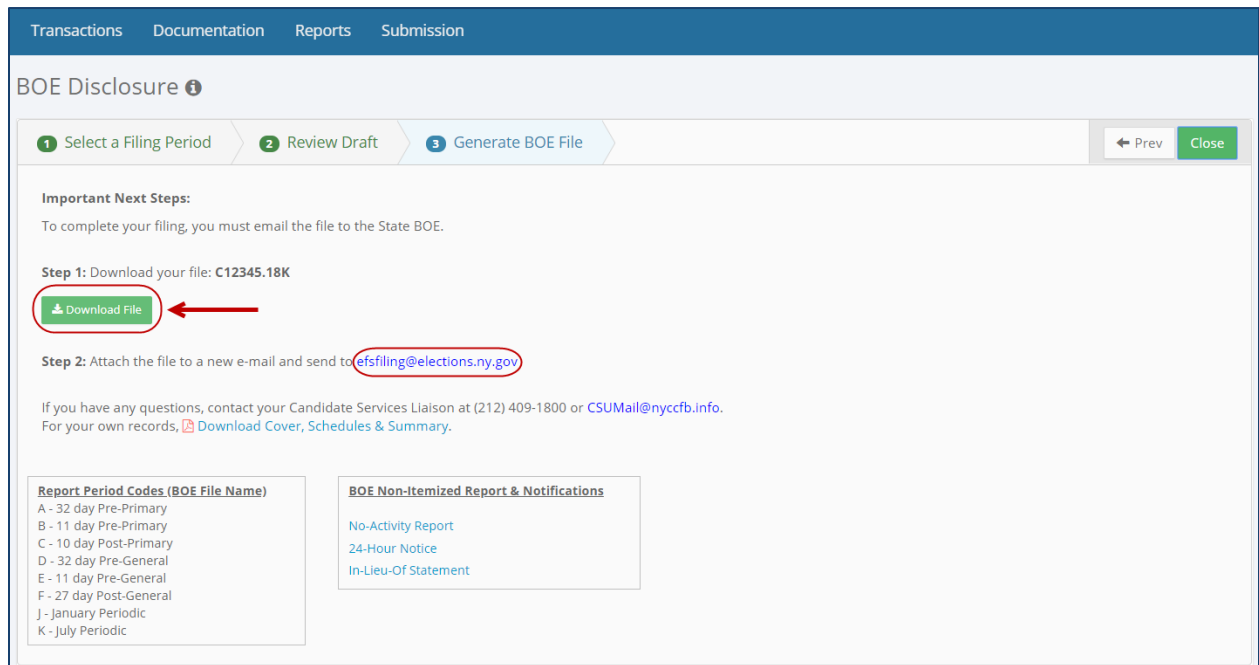
✓ **Best Practice:**

- ◆ Carefully review your draft and compare the information to the campaign’s bank and other records to ensure the information is complete and accurate.



#### 4. DOWNLOAD AND SUBMIT YOUR FILE TO THE BOE

- Click **Download File** and save the file to where your browser places automatic downloads. Do not open the file. It can only be opened by the BOE and may become corrupted if opened. Once saved, send the file as an attachment via email to [efsfiling@elections.ny.gov](mailto:efsfiling@elections.ny.gov). Click **Close** once you have completed your submission.

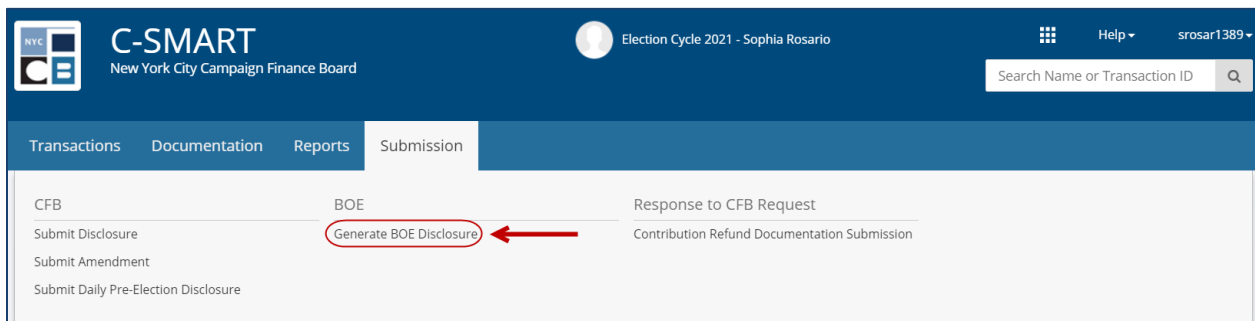


## HOW TO GENERATE AN OFF-CYCLE REPORT

An off-cycle report is a report that does not correspond to any specific filing period. You may need to generate an off-cycle report for a Resignation or Termination Request to the BOE, or if you need to submit a report for the next filing period following an off-cycle report.

### 1. GO TO GENERATE BOE DISCLOSURE

- Hover your cursor over **Submission** and click **Generate BOE Disclosure**.



### 2. ENTER YOUR FILING DETAILS

- Complete the following required fields:
  - ◆ **Filing Period:** Select the reporting period that includes the last date of financial activity for the off-cycle report. You will need to generate the off-cycle report first, even if you are only using this feature to submit the next disclosure report.
  - ◆ **Committee:** Select the applicable committee.
  - ◆ **Filer ID# and PIN:** Enter the filer ID and PIN provided to you by the NYS BOE.
  - ◆ **Filing Type:** If you are filing this off-cycle report for the first time, select **Standard**. If you are amending a previously filed off-cycle report, select **Amendment**.
- Then, click **Off-Cycle** to continue and complete the following:
  - ◆ **End Date of Off-Cycle Report:** Enter or select the last date of financial activity for the off-cycle report. C-SMART will generate a table that will include the end date for any previously generated off-cycle reports.
  - ◆ **Committee:** If your campaign has more than one CFB committee, select the applicable committee.

- **Unitemized Amounts** and **Initial Summary Information** only rarely apply to campaigns. Consult your Candidate Services liaison before entering any information.
- Once finished, click **Next**.

Transactions Documentation Reports Submission

BOE Disclosure ⓘ

1 Select a Filing Period 2 Review Draft 3 Generate BOE File

← Prev Next →

\*Filing Period: 07/16/2018 - July 2018 Periodic

\*Filer ID#: C12345

\*Committee: Sophia for Council

\*PIN: 12345678

\*Filing Type:  Standard  Amendment

Off-Cycle

**Contact your Candidate Services Liaison before generating this file.**

An Off-Cycle Report should be run when the campaign has to submit a report to the BOE that does not correspond to a specific filing period. To begin, select the filing period above and enter your BOE filer ID and PIN. Then, next to "End Date of Off-Cycle Report", enter the last date of financial activity for the off-cycle report or the first date of financial activity for the next filing period. The campaign will need to use this feature when submitting the next filing period, as well as for any amendments for the off-cycle report or the next filing period.

End Date of Off-Cycle Report: 06/20/2018

\*Off-Cycle Filing Type:  Standard  Amendment

Previously Run Off-Cycle Files :

Start Date	End Date	Run Date	Filing Type
01/12/2016	05/09/2016	07/12/2018	Standard

Unitemized Amounts >

Initial Summary Information >

**Report Period Codes (BOE File Name)**

A - 32 day Pre-Primary  
 B - 11 day Pre-Primary  
 C - 10 day Post-Primary  
 D - 32 day Pre-General  
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 F - 27 day Post-General  
 J - January Periodic  
 K - July Periodic  
 L - Off Cycle

**BOE Non-Itemized Report & Notifications**

[No-Activity Report](#)  
[24-Hour Notice](#)  
[In-Lieu-Of Statement](#)

### 3. REVIEW YOUR DRAFT

- C-SMART will preview the BOE Cover Sheet for the off-cycle report. To view a specific set of transactions, use the drop-down menu to select a particular schedule. Each schedule contains different categories of transactions (e.g. contributions, expenditures, etc.).
- If you want to print and/or save the Cover Sheet, Summary and all schedules, click **Download Cover, All Schedules & Summary**. Or, if you wish to print and/or save any particular transaction types, select the schedule from the drop-down menu and use the print and save functions in your browser.
- When you are ready to submit, click **Next**.

✓ **Best Practice:**

- ◆ Carefully review the draft before submitting the final statement and compare the information to the campaign's bank and other records to ensure the information is complete and accurate.

BOE Disclosure

1 Select a Filing Period 2 Review Draft 3 Generate BOE File

Select Report: BOE Cover Sheet

Download Cover, All Schedules & Summary

← Prev Next →

STATE OF NEW YORK  
BOARD OF ELECTION DISCLOSURE STATEMENT COVER PAGE

ELECTION YEAR	CANDY/COMM ID	BOE ID	STATEMENT NO	STATEMENT PERIOD DATES
2017	1389 / L		6	From: 07/12/2016 To: 01/11/2017

IDENTIFICATION YOU MUST TYPE OR PRINT LEGIBLY IN BLACK OR BLUE INK

Full name of Candidate or Committee

STATEMENT INVENTORY

Number of Pages Schedule Attached


#### 4. DOWNLOAD AND SUBMIT THE OFF-CYCLE REPORT TO THE BOE

- If you are only using this feature to file the *next disclosure report*, skip this step. Click **Continue** to proceed.
- If you are using this feature to file the *off-cycle report*, click **Download File** and save the off-cycle report to where your browser places automatic downloads. Do not open the file. It can only be opened by the BOE and may become corrupted if opened. Once saved, send the file as an attachment via email to [efsfiling@elections.ny.gov](mailto:efsfiling@elections.ny.gov). Click **Close** once you have completed your submission and if you do not need to file the next disclosure report. If you do need to file that report, click **Continue**.
- **Important:** When it comes time to file the next disclosure report, you will have to generate the corresponding off-cycle report first. If you need to amend the off-cycle report, you will need to select **Amendment** as the filing type.


BOE Disclosure ⓘ

1 Select a Filing Period   2 Review Draft   3 Generate BOE File   ← Prev   Close

**Important Next Steps:**  
To complete your filing, you must email the file to the State BOE.

**Step 1:** Download your file: C12345.18L  


**Step 2:** Attach the file to a new e-mail and send to [efsfilings@elections.ny.gov](mailto:efsfilings@elections.ny.gov)

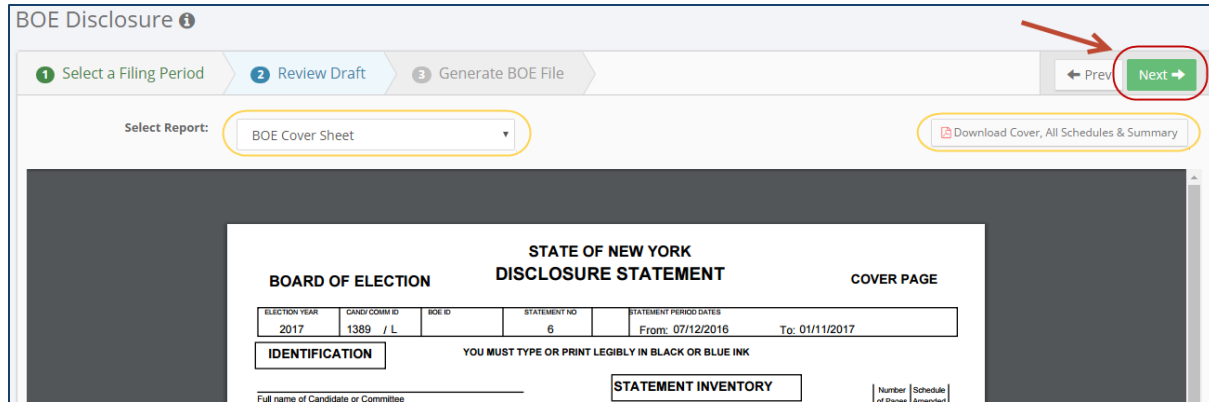
**Step 3:** Click Continue to generate your 07/16/2018 - July 2018 Periodic filing. If the campaign does not have to file the periodic at this time, click Close. When it comes time to file your periodic disclosure, the campaign will have to run the Off-Cycle report.  


If you have any questions, contact your Candidate Services Liaison at (212) 409-1800 or [CSUMail@nycfb.info](mailto:CSUMail@nycfb.info).  
For your own records, [Download Cover, Schedules & Summary](#).

Report Period Codes (BOE File Name)	BOE Non-Itemized Report & Notifications
A - 32 day Pre-Primary	No-Activity Report
B - 11 day Pre-Primary	24-Hour Notice
C - 10 day Post-Primary	In-Lieu-Of Statement
D - 32 day Pre-General	
E - 11 day Pre-General	
F - 27 day Post-General	
J - January Periodic	
K - July Periodic	
L - Off Cycle	

## 5. REVIEW YOUR DRAFT FOR THE NEXT DISCLOSURE PERIOD

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- When you are ready to submit, click **Next**.
- ✓ **Best Practice:**
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- **Important:** When you need to amend this disclosure statement, you will need to repeat this process and select **Amendment** as the filing type.

