

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	View	
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

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8390

Add Name

8390 -- Monetary Contribution

Transactions Documentation Reports Submission

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]



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**.
-

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 shows: Name: Smith, Mary A; Address: 886 Gates Avenue 11, Brooklyn NY 11221; Boro: Brooklyn Individual; Employer: Retired. The 'Totals' box, highlighted with a yellow border, contains: Total Contributions: \$0.00 (with a 'View' link); Total Matching Amount: \$0; Total Cash: \$0.00.

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

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

Profile

Name: Smith, Mary A Employer: **Totals**
Address: 886 Gates Avenue 11 Occupation: Retired Total Contributions: \$0.00 [View](#)
Brooklyn NY 11221 Address: Total Matching Amount: \$0
Boro: Brooklyn Individual 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 <input type="button" value="⚙"/>

Monetary Contribution Refund Back to Monetary Contribution Detail

Transaction ID: 8391 Statement: N/A

Profile

Name: Smith, Mary A Employer: **Totals**
Address: 886 Gates Avenue 11 Occupation: Retired Total Contributions: \$0.00 [View](#)
Brooklyn NY 11221 Address: Total Matching Amount: \$0
Boro: Brooklyn Individual Total Cash: \$0.00

OR

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New York City Campaign Finance Board

Transactions Documentation Reports Submission

8391 |

8391 -- ...Monetary Contribution Refund

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 <input type="button" value="⚙"/>

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: 02/01/2019

*Amount: \$ 250.00

Matching Amount: \$ 0

*Refund Type: Contribution Refund

Explanation:

Check Number: 1235

Bank Account: Smart Savings Bank(****3522)

Void Check: Void Date:

Notes: [For Campaign Use Only]

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

Save Cancel

3. The refund has been successfully edited.

Monetary Contribution Refund [Back to Monetary Contribution Detail](#)

Transaction ID: 8391 Statement: N/A + Add Edit Delete Print Letter

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 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

OR

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Transactions Documentation Reports Submission

8391 |

Add Name

8391 -- ...Monetary Contribution Refund

- Click **Delete** to proceed.

Monetary Contribution Refund Back to Monetary Contribution Detail

Transaction ID: 8391 Statement: N/A

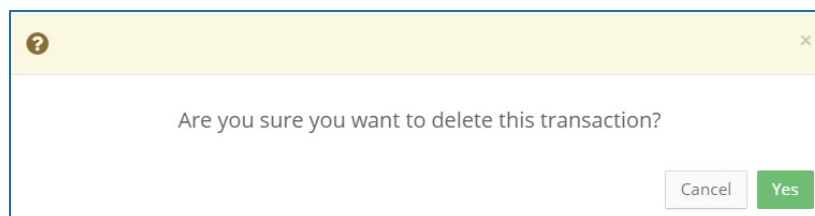
Profile

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

Totals	
Total Contributions: \$500.00	View
Total Matching Amount: \$0	
Total Cash: \$0.00	

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