

# Electronic Filing

## System (EFS) Software V. 5.1

### For Campaign Financial Disclosure Reporting

#### Download the EFS Software V. 5.1

Go to the New York State Board of Elections website: **[www.elections.ny.gov](http://www.elections.ny.gov)**

- CLICK [Campaign Finance] tab on left side of screen
- CLICK [File Disclosure Reports] tab on left side of screen
- CLICK [Download EFS] if using a PC or [EFSDesktopSoftwareForMac.zip] if using a Mac
- CLICK the icon created on your desktop after the download

#### Add a New/Additional Filer Setup

- CLICK [New/Additional Filer Setup]
- Read the Electronic Filing System End User License Agreement and scroll to the bottom to CLICK [I understand and accept all the terms as set forth above]
- Enter the Candidate or Committee Name
- Enter your Filer ID assigned by the NYSBOE
- Enter the PIN assigned by the NYSBOE
- Enter your Filer ID and PIN again to confirm
- Enter your initials
- Enter your starting balance
- CLICK [Save]
- CLICK on the Filer ID drop-down arrow and click on the Filer ID you would like to work with
- CLICK [Add a New Reporting Cycle]
- CLICK [Select a Reporting Cycle you would like to work with]

#### Create a Report

To Create a Reporting Cycle

- CLICK [Add a New Reporting Cycle]
- [Select A Reporting Cycle] from the drop-down and CLICK [Continue]
- Choosing a January or July Periodic and election year and CLICK [Save] will automatically take you to [Choose a Schedule]
- OR-
- Enter or select the date of the Election for Primary, General, Special, or Off-Cycle and CLICK [Save]

*Note: The software will automatically create your Primary, General & Special Election Day reporting periods with dates corresponding to the election day date selected and will return you to the main screen.*

- CLICK [Select a Reporting Period] from the drop-down
- CLICK [Choose a Schedule] and select a schedule from the drop-down menu
- CLICK [New Transaction]

- A Schedule Tab will be created on your Navigation Bar every time you choose a Schedule and CLICK [New Transaction]

## Enter Transactions

- Enter the transaction information required for the selected schedule and CLICK [Save]
- Add any additional transactions and CLICK [Close] when finished with that schedule
- CLICK [Transactions] on the navigation bar to create a new schedule, repeating [Choose a Schedule] and [New Transaction]

### Schedules for Disclosure Reporting

#### **Contributions / Receipts**

Schedules A, B, C, D, E

#### **Expenditures**

Schedule F

#### **Transfers**

Schedules G and H

#### **Loans, Liabilities & Refunds**

Schedules I, J, K, L, M

#### **Record-Keeping**

Schedules N and O

#### **Housekeeping**

Schedules P and Q

*For party and constituted committees only*

#### **Allocations**

Schedule R

*For party, constituted, independent expenditure and authorized multi-candidate committees only*

## Submit a Report to NYSBOE

Submitting a report requires TWO steps. **First**, you will need to export (save to file) the report.

**Second**, you will need to attach the report to an email and send it to [efsfiling@elections.ny.gov](mailto:efsfiling@elections.ny.gov).

- Select the Reporting Cycle from the drop-down for [Select a Reporting Cycle].  
For Primary, General and Special Election reports, also select the Reporting Period from the drop-down for [Select a Reporting Period] you want to submit
- CLICK [File] in the Menu Bar and choose [Export (Save to File) a Report to send to NYSBOE]

### Step 1 – Export a Report

- If this is an amendment to a previously-filed report, check the box [This is an Amendment]
- CLICK [Continue] if this is the first time you are filing this report
- The software will give your file a name that consists of your Filer ID, the last two digits of the year, and the letter ending to match the report period code (i.e. A00000.18K)
- Select the directory to which you want to save your file and CLICK [Open]

### Report Period Codes

A – 32 Day Pre-Primary

B – 11 Day Pre-Primary  
C – 10 Day Post-Primary  
D – 32 Day Pre-General  
E – 11 Day Pre-General  
F – 27 Day Post-General  
G – 32 Day Pre-Special  
H – 11 Day Pre-Special  
I – 27 Day Post-Special  
J – January Periodic  
K – July Periodic  
L – Off Cycle

Amended Report Coding: The software will give your file a name that consists of your Filer ID, the last two digits of the year, the letter matching the report period code and the **.A** to indicate that the filing is an amendment. (i.e. A00000.18K.A).

## **Step 2 – Send Exported Report by Email**

- The report has been exported to the location chosen in the step above on your computer
- Open your email account to compose new email
- Type **efsfiling@elections.ny.gov** in the “To” field
- Type **EFS Disclosure Report** in the “Subject” field
- Attach the exported disclosure report to the email and CLICK [Send]

## **Verify NYSBOE’s Receipt of Your Disclosure Report**

To verify that your campaign financial disclosure report has been received by the NYSBOE:

- Visit the NYSBOE website at **www.elections.ny.gov**
- CLICK [Campaign Finance] tab on left side of screen
- CLICK [View Disclosure Reports] tab on left side of screen
- Under the Query the Database heading, CLICK [View Candidate or Committee by Name]
- Enter all or part of the candidate or committee name
- CLICK [Submit Query]
- CLICK on your Filer ID Detail Link (in last column on the right)
- CLICK on the report you want to view

Reports are uploaded to the NYSBOE website during regular business hours only. It may take one or two business days for your report to appear on our website after your email is sent. After that period, contact NYSBOE at 1-800-458-3453 if the report is missing or inaccurate.

## **NEW YORK STATE BOARD OF ELECTIONS**

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