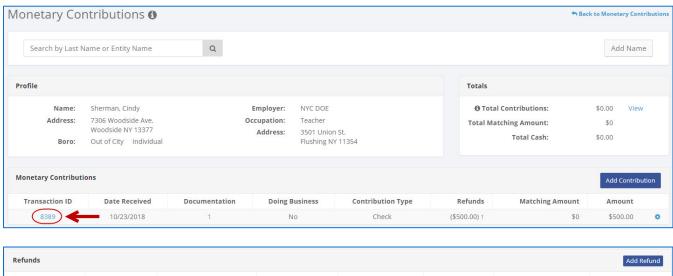
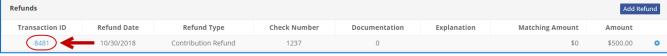
C-SMART HELP

MONETARY CONTRIBUTION REFUND DOCUMENTATION

HOW TO ADD MONETARY CONTRIBUTION REFUND DOCUMENTATION

- 1. Go to the **Monetary Contributions** page.
 - Click the contribution's Transaction ID, scroll down to Refunds, and click the refund's Transaction ID. You can also use the Search Name or Transaction ID bar.





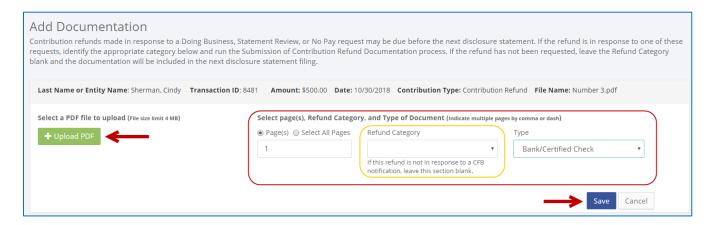
OR



2. Click Add Document.

| Documentation | | | | Add Document |
|---------------|------|-------------|-------------|------------------|
| | Туре | Date Linked | Submit Date | Statement Number |
| No records | | | | |

- 3. Click **Upload PDF** and choose a file from your computer.
 - Complete the following fields:
 - Page(s): Use a dash to select a page range (3-4) or a comma to select nonconsecutive pages (1, 3). You also can choose Select All Pages.
 - Refund Category: Provide the reason for the refund. If you are making the refund for a reason other than a CFB notice, you can leave this field blank.
 - Type: Indicate the type of document (agreement, check, EFT, etc.) You can upload multiple documents under a single type if they are contained in one PDF.
 - Then, click Save to store the document in C-SMART and link it to the transaction.



- 4. The document has been successfully linked to the transaction.
 - At this point, C-SMART will return you to the Monetary Contribution Refund page. The document is now linked to the transaction.



5. You can return to this page anytime and click View PDF to review your upload.

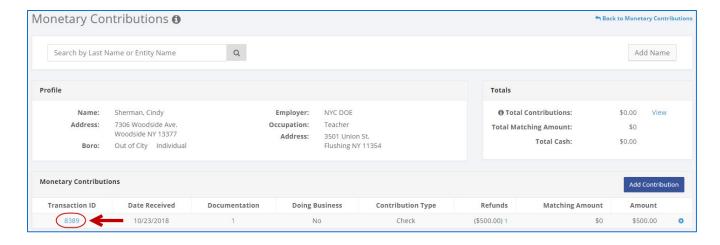


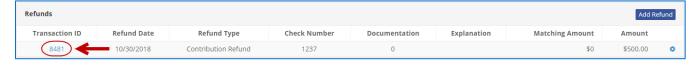
Important:

- The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.
- Refund documentation is submitted to the CFB when you complete a refund documentation submission to respond to a CFB request or through a regular disclosure statement submission. For assistance, please see our guide on <u>C-SMART</u> Help: Contribution Refund Documentation.

HOW TO DELETE MONETARY CONTRIBUTION REFUND DOCUMENTATION

- 1. Go to the **Monetary Contributions** page.
 - Click the contribution's Transaction ID, scroll down to Refunds, and click the refund's Transaction ID. You can also use the Search Name or Transaction ID bar.

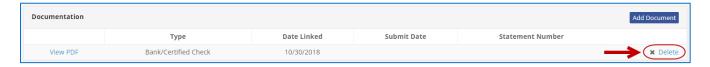




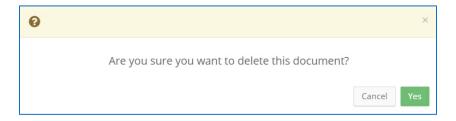
OR



2. Click **Delete** under **Documentation** to proceed.



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



3. The document has been successfully deleted.



Important: You cannot delete documentation once it has been submitted to the CFB.