C-SMART HELP

CFB SUBMISSIONS — UN-ITEMIZED AMOUNTS, TERMINATION REPORT, & INITIAL SUMMARY INFORMATION

➢ These three categories appear on the CFB disclosure statement and amendment screens and only rarely apply to campaigns. If you are unsure whether they apply to your campaign, consult your candidate services liaison. If they do apply, be sure to enter the required information and carefully review any information automatically populated by C-SMART.

♦ **Un-itemized Amounts:** These represent the value of small transactions that you have not entered into C-SMART.

♦ **Termination Report**: If your committee is terminating activities (after fulfilling any public funds repayment obligations and paying off all liabilities) before the last disclosure statement of the election cycle is due, you should indicate this using the Termination Report section on the CFB Submission screen.

♦ **Initial Summary Information**: This section gives you the opportunity to set summary numbers in C-SMART for a particular disclosure statement. These numbers are included in your submissions or amendments and are required by the CFB if applicable. C-SMART does not calculate un-itemized amounts for you.

UNITEMIZED AMOUNTS

➢ **For Schedules ABC and D:**

◆ These include the value of small monetary and in-kind contributions that you have decided not to enter into C-SMART. These contributions are not matchable. If you receive any individual contributions of more than $100, you are required to itemize them. If you receive multiple contributions from the same contributor that exceed $100 in sum, you must itemize the contribution that brings the total over $100 and all subsequent contributions.

➢ **For Schedule E:**

◆ These include the value of small receipts other than contributions that you have not entered into C-SMART. If you receive more than $100 from any single source, you are required to itemize it. If you receive multiple contributions from a single source that exceed $100 in the aggregate, you must itemize the contribution that brings the total over $100 and all subsequent receipts.

➢ **For Schedule F:**

◆ These include the value of small expenditures that you have not entered into C-SMART. If you pay more than $50 to any vendor, you are required to itemize the expenditure. If you make multiple payments to any vendor that exceed $50 in the aggregate, you must itemize the payment that brings the total over $50 and all subsequent payments.

Important: You are required to keep all records related to un-itemized transactions.

Best Practice: It is strongly recommended to enter itemized transactions in C-SMART regardless of the amount. Un-itemized transactions bypass C-SMART's tracking of contribution totals and therefore hinder C-SMART's ability to facilitate your compliance.

TERMINATION REPORT

➢ You must indicate whether this is a Termination Report by checking the Termination Report box.

◆ **Date last liability paid: You must enter the date of the last liability paid, if applicable.**

INITIAL SUMMARY INFORMATION

It is strongly recommended that you use C-SMART to generate the Summary pages that you are required to submit to the CFB, NYC BOE, and NYS BOE by filling out the fields on the screen.

➢ If this is the first disclosure statement you are filing for a new committee, these opening numbers will all be $0.

➢ If this is the first disclosure statement you are filing using this version of C-SMART but not the first disclosure statement of the election cycle or if your committee was used in a prior election, these numbers should be available on the Summary pages that were submitted in the last disclosure statement for that committee.

➢ If you filed a previous disclosure statement using this version of C-SMART, the software will estimate these values based on the results of the last filed submission or amendment.

➢ If you have already run a draft or final submission for this disclosure statement, the last numbers entered will remain in these fields.

Any changes made to your data or to C-SMART may cause the numbers on past Summary Information pages or in C-SMART to be incorrect. For example, if you amend your data on paper without including the changes in C-SMART, your summary numbers will be incorrect. Similarly, if you have not used C-SMART to generate prior disclosure statements, your summary numbers will be incorrect. You are responsible for checking the accuracy of these Summary Page numbers, even if they are provided by C-SMART.

The Recalculate Summary feature is used to refresh the figures kept in C-SMART. It recalculates starting with the opening numbers in each committee's first statement. Please make sure these figures are accurate before running a Recalculate Summary. This feature should be used if any of the summary numbers in any of the statements in C-SMART appear to be inaccurate, possibly as a result of a computer crash while you were running C-SMART or other interruption. For more information, see Recalculate Summary.

If you want to enter information on your Summary Information manually, enter it in the Initial Summary Information section of **Submit Disclosure or Submit Amendment**.