

C-SMART HELP

FORGIVEN LOANS

HOW TO ADD A FORGIVEN LOAN

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Smith, Mary A **Employer:**
Address: 886 Gates Avenue 11 **Occupation:** Retired
Brooklyn NY 11221 **Address:**
Boro: Brooklyn Individual

Totals

Total Contributions: \$0.00 [View](#)
Total Loans: \$500.00
Total Repayments: \$0.00
Total Forgiven: \$0.00

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8397	2/4/2019	\$500.00	(\$0.00)	(\$0.00)	\$500.00

OR

NYC C-SMART Election Cycle 2021 - Sophia Rosario Help srosar1389

New York City Campaign Finance Board

Transactions Documentation Reports Submission

8397

Add Name

8397 -- Loan

2. Click **Add Forgiven**.

Loan Forgiven

Transaction ID	Forgiven Date	Amount
No records		

3. Enter and save the forgiven loan's details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Forgiven Date:** Enter the date the lender forgave the loan.
 - ◆ **Amount:** Enter the amount forgiven.
 - ◆ **Notes:** Enter any additional information about this transaction. The CFB cannot review this field. Your notes will be saved across all related transactions.
- Then, click Save.

Enter Details Loan Date: 2/4/2019 Loan Amount: \$500.00

*Forgiven Date: 02/04/2019

*Amount: \$500.00

Notes:
[For Campaign Use Only]

➔ Save Cancel

4. The forgiven amount has been successfully saved.

✔ Your transaction has been successfully saved.

Loan ← Back to Smith, Mary A

Transaction ID: 8397 Statement: N/A + Add Edit Delete

Profile		Totals	
Name:	Smith, Mary A	Total Contributions:	\$500.00 View
Address:	886 Gates Avenue 11 Brooklyn NY 11221	Total Loans:	\$500.00
Boro:	Brooklyn Individual	Total Repayments:	\$0.00
Employer:		Total Forgiven:	\$500.00
Occupation:	Retired		
Address:			

- Once you hit **Save**, C-SMART will return you to the **Loans** page. The **Totals** box and the list of loans will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on any related documentation, including the copy of the loan forgiven letter.

Important: Forgiven loans are considered contributions and count against the lender's contribution limit.

HOW TO EDIT A FORGIVEN LOAN

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID**, scroll down to **Loans Forgiven**, click the **gear** and then **Edit Loan Forgiven**. You can also use the **Search Name or Transaction ID** bar.

Loan ⓘ Back to Loans

Search by Last Name or Entity Name

Profile

Name: Smith, Mary A Employer:
Address: 886 Gates Avenue 11 Occupation: Retired
Brooklyn NY 11221 Address:
Boro: Brooklyn Individual

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$500.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$500.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding	
8397	2/4/2019	\$500.00	(\$0.00)	(\$500.00)	\$0.00	<input type="button" value="⚙"/>

Loan Forgiven

Transaction ID	Forgiven Date	Amount	
8398	2/4/2019	\$500.00	<input type="button" value="⚙"/>

OR

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New York City Campaign Finance Board

Transactions Documentation Reports Submission

8398

Add Name

8398 -- Loan Forgiven

2. Modify the necessary fields and click **Save**.

Edit Forgiven Details Loan Date: 2/4/2019 Amount: \$500.00

*Forgiven Date: 02/04/2019

*Amount: \$250.00

Notes: [For Campaign Use Only]

Entered By: srosar1389 Date: 02/04/2019 04:59 PM Updated By: srosar1389 Date: 02/04/2019 04:59 PM

3. The forgiven loan has been successfully edited.

✓ Your transaction has been successfully saved.

Loan
Transaction ID: 8397 Statement: N/A

Back to Smith, Mary A

+ Add Edit Delete

Profile

Name:	Smith, Mary A	Employer:	Retired
Address:	886 Gates Avenue 11 Brooklyn NY 11221	Occupation:	Retired
Boro:	Brooklyn Individual	Address:	

Totals

Total Contributions:	\$250.00	View
Total Loans:	\$500.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$250.00	

Important: The timestamp at the bottom will be updated to show who last modified the transaction.

HOW TO DELETE A FORGIVEN LOAN

- Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID**, scroll down to **Loans Forgiven**, click the **gear** and then **Edit Loan Forgiven**. You can also use the **Search Name or Transaction ID** bar..

Loan **i** Back to Loans

Search by Last Name or Entity Name

Profile

Name:	Smith, Mary A	Employer:	Retired
Address:	886 Gates Avenue 11 Brooklyn NY 11221	Occupation:	Retired
Boro:	Brooklyn Individual	Address:	

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$500.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$500.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8397	2/4/2019	\$500.00	(\$0.00)	(\$500.00)	\$0.00

Loan Forgiven

Transaction ID	Forgiven Date	Amount
8398	2/4/2019	\$250.00

OR

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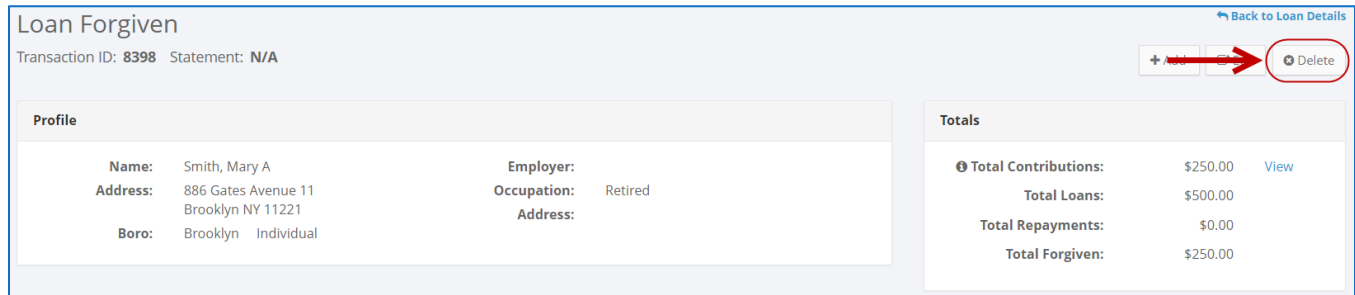
8398

Add Name

8398 -- Loan Forgiven

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.



Loan Forgiven
Transaction ID: 8398 Statement: N/A

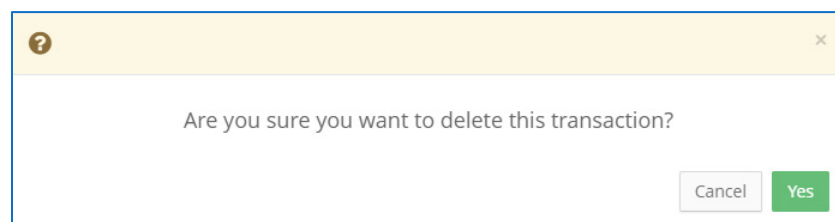
Back to Loan Details

+ Add Edit Delete

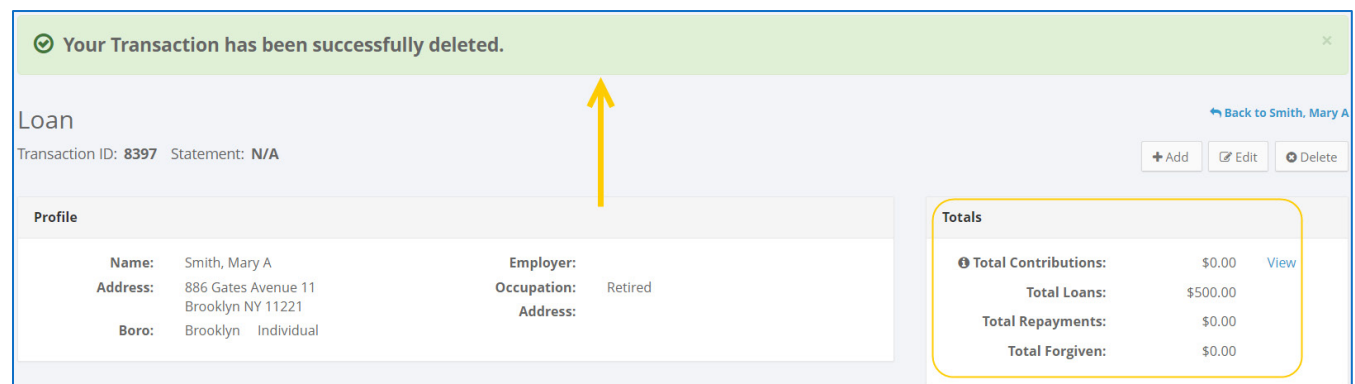
Profile	
Name:	Smith, Mary A
Address:	886 Gates Avenue 11 Brooklyn NY 11221
Boro:	Brooklyn Individual
Employer:	
Occupation:	Retired
Address:	

Totals	
Total Contributions:	\$250.00 View
Total Loans:	\$500.00
Total Repayments:	\$0.00
Total Forgiven:	\$250.00

➤ Click **Yes** on the window that opens to complete the deletion.



3. The forgiven amount has been successfully deleted.



✔ Your Transaction has been successfully deleted.

Loan
Transaction ID: 8397 Statement: N/A

Back to Smith, Mary A

+ Add Edit Delete

Profile	
Name:	Smith, Mary A
Address:	886 Gates Avenue 11 Brooklyn NY 11221
Boro:	Brooklyn Individual
Employer:	
Occupation:	Retired
Address:	

Totals	
Total Contributions:	\$0.00 View
Total Loans:	\$500.00
Total Repayments:	\$0.00
Total Forgiven:	\$0.00

Important: You should generally only delete a transaction if it was entered in error.