

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.

Monetary Contributions Back to Monetary Contributions

Search by Last Name or Entity Name

Profile

Name: Sherman, Cindy	Employer: NYC DOE
Address: 7306 Woodside Ave. Woodside NY 13377	Occupation: Teacher
Boro: Out of City Individual	Address: 3501 Union St. Flushing NY 11354

Totals

Total Contributions:	\$0.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	

Monetary Contributions

Transaction ID	Date Received	Documentation	Doing Business	Contribution Type	Refunds	Matching Amount	Amount
8389	10/23/2018	1	No	Check	(\$500.00) 1	\$0	\$500.00

Refunds

Transaction ID	Refund Date	Refund Type	Check Number	Documentation	Explanation	Matching Amount	Amount
8481	10/30/2018	Contribution Refund	1237	0		\$0	\$500.00

OR

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8481

Add Name

8481 - ...Monetary Contribution Refund

Transactions Documentation Reports Submission

2. Click **Add Document**.

Documentation

Type	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 non-consecutive 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.

Add Documentation

Contribution refunds made in response to a Doing Business, Statement Review, or No Pay request may be due before the next disclosure statement. If the refund is in response to one of these requests, identify the appropriate category below and run the Submission of Contribution Refund Documentation process. If the refund has not been requested, leave the Refund Category blank and the documentation will be included in the next disclosure statement filing.

Last Name or Entity Name: Sherman, Cindy **Transaction ID:** 8481 **Amount:** \$500.00 **Date:** 10/30/2018 **Contribution Type:** Contribution Refund **File Name:** Number 3.pdf

Select a PDF file to upload (File size limit 4 MB)

+ Upload PDF

Select page(s), Refund Category, and Type of Document (Indicate multiple pages by comma or dash)

Page(s) Select All Pages

1

Refund Category

If this refund is not in response to a CFB notification, leave this section blank.

Type

Bank/Certified Check

Save Cancel

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.

✔ You have successfully linked page(s) 1 to Transaction ID: 8481

Monetary Contribution Refund

Transaction ID: 8481 Statement: N/A

➤ Back to Monetary Contribution Detail

Profile

Name: Sherman, Cindy	Employer: NYC DOE
Address: 7306 Woodside Ave. Woodside NY 13377	Occupation: Teacher
Boro: Out of City Individual	Address: 3501 Union St. Flushing NY 11354

Totals

Total Contributions:	\$0.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	

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

Documentation Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Bank/Certified Check	10/30/2018		Delete

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 [C-SMART 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.

Monetary Contributions Back to Monetary Contributions

Search by Last Name or Entity Name

Profile

Name: Sherman, Cindy	Employer: NYC DOE
Address: 7306 Woodside Ave. Woodside NY 13377	Occupation: Teacher
Boro: Out of City Individual	Address: 3501 Union St. Flushing NY 11354

Totals

Total Contributions:	\$0.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	

Monetary Contributions

Transaction ID	Date Received	Documentation	Doing Business	Contribution Type	Refunds	Matching Amount	Amount
8389	10/23/2018	1	No	Check	(\$500.00) 1	\$0	\$500.00

Refunds

Transaction ID	Refund Date	Refund Type	Check Number	Documentation	Explanation	Matching Amount	Amount
8481	10/30/2018	Contribution Refund	1237	0		\$0	\$500.00

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8481

Add Name

8481 - ...Monetary Contribution Refund

Transactions Documentation Reports Submission

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

Documentation					Add Document
	Type	Date Linked	Submit Date	Statement Number	
View PDF	Bank/Certified Check	10/30/2018			 Delete

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

?

Are you sure you want to delete this document?

Cancel Yes

3. The document has been successfully deleted.

✔ The document has been successfully deleted.

Monetary Contribution Refund

Transaction ID: 8481 Statement: N/A

[Back to Monetary Contribution Detail](#)

+ Add Edit Delete Print Letter

Profile		Totals	
Name: Sherman, Cindy	Employer: NYC DOE	Total Contributions: \$0.00	View
Address: 7306 Woodside Ave. Woodside NY 13377	Occupation: Teacher	Total Matching Amount: \$0	
Boro: Out of City Individual	Address: 3501 Union St. Flushing NY 11354	Total Cash: \$0.00	

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