

# C-SMART HELP

## MONETARY CONTRIBUTION REFUNDS

### HOW TO ADD A MONETARY CONTRIBUTION REFUND

1. Go to the contributor's **Monetary Contributions** page.
  - Click the contribution's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Monetary Contributions ⓘ ↶ Back to Monetary Contributions

Search by Last Name or Entity Name

Profile				Totals			
Name:	Smith, Mary A	Employer:		Total Contributions:	\$500.00	<a href="#">View</a>	
Address:	886 Gates Avenue 11 Brooklyn NY 11221	Occupation:	Retired	Total Matching Amount:	\$175		
Boro:	Brooklyn Individual	Address:		Total Cash:	\$0.00		

Monetary Contributions

Transaction ID	Date Received	Documentation	Doing Business	Contribution Type	Refunds	Matching Amount	Amount
8390	2/1/2019	0	No	Check	(\$0.00) 0	\$175	\$500.00

OR

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Help srosar1389

8390

Add Name

8390 -- Monetary Contribution

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2. Click **Add Refund**.

Documentation

Type	Date Linked	Submit Date	Statement Number
No records			

### 3. Enter and save the details of the refund.

➤ C-SMART will alert you if you leave out required information. Complete the following fields:

- ◆ **Refund Date:** Enter the date the contribution was refunded.
- ◆ **Amount:** Enter the amount refunded.
- ◆ **Matching Amount:** Enter the matching amount to be refunded (the full amount that was claimed.)
- ◆ **Refund Type:** Indicate the type of refund:
- ◆ **Check Number:** Enter the refund check number.
- ◆ **Explanation:** If you entered **Other** under type, you must provide an explanation.
- ◆ **Bank Account:** Select the bank account from which the refund was drawn. C-SMART will default to your primary account, but you can choose a different one if necessary.
- ◆ **Notes:** Enter any additional information. The CFB does not receive you enter in this field. Your notes will be saved across all related transactions.

➤ Then, click **Save**.

Enter Details Contribution Date Received: 2/1/2019 Contribution Amount: \$500.00 Matching Amount: \$175

\*Refund Date:

\*Amount: \$

Matching Amount: \$

\*Refund Type:

Explanation:

⊕ Check Number:

Bank Account:

Notes:  
[For Campaign Use Only]



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**Best Practice:**

- ◆ Use the tab key to navigate between fields.

**Important:**

- ◆ If a warning message appears, read it. It might refer to a potentially urgent compliance issue.
- ◆ You must claim all contributions for match within the applicable reporting period for them to be valid. C-SMART will not allow you to claim more than the maximum for any one contributor in a single election cycle.
- ◆ If the check was voided, click **Void Check** and enter the void date. This will also void the repayment. If you issue a new check, you must create a new **Monetary Contribution Refund**.

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4. The transaction has been successfully saved.

- At this point, C-SMART will return you to the **Monetary Contribution Refund** page. The **Totals** box and list of refunds will be updated to reflect the newly saved transaction.

The screenshot displays the 'Monetary Contribution Refund' page. At the top, a green banner with a checkmark icon reads 'Your transaction has been successfully saved.' A yellow arrow points from this message down to the 'Totals' box. The page title is 'Monetary Contribution Refund' with 'Transaction ID: 8391' and 'Statement: N/A' below it. On the right, there are buttons for '+ Add', 'Edit', 'Delete', and 'Print Letter', along with a link 'Back to Monetary Contribution Detail'. The 'Profile' section on the left lists: Name: Smith, Mary A; Address: 886 Gates Avenue 11, Brooklyn NY 11221; Boro: Brooklyn Individual; Employer: Retired; Occupation: Retired; Address: (blank). The 'Totals' box on the right contains: Total Contributions: \$0.00 (with a 'View' link); Total Matching Amount: \$0; Total Cash: \$0.00.

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**Best Practice:** Write the C-SMART **Transaction ID** on the copy of the bank or certified refund check.

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## HOW TO EDIT A MONETARY CONTRIBUTION REFUND

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

Monetary Contributions Back to Monetary Contributions

Search by Last Name or Entity Name

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**Profile**

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

**Totals**

Total Contributions: \$0.00 [View](#)  
Total Matching Amount: \$0  
Total Cash: \$0.00

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**Monetary Contributions**

Transaction ID	Date Received	Documentation	Doing Business	Contribution Type	Refunds	Matching Amount	Amount
8390	2/1/2019	0	No	Check	(\$500.00) 1	\$0	\$500.00

Monetary Contribution Refund Back to Monetary Contribution Detail

Transaction ID: 8391    Statement: N/A

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**Profile**

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

**Totals**

Total Contributions: \$0.00 [View](#)  
Total Matching Amount: \$0  
Total Cash: \$0.00

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**Refunds**

Transaction ID	Refund Date	Refund Type	Check Number	Documentation	Explanation	Matching Amount	Amount
8391	2/1/2019	Contribution Refund	1235	0		\$0	\$500.00

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

Edit Refund Details
Contribution Date Received: 2/1/2019 Contribution Amount: \$500.00  
Matching Amount: \$0

\*Refund Date:

\*Amount: \$

Matching Amount: \$

\*Refund Type:

Explanation:

Check Number:

Bank Account:

Void Check:  Void Date:

Notes:

Entered By: srosar1389 Date: 02/01/2019 04:07 PM Updated By: srosar1389 Date: 02/01/2019 04:07 PM

➔

3. The refund has been successfully edited.

✔ Your transaction has been successfully saved.

### Monetary Contribution Refund

Transaction ID: 8391 Statement: N/A

[Back to Monetary Contribution Detail](#)

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 <a href="#">View</a>
Total Matching Amount:	\$0
Total Cash:	\$0.00

**Important:**

- ◆ The timestamp at the bottom will be updated to show who last modified the transaction.
- ◆ If the check was voided, click **Void Check** and enter the void date. This will also void the repayment. If you issue a new check, you must create a new **Monetary Contribution Refund**.

## HOW TO DELETE A MONETARY CONTRIBUTION REFUND

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

Monetary Contributions Back to Monetary Contributions

Search by Last Name or Entity Name

**Profile**

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

**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
8390	2/1/2019	0	No	Check	(\$500.00) 1	\$0	\$500.00

**Refunds**

Transaction ID	Refund Date	Refund Type	Check Number	Documentation	Explanation	Matching Amount	Amount
8391	2/1/2019	Contribution Refund	1235	0		\$0	\$500.00

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8391

Add Name

8391 -- ...Monetary Contribution Refund

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- Click **Delete** to proceed.

Monetary Contribution Refund Back to Monetary Contribution Detail

Transaction ID: 8391 Statement: N/A

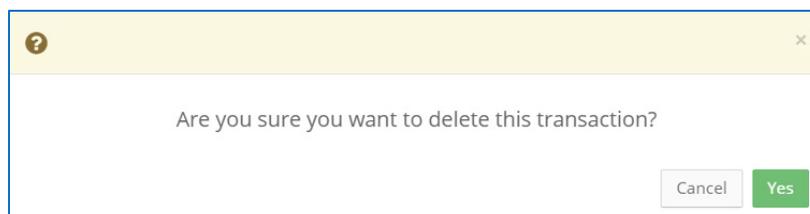
**Profile**

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

**Totals**

Total Contributions: \$0.00 [View](#)  
 Total Matching Amount: \$0  
 Total Cash: \$0.00

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



3. The refund has been successfully deleted.

✔ Your Transaction has been successfully deleted. ✕

### Monetary Contribution

Transaction ID: 8390 Statement: N/A [Back to Smith, Mary A](#)

[+ Add](#) [Edit](#) [Delete](#) [Print Letter](#) [Send Email](#)

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

Totals	
<b>Total Contributions:</b> \$500.00	<a href="#">View</a>
<b>Total Matching Amount:</b> \$0	
<b>Total Cash:</b> \$0.00	

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

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