

C-SMART HELP

LOANS

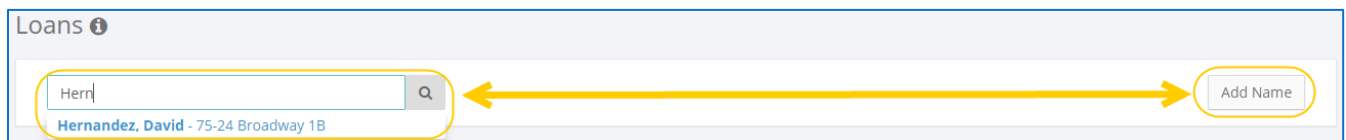
C-SMART enables you to report all loans received by your campaign as well as any related repayments and forgiven debts. Forgiven loans are considered contributions, subject to the relevant limits and restrictions.

HOW TO ADD A LOAN

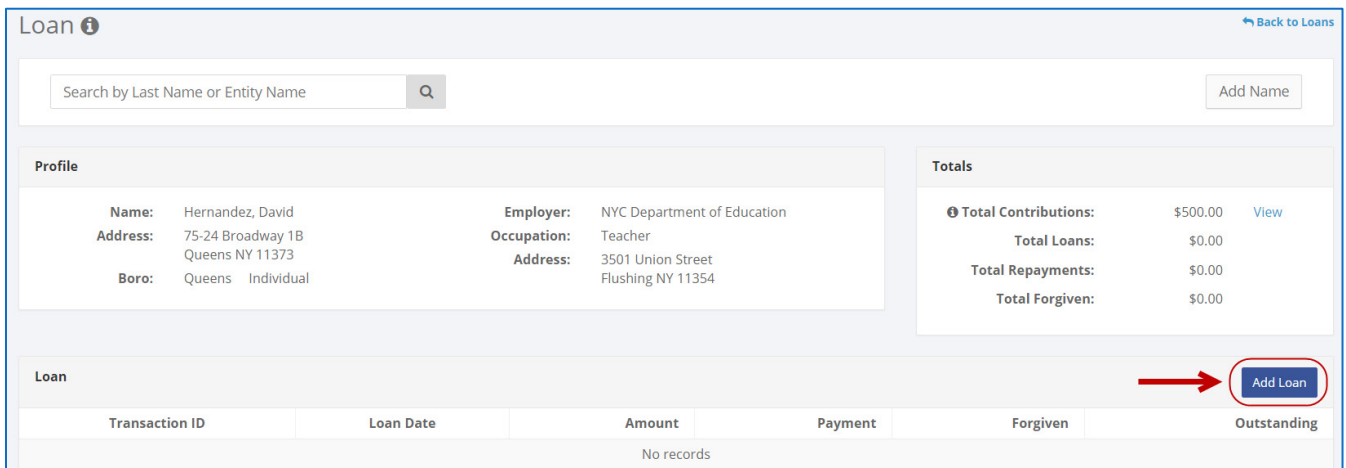
- Go to the **Loans** page.
 - Hover your cursor over Transactions and click **Loans**.



- Use the **Search by Last Name or Entity Name** bar to find the lender OR click **Add Name** to create a new record.



- Click **Add Loan**.



4. Enter and save the details of the loan.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Loan Date:** Enter the date the campaign received the loan.
 - ◆ **Amount:** Enter the dollar amount of the loan.
 - ◆ **Committee:** Select the committee receiving the loan. C-SMART will default to your principal committee, but you can select a different one if necessary.
 - ◆ **Bank Loan:** Check this box if the loan was from a bank or other financial institution.
 - ◆ **Runoff/Rerun:** Check this box if the loan was for an expected runoff or court-ordered rerun election. Accepting loans for a runoff is allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
 - ◆ **Segregated:** Indicate if the loan was collected through a segregated bank account. See Chapter 6 of the [Handbook](#) for guidance on segregated bank accounts
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transaction.
- Then, click **Save**.

Enter Details

*Loan Date: 10/30/2018

*Amount: \$50.00

*Committee: Sophia for Council

Bank Loan:

Runoff / Rerun:

Segregated:

Notes:
[For Campaign Use Only]

Save Cancel

Best Practice: Use the tab key to navigate between fields. Upon clicking **Save**, if a warning message pops up, read it. It may refer to a potential compliance issue that you need to address immediately.

5. The loan has been successfully saved.

The screenshot displays the C-SMART Loans interface. At the top, a green notification bar states "Your transaction has been successfully saved." with a close button. Below this is the "Loan" header with a search bar and an "Add Name" button. A yellow arrow points from the search bar area up to the notification bar. The main content is divided into three sections: "Profile", "Totals", and "Loan".

Profile

Name:	Hernandez, David	Employer:	NYC Department of Education
Address:	75-24 Broadway 1B Queens NY 11373	Occupation:	Teacher
Boro:	Queens Individual	Address:	3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$50.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

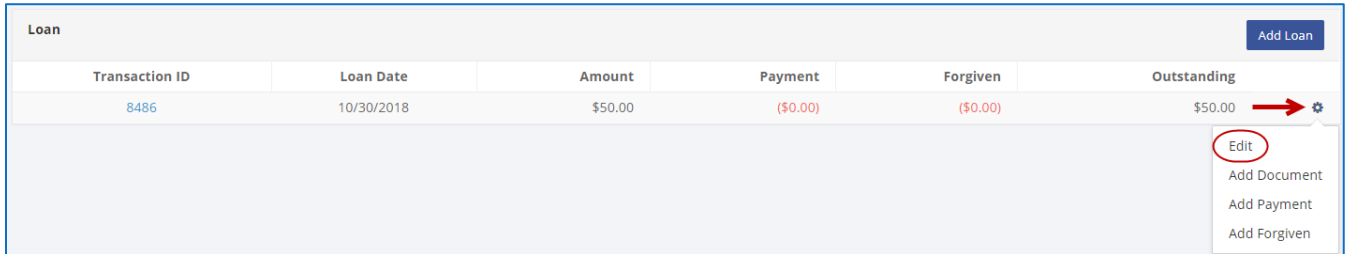
Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding	
8486	10/30/2018	\$50.00	(\$0.00)	(\$0.00)	\$50.00	⚙

- At this point, C-SMART will return you to the lender's **Loans** page. The **Totals** box and list of loans will be updated to reflect the newly saved transaction.

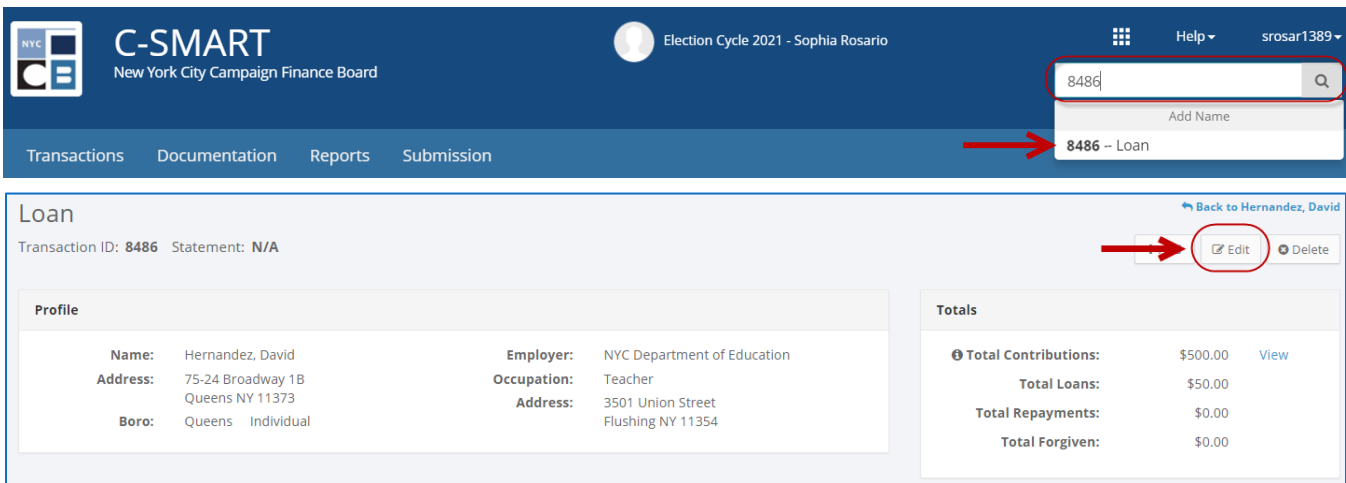
Best Practice: Notice that the transaction now has a Transaction ID. Write this number on the backup documentation (copies of checks, [loan agreement](#), etc.).

HOW TO EDIT A LOAN

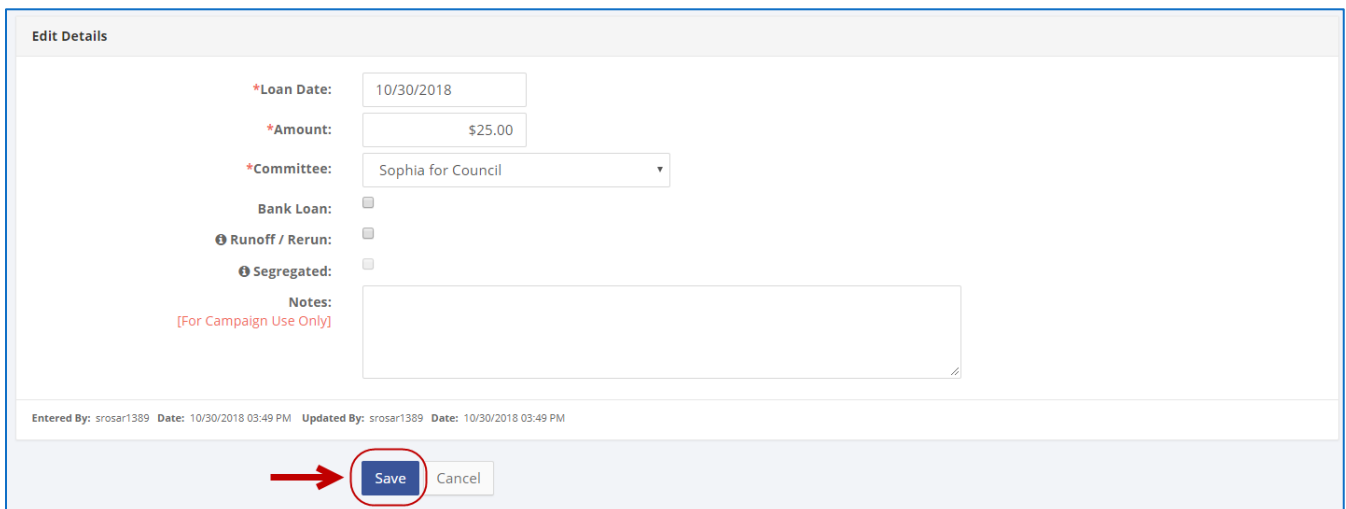
1. Go to the lender's **Loans** page.
 - From the lender's **Loans** page, click the **gear** and then **Edit** OR enter the loan's **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.



OR



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



3. The loan has been successfully edited.

Your transaction has been successfully saved.

Loan ⓘ ↶ Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

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

HOW TO DELETE A LOAN

1. Go to the lender's **Loans** page.

➤ Click the loan's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Loan ⓘ ↶ Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

OR

NYC **C-SMART**
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help

8486

Add Name

8486 - Loan

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.

Loan
Transaction ID: 8486 Statement: N/A

Back to Hernandez, David

+ Add **Delete**

Profile	
Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals	
Total Contributions:	\$500.00 View
Total Loans:	\$25.00
Total Repayments:	\$0.00
Total Forgiven:	\$0.00

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

Are you sure you want to delete this transaction?

Cancel Yes

3. The loan has been successfully deleted.

✔ Your Transaction has been successfully deleted.

Loan ⓘ Back to Loans

Search by Last Name or Entity Name

Profile	
Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

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

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
No records					

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