

Salt Lake County Clerk

Online Campaign Financial Disclosure Website

Candidate User's Guide

This document summarizes how to use the County Clerk's website for submitting campaign financial disclosure reports. The website is a secure (128-bit SSL encrypted) area where candidates (or staff) can log in and submit these reports electronically.

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Account Activation / Logging In

In order to login the first time, you will need to have the Clerk's Office create and activate your online account. Contact the Elections Division at (801) 468-3427 for activation instructions.

You are required to provide an email account to use the system. Once activated, you will receive an automated email from the Clerk's Office with your login username and a temporary password with further instructions. On your first login attempt, you will be required to change your password.

Using your web browser, go to:

<https://secure.slco.org/financialDisclosure/candidate>

Tip: Be sure you are entering the "s" after "http" in the above URL. If not, you will get a "page not found" error message.

Username: Your username was emailed to you when your account was originally activated.

Password: If this is your first login, enter the temporary password emailed to you. Otherwise, use the password you created when you first logged in during account activation.

[see Screen Shot 1]


Note: Microsoft Internet Explorer is the recommended browser for use with this website. Any other browsers may produce unexpected results.

Screen Shot 1 - Login

Candidate Account Management - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://secure.slco.org/financialDisclosure/candidate/>



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Login

| | |
|------------|---|
| User Name: | <input type="text"/> |
| Password: | <input type="password"/> <input type="button" value="Login"/> |

[Forgot your password?](#)

Main Reports Menu

This is the main menu area where you will see your demographic information and any reports that are currently available for you to work on.

Viewing a Report

To view a report, simply click the name of the report and the current version of that report will be displayed. In the example screen shot (see Screen Shot 2), you would click "Year End Report 2005" if you wanted to view that report.

Editing a Report

Editing a report consists of entering Schedule A and Schedule B transactions. As you work with a report, you can add, change, and delete transactions as often as wish and in any order. In the "Action" column of the report you wish to work with, click on the action you wish to take.

For example, looking at Screen Shot 2, to enter and edit Schedule A transactions for the Year-end Report 2005, click "Schedule A" in the Action column of that report. Likewise to work with Schedule B transactions, you would click "Schedule B."

You may work on a report during several sessions and login/logout as often as you like. All your changes are auto-saved as you work. For example, you might enter several transactions on Monday, then come back the following Wednesday and enter several more. Your report is in "rough draft" mode until you decide to file it online with the Clerk. The Clerk does not have access to your report's information until you file it online.

Filing a Report


When you have entered all transactions and are satisfied that your report is complete, you must file it online with the Clerk. To do this, click the "File" link in the Action column for the report you wish to file. You must take this action when you are completely done working with your report in order for the Clerk to receive your report. Do not click the "File" action until your report is 100% complete.

Once filed, you will see a screen similar to Screen Shot 8 which shows your report and confirmation number (with date-time the report was filed). You will also receive an automated email confirmation receipt that your report was filed and received by the Clerk.

Amending a Filed Report

It is possible to make a correction to a report that you have already filed, but you must first contact the Clerk's Office, Elections Division at (801) 468-3427 and request to make an amendment. At that point, the Clerk will activate an "amended version" of the report you wish to change. Once that amended version is activated, you will see it listed on the Main Reports Menu. You can then work with (edit your Schedule A and B transactions) and re-file. You must choose the "File" action when you are done making all your changes in order for the amended report to be sent to the Clerk.

Screen Shot 2 – Main Reports Menu



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[Logout](#)

Name: **Alfred E Newman**
Party Affiliation: **UNDECIDED**
Office Sought: **Council #5**
Address: **123 Oak Park Lane
Salt Lake City UT 84155**
Phone Number: **801-555-1212**
Fax Number: **801-555-2323**
Email: **myemail@slco.org**

Your Reports:

| Report Name | Due Date | Filed Date | Action |
|--------------------------------------|--------------------|------------|--|
| Year-End Report 2005 | 06/08/2006 5:00 PM | | Schedule A Schedule B File |

Logged in: **Alfred E Newman** | 10.20.27.93 | 05/18/2006 3:34p

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Schedule A Transactions

Click the “Schedule A” link in the Action column of the report you wish to work with. You will see a screen that looks something like Screen Shot 3. Once all information for the record is entered and submitted, you will see the new record appear at the bottom of the screen. You can continue entering new records, or you may edit the records you have already entered (by clicking the Edit link next to the record you wish to change).

Contributor

This is the name of the person or business that made the contribution. Enter the name of the contributor. If they already exist in the system, you will be prompted to select the matching account. If they are new to the system, you will see a new screen (see Screen Shot 4) that requires you to enter information about that contributor (name, address, etc). Once entered into the system, you can then use that contributor on your report.

Date Received

This is the date the contribution was received. The date entered must fall within the reporting date range of the report you are working on. The correct format is MM/DD/YYYY.


Amount

Enter in decimal format. Do not include a dollar sign or comma's.

In-Kind

If this is an “in-kind” contribution, check this box.

Screen Shot 3 – Schedule A, Part 1




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Schedule A - Contribution Data Entry

| | | |
|--|---|---|
| Contributor: Add New | <input type="text"/> |  |
| Date Received: Format: MM/DD/YYYY | <input type="text" value="05/18/2006"/> | Required Date Range Mar. 1, 2006 - Jun. 8, 2006 |
| Amount: Format: Decimal (no commas) | <input type="text" value="\$ 0.00"/> | |
| In Kind? | <input type="checkbox"/> | |


[Cancel](#)

*** No Schedule A records for this report have been entered yet. ***

Logged in: **Alfred E Newman** | 10.20.27.93 | 05/18/2006 4:09p

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Screen Shot 4 – Create New Contributor Record



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Add New Contributor


[Cancel](#) | [Main Menu](#)

| | |
|---|--|
| Name of Contributor: | <input type="text"/> |
| Date Received: Format: MM/DD/YYYY | <input type="text" value="05/19/2006"/> Required Date Range Mar. 1, 2006 - Jun. 8, 2006 |
| Amount: Format: Decimal (no commas) | \$ <input type="text" value="0.00"/> |
| Type: | <input checked="" type="radio"/> Individual <input type="radio"/> Business |
| Address: | <input type="text"/> |
| City: | <input type="text"/> |
| State: | <input type="text"/> |
| Zipcode: | <input type="text"/> |
| Occupation: | <input type="text"/> |
| Employer: | <input type="text"/> |

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Screen Shot 5 – The Schedule A screen after several new records have been added.



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New record added to Schedule A.

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Schedule A - Contribution Data Entry

| | | |
|--|---|---|
| Contributor: Add New | <input type="text"/> |  |
| Date Received: <small>Format: MM/DD/YYYY</small> | <input type="text" value="05/19/2006"/> | Required Date Range Mar. 1, 2006 - Jun. 8, 2006 |
| Amount: <small>Format: Decimal (no commas)</small> | <input type="text" value="\$ 0.00"/> | |
| In Kind? | <input type="checkbox"/> | |

[Cancel](#)

Schedule A - Preview

Itemized Contributions Received

| Date Received | Contributor Name | Address | Occupation | Employer | Type | Amount | In-Kind? | |
|---------------|------------------|--|------------|---------------------|------------|----------|----------|---|
| 05/17/2006 | Larry Johnson | 35 West Street Murray, UT 87946 | MD | Cottonwood Hospital | Individual | \$500.00 | | Edit Remove |
| 05/19/2006 | Joes Auto | 1000 South 500 West Salt Lake City, UT 86542 | | Joes Auto Repair | Business | \$300.00 | | Edit Remove |
| 05/19/2006 | John Q Smith | 456 Maple Drive Salt Lake City, UT 84152 | Student | | Individual | \$100.00 | | Edit Remove |

Logged in: **Alfred E Newman** | 10.20.27.93 | 05/19/2006 9:02a

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Schedule B Transactions

Click the “Schedule B” link in the Action column of the report you wish to work with. You will see a screen that looks something like Screen Shot 6. Once all information for the record is entered and submitted, you will see the new record appear at the bottom of the screen. You can continue entering new records, or you may edit the records you have already entered (by clicking the Edit link next to the record you wish to change).

Date Expended

This is the date the expenditure was made. The date entered must fall within the reporting date range of the report you are working on. The correct format is MM/DD/YYYY.

Recipient Name

This is the name of the person or business that received the expenditure. Enter the name of the recipient. If they already exist in the system, you will be prompted to select the matching account.


Purpose

This is the description of the expenditure.

Amount

Enter in decimal format. Do not include a dollar sign or comma's.

Screen Shot 6 – Schedule B, part 1



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Schedule B - Expenditure Data Entry

Required Date Range
Mar. 1, 2006 - Jun. 8, 2006

| Date Expended (Format: MM/DD/YYYY) | Recipient Name | Purpose | Amount (Format: Decimal, no comma's) |
|---|---|----------------------|---|
| <input type="text" value="05/19/2006"/> | <input type="text"/>  | <input type="text"/> | \$ <input type="text" value="0.00"/> |


[Cancel](#)

*** No Schedule B records for this report have been entered yet. ***

Logged in: **Alfred E Newman** | 10.20.27.93 | 05/19/2006 9:07a

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Screen Shot 7 – The Schedule B screen after several new records have been added.



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New expenditure record added.

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Schedule B - Expenditure Data Entry

Required Date Range
Mar. 1, 2006 - Jun. 8, 2006

| Date Expended <small>(Format: MM/DD/YYYY)</small> | Recipient Name | Purpose | Amount <small>(Format: Decimal, no comma's)</small> |
|--|-----------------------------------|-------------------------------|--|
| <input type="text" value="05/19/2006"/> | <input type="text" value=""/> | <input type="text" value=""/> | \$ <input type="text" value="0.00"/> |

[Cancel](#)

Schedule B - Preview
Itemized Expenditures Made

| Date Expended | Recipient Name | Purpose | Amount | |
|---------------|--------------------|----------------|---------|---|
| 05/19/2006 | City Taxi | Ride to Parade | \$15.45 | Edit Remove |
| 05/19/2006 | Outback Steakhouse | Dinner | \$49.95 | Edit Remove |
| 05/19/2006 | Tom's Marketing | Bumber Sticker | \$25.00 | Edit Remove |

Logged in: **Alfred E Newman** | 10.20.27.93 | 05/19/2006 10:07a

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Screen Shot 8 – Filing Confirmation Screen



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Financial Disclosure Report - Filing Receipt

Success! Your report has now been filed with the Clerk. This receipt contains a confirmation number and the date/time the filing was completed. Please **save or print** this receipt for your records.

Date Filed: **05/19/2006 10:11 AM**
Confirmation Number: **126905**

| | | | |
|--|-------------------------------------|-------------------------------------|--|
| Name of Candidate or Officeholder Newman, Alfred E | | Political Party UNDECIDED | |
| Address 123 Oak Park Lane | City Salt Lake City | State UT | Zip Code 84155 |
| Office Sought Council #5 | Phone Number 801-555-1212 | Fax # 801-555-2323 | Email Address myemail@slco.org |

Org Type: **Local School Boards**
Report: **Year-End Report 2005**

Summary

| | Column A Total this period | Column B Year-to-Date |
|--|-------------------------------|---------------------------------------|
| Contributions Received | | |
| 1 Total Contributions Received (See Schedule A) | \$900.00 | \$900.00 |
| Expenditures Made | | |
| 2 Total Expenditures Made (See Schedule B) | \$90.40 | \$90.40 |
| Balance Summary | | |
| 3 Balance at Beginning of Reporting Period | \$0.00 | ◀ Refer to Line 7 on your last report |
| 4 Total Contributions Received (From Line 1 Column A) | \$900.00 | |
| 5 Subtotal (Add Lines 3 and 4) | \$900.00 | |
| 6 Total Expenditures Made (From Line 2 Column A) | \$90.40 | |
| 7 Balance at Close of Reporting Period | \$809.60 | |

Schedule A

Itemized Contributions Received

| Date Received | Contributor Name | Address | Occupation | Employer | Type | Amount | In-Kind? |
|----------------------------|------------------|--|------------|---------------------|------------|-----------------|----------|
| 05/17/2006 | Larry Johnson | 35 West Street Murray, UT 87946 | MD | Cottonwood Hospital | Individual | \$500.00 | |
| 05/19/2006 | Joes Auto | 1000 South 500 West Salt Lake City, UT 86542 | | | Business | \$300.00 | |
| 05/19/2006 | John Q Smith | 456 Maple Drive Salt Lake City, UT 84152 | | | Individual | \$100.00 | |
| Total Contributions | | | | | | \$900.00 | |

Schedule B

Itemized Expenditures Made

| Date Expended | Recipient Name | Purpose | Amount |
|---------------------------|--------------------|----------------|----------------|
| 05/19/2006 | City Taxi | Ride to Parade | \$15.45 |
| 05/19/2006 | Outback Steakhouse | Dinner | \$49.95 |
| 05/19/2006 | Tom's Marketing | Bumber Sticker | \$25.00 |
| Total Expenditures | | | \$90.40 |