EasyVote User Guide



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Creating an EasyVote Account

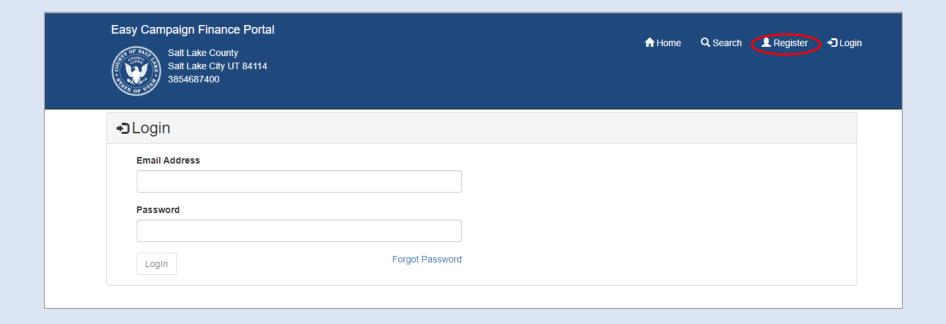


Registering

Creating an EasyVote Account

Go to EasyVote.

Click on Register.



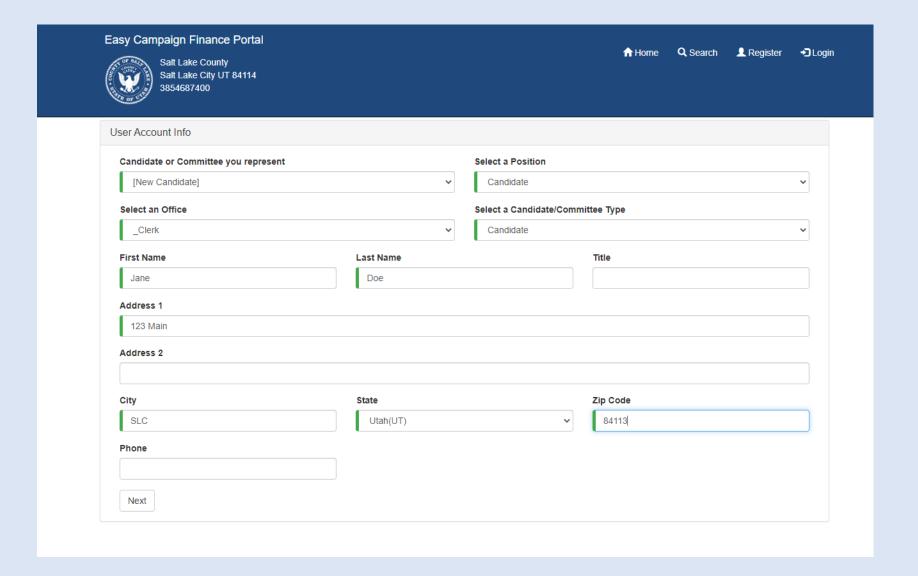


User Account Info

Creating an EasyVote Account

Complete all fields marked with a red or green bar.

Select Next.



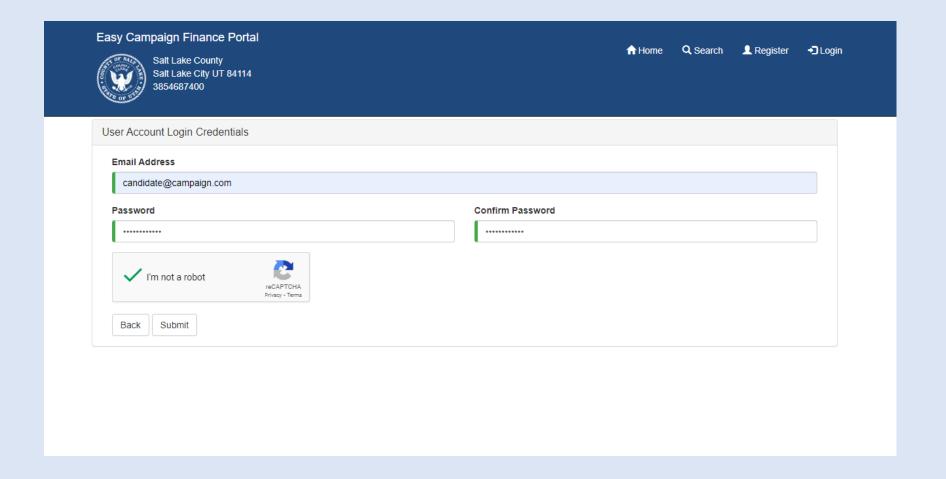


Login

Creating an EasyVote Account

Enter your email address and password.

Select Submit.



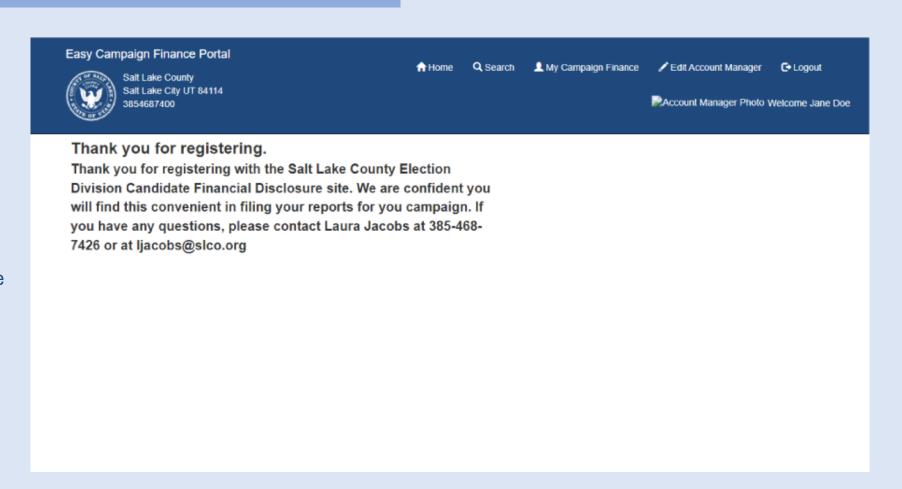


Review and Approval

Creating an EasyVote Account

The Election Division will review your account and accept your registration.

While registrations may be approved the same day, we reserve the right to take up to three days to approve your registration.



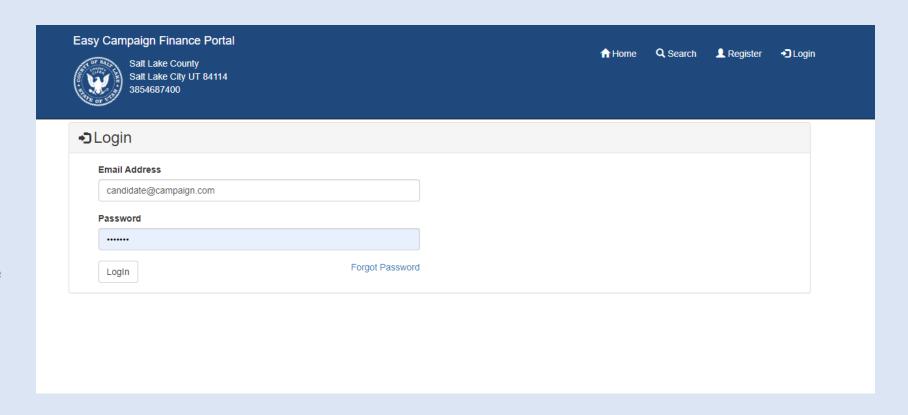


Login

Creating an EasyVote Account

You will receive an email once your account has been approved.

Once your account has been approved, you will be able to see your campaign portal.





Navigating EasyVote

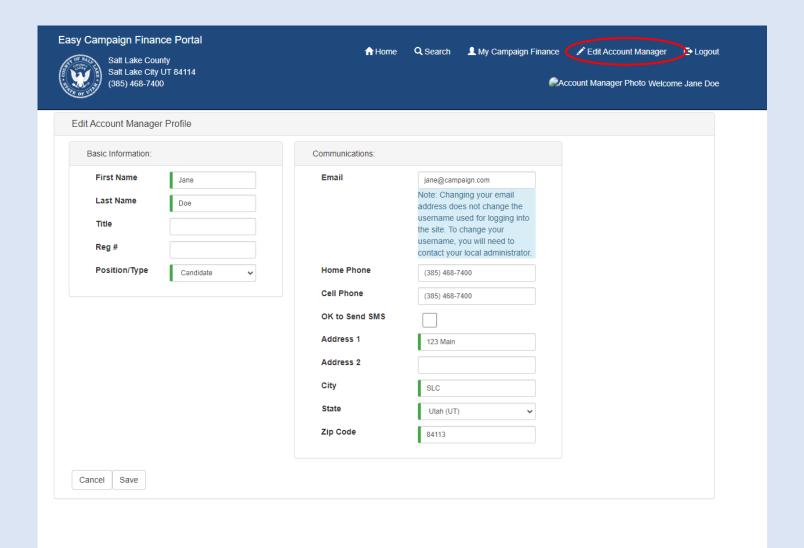


Navigating EasyVote

Updating Account Information

Edit Account Manager allows you update your contact info.

It's recommended that you check OK to Send SMS and provide a cell phone number. This will allow you to reset your password via text.

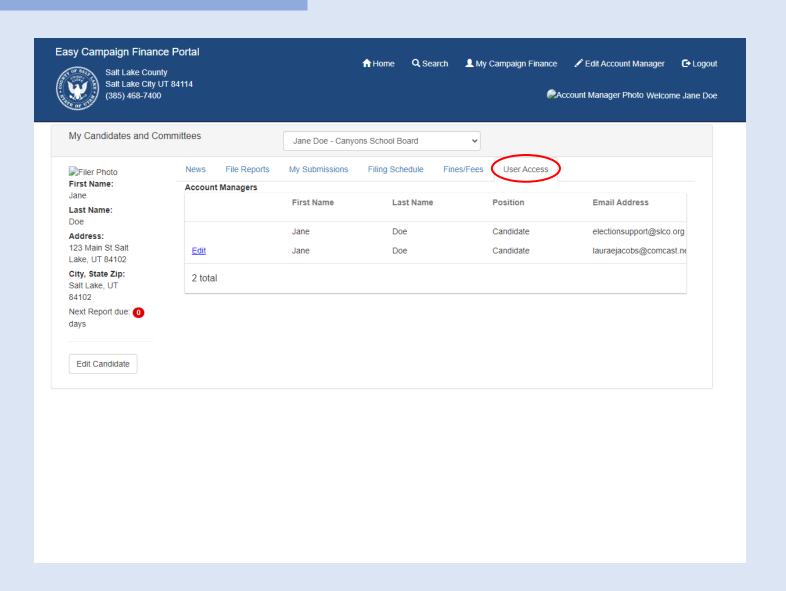




Navigating EasyVote

Updating User Account Access

Under User Access, you can check to see and change who has access to your campaign finance portal.

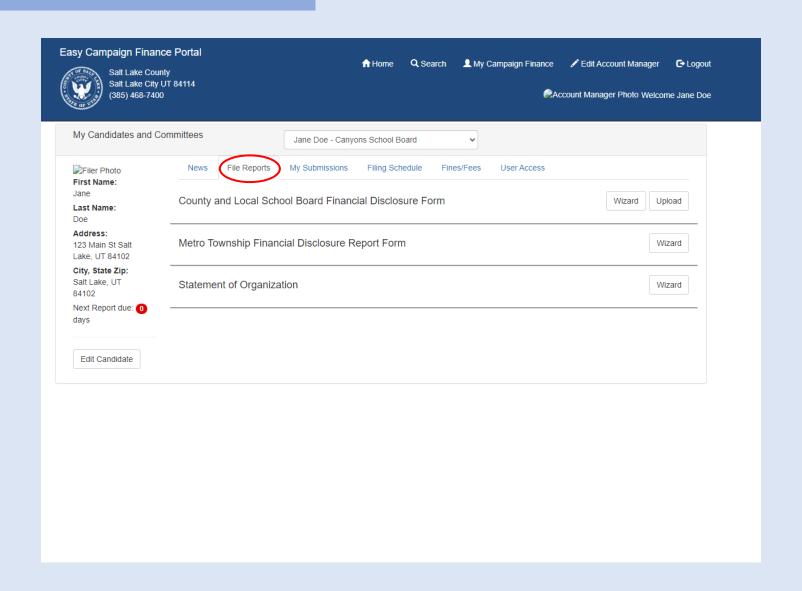




Navigating EasyVote

Where to File Reports

The Statement of Organization and Financial Disclosure Forms are found under File Reports.

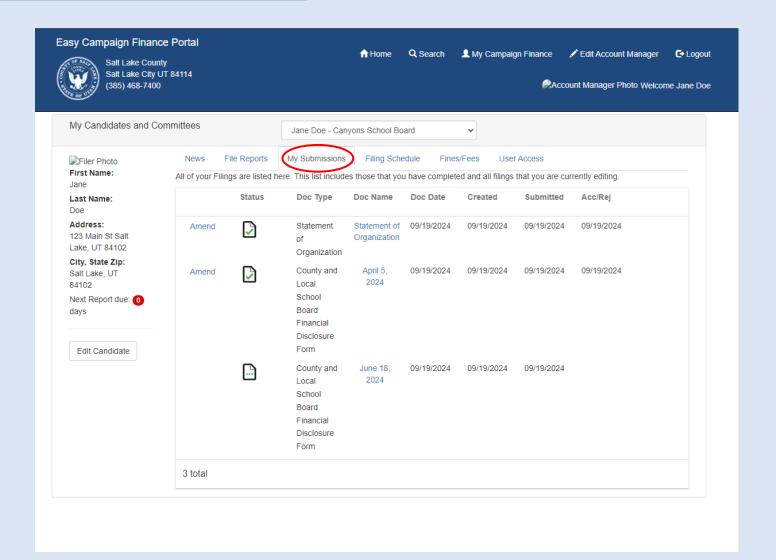




Navigating EasyVote

Where to See Filed Reports

Previously submitted Financial Disclosure Reports and the Statement of Organization are found under My Submissions.





Filing a Report: Statement of Organization

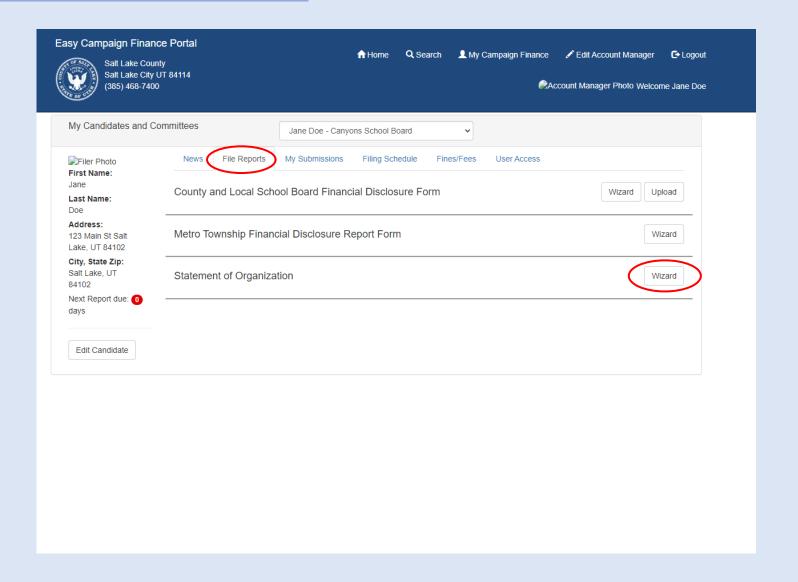


File Reports

Statement of Organization

To file a Statement of Organization, select File Reports.

Select the Wizard button next to Statement of Organization.





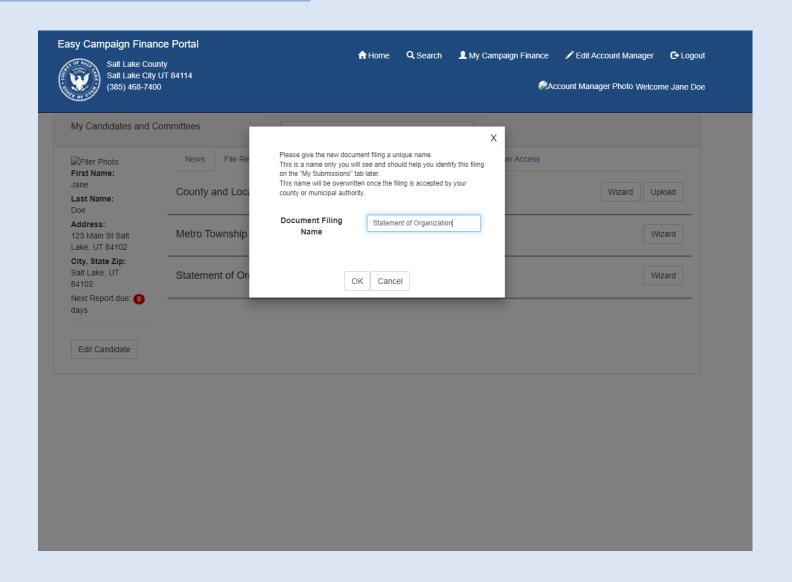
Document Name

Statement of Organization

It's recommended that you name your document after the type of document *or* the due date.

Ex. Statement of Organization *or* April 5, 2024.

Click OK.



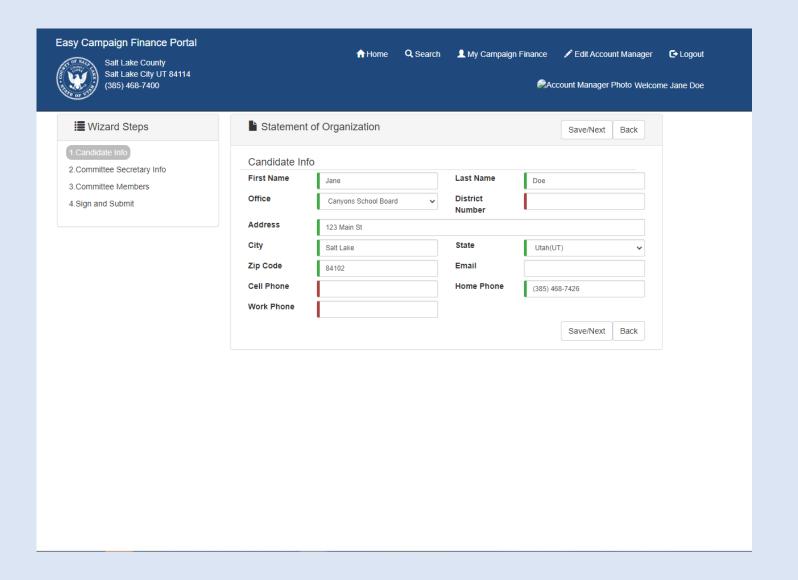


Candidate Info

Statement of Organization

Complete all fields marked with a red or green bar.

Click Save/Next.





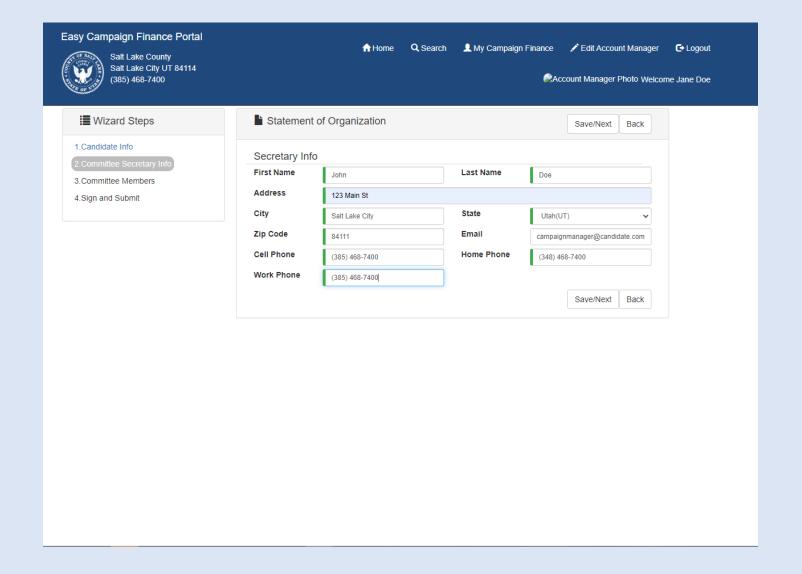
Secretary Info

Statement of Organization

A campaign secretary may submit financial disclosures on your behalf. Their information can be entered here.

If you choose to not have a campaign secretary, please enter your information again.

Click Save/Next.

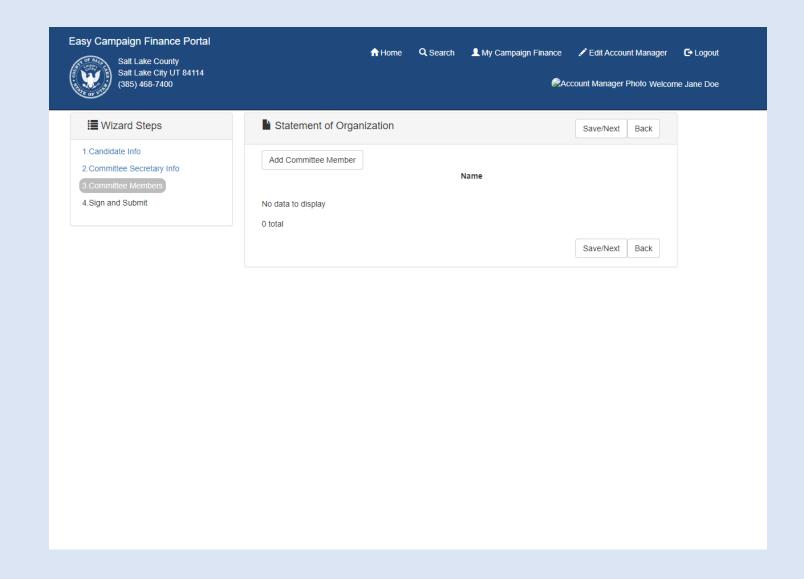




Committee Members

Statement of Organization

If you wish to add committee members, you can do so here.





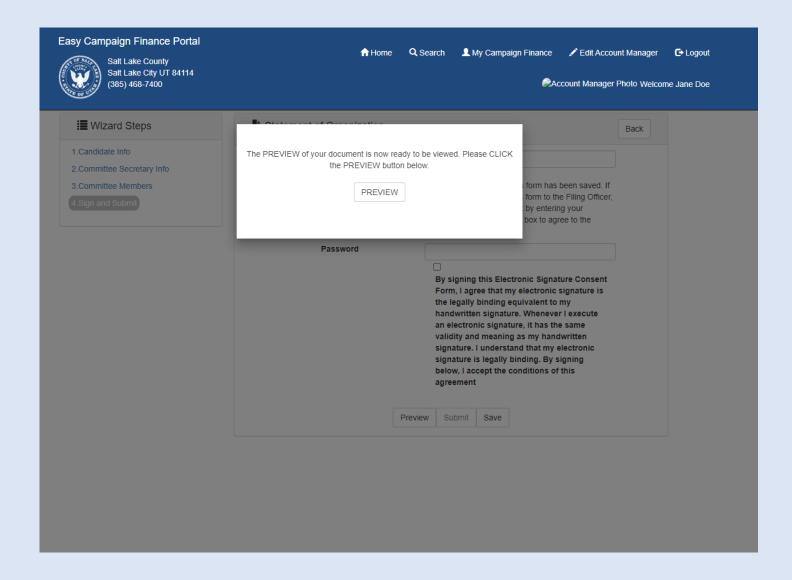
Preview

Statement of Organization

You must review your Statement of Organization to verify that the information entered is correct.

Select Preview. This will open a new window or tab with the Statement of Organization.

Once you have confirmed the information is correct, click back on the EasyVote window or tab.



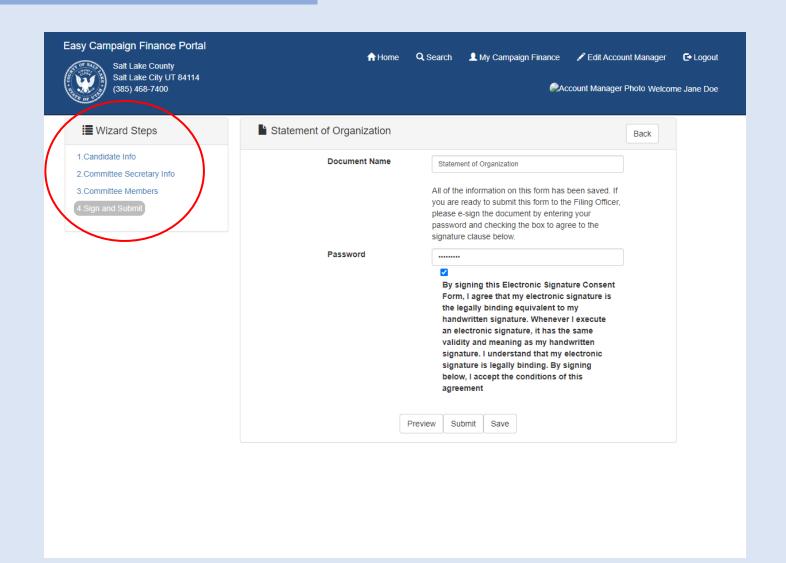


Corrections

Statement of Organization

If you noticed any information you would like to change, you can navigate back to a previous page and make the corrections.

Quick links to previous pages can be found under the Wizard Steps, highlighted here.





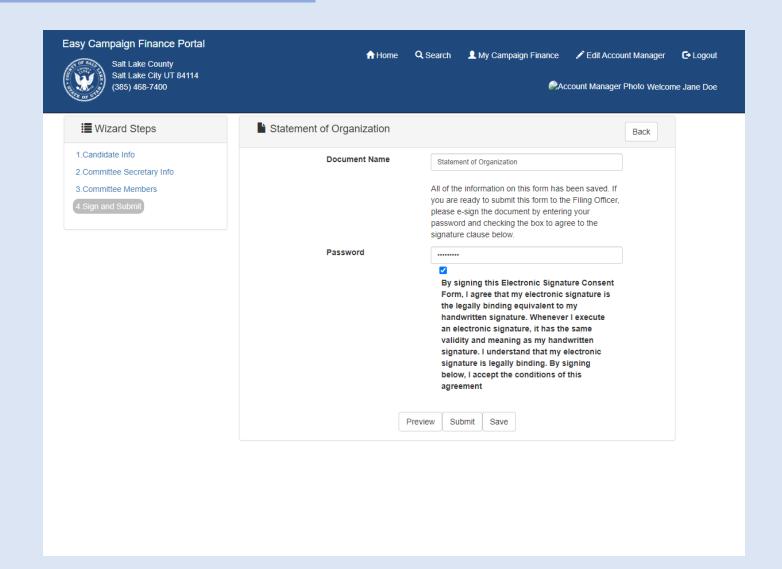
Signing

Statement of Organization

To submit your Statement of Organization, you must enter your password, check the box, and click submit.

You will receive an email that your submission has been received.

You will then receive an email once your document has been accepted or rejected.





Filing a Report: Financial Disclosure



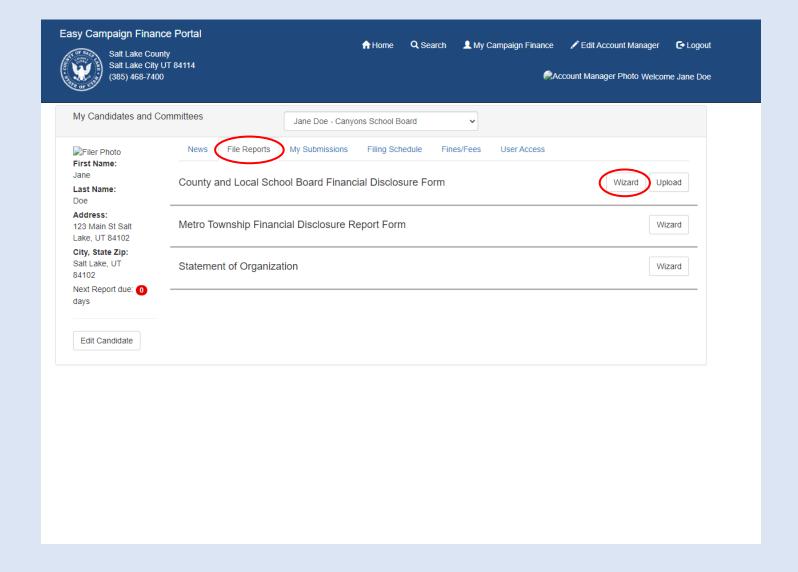
File Reports

Financial Disclosure

To file a Financial Disclosure Report, select File Reports.

Financial Disclosure Reports can be completed through the Wizard tool or uploaded. It is strongly recommended that you use the Wizard tool.

Click Wizard.





File Name

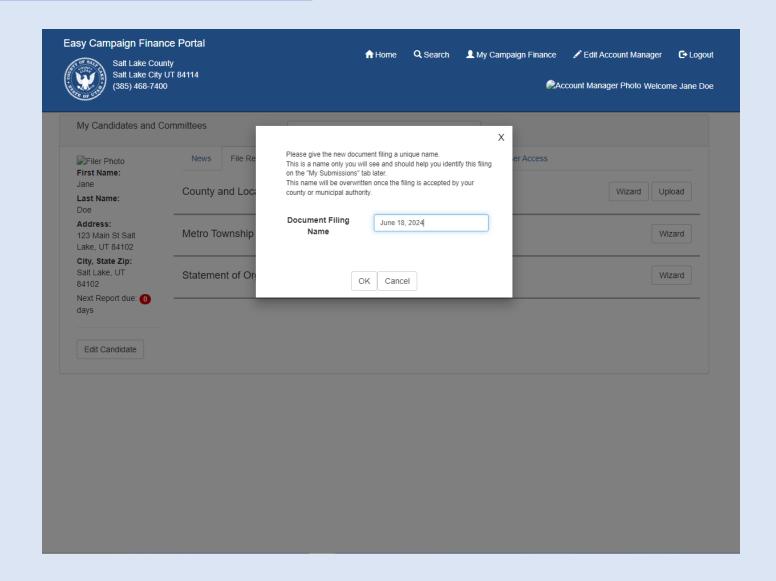
Financial Disclosure

This will open a window prompting you to name your report.

It's recommended you use the date the report is due as the name.

Ex. June 18, 2024

Click OK.





Candidate Info

Financial Disclosure

Do NOT click copy.

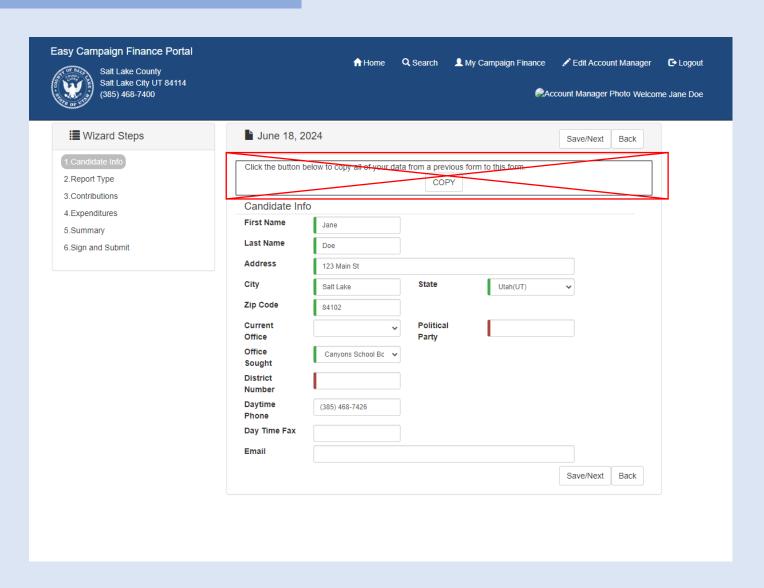
Boxes with a red or green tab must be completed with the candidate's info.

If the race is non-partisan (local school board) write N/A for the political party.

If the race doesn't have a district number (countywide) write N/A.

Click Save/Next.





Report Type

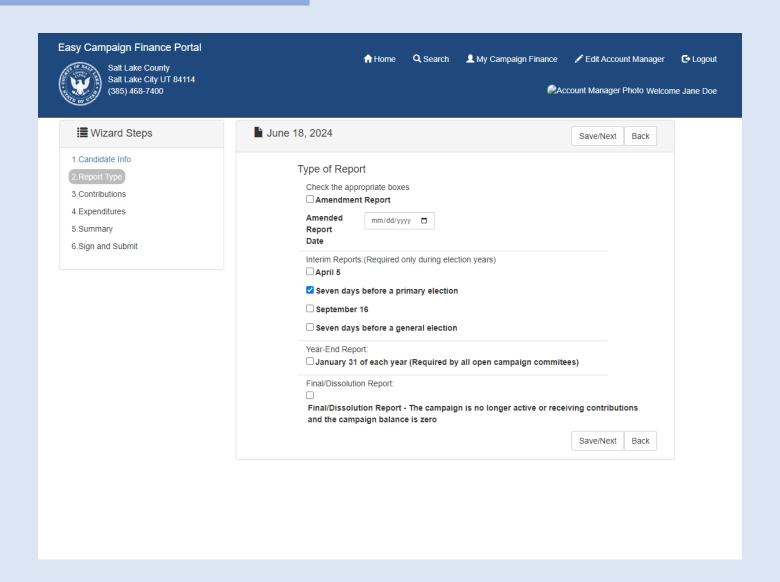
Financial Disclosure

Select the Report Type. This is the day the report is due.

If you need to file an amendment, go to <u>Filing a Financial Disclosure</u>
Amendment.

If you are dissolving your campaign, go to <u>Dissolving your Campaign</u>.

Click Save/Next.



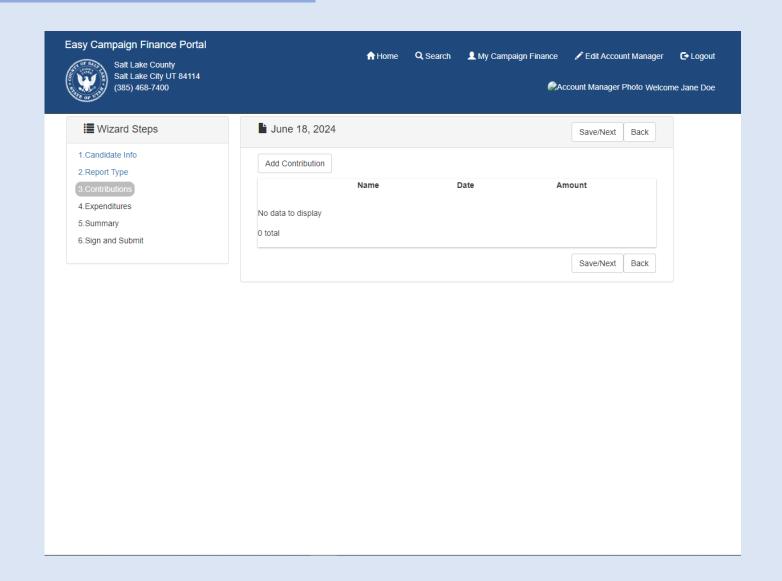


Contributions

Financial Disclosure

Each contribution must be added individually.

Click Add Contribution.





Contributions

Financial Disclosure

Toggle whether the contribution is from an individual or an organization.

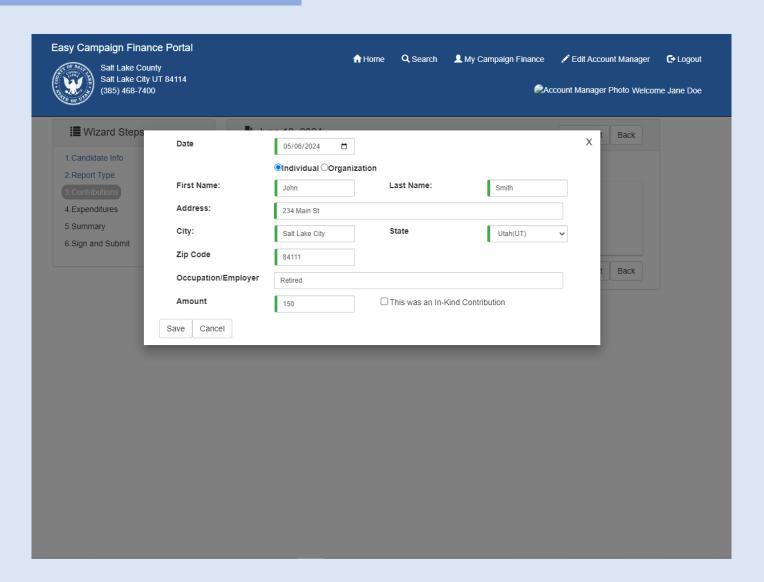
You must enter the date you received the contribution, the contributor's name and address, and the amount of the contribution.

Contributions of \$200 or more must include the contributor's occupation/employer.

Click Save.

*If you navigate away from this page without saving, it will not save the information you entered.





Contributions In-Kind

Financial Disclosure

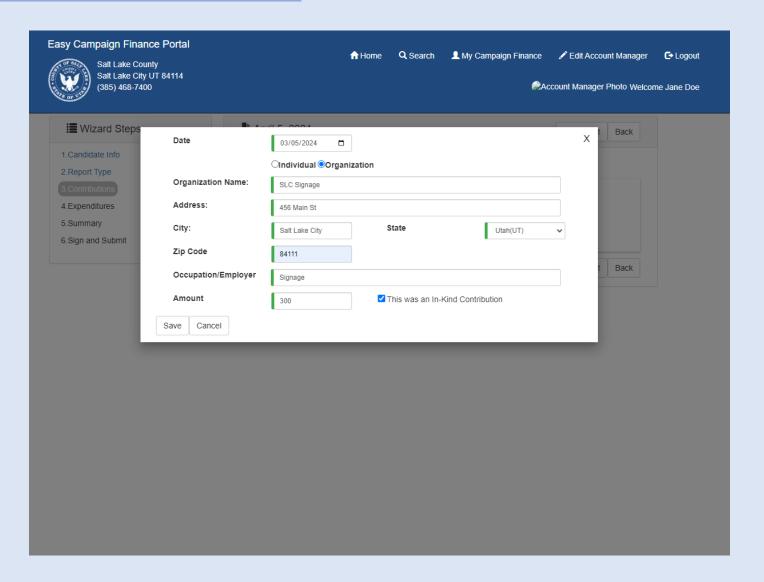
In-kind donations are non-monetary contributions. They can be either goods or services. You must record the amount or the estimated amount of the in-kind contribution.

Enter the necessary information.

Check the In-Kind box.

This entry will also need to recorded an in-kind expenditure.



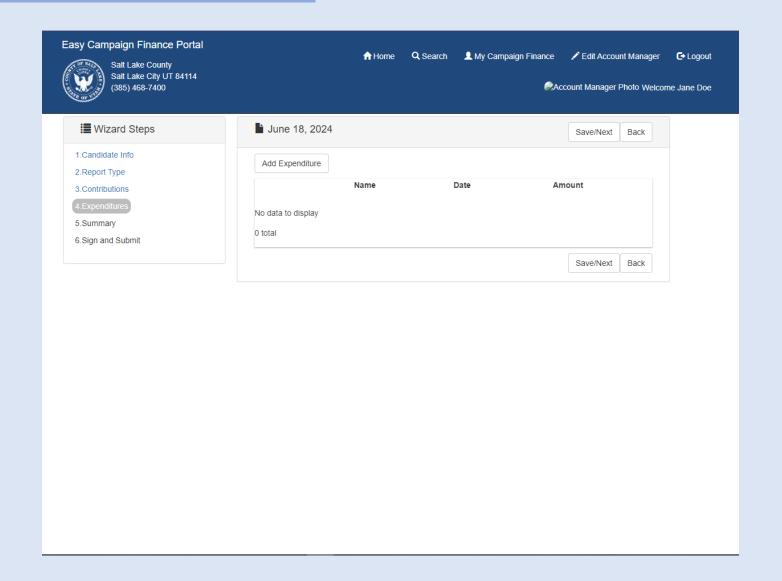


Expenditures

Financial Disclosure

Each expenditure must be added individually.

Click Add Expenditure.





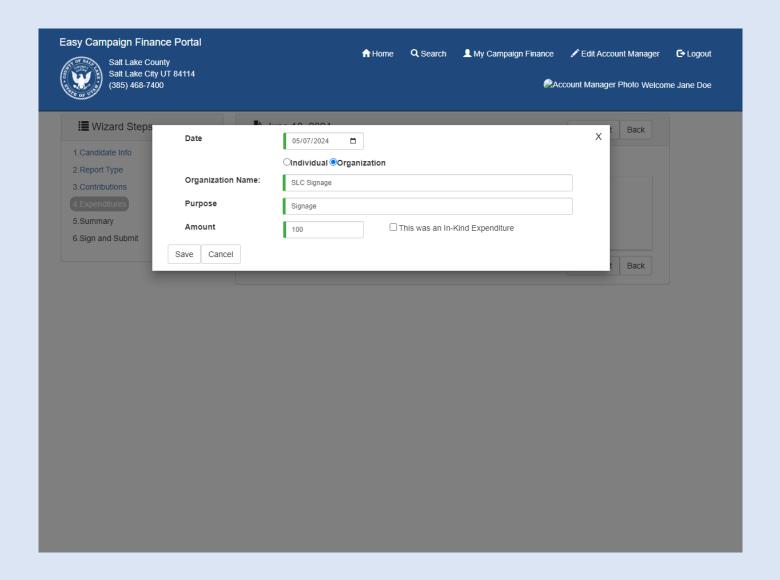
Expenditures

Financial Disclosure

You must enter the date of the expenditure, who is receiving the money, the purpose of the expense, and the amount of the expenditure.

Click Save.

*If you navigate away from this page without saving, it will not save the information you entered.





Expenditures In-Kind

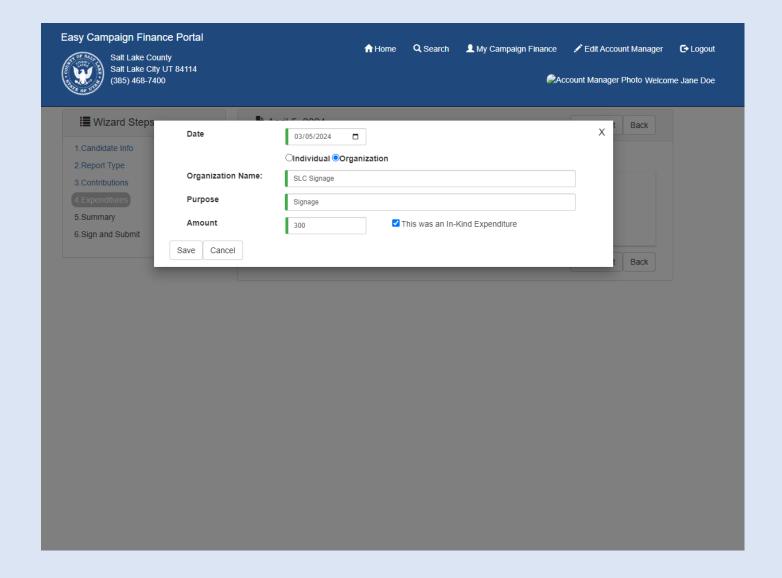
Financial Disclosure

An in-kind donation must also be recorded as an expenditure.

Enter the necessary information.

Check the In-Kind box.

Click Save.



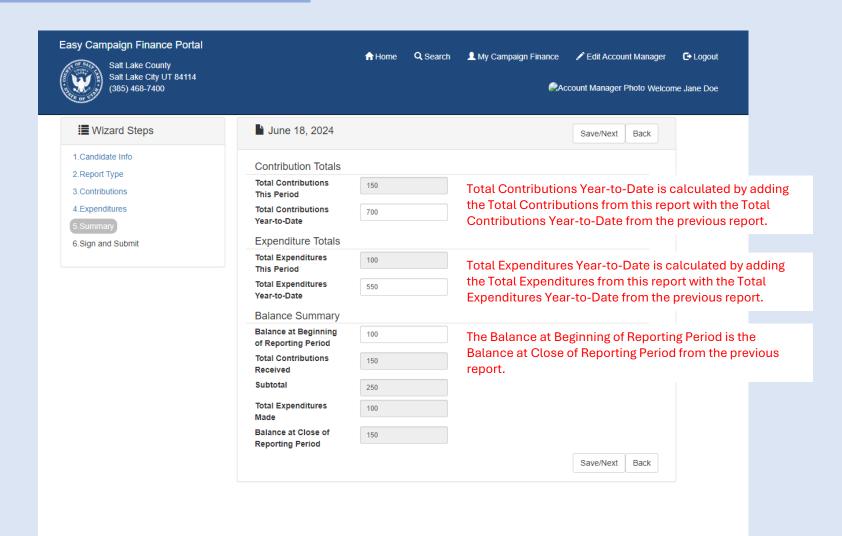


Summary

Financial Disclosure

You must hand enter the year-todate contributions and expenditures. These are the totals for the year.

You must also hand enter the Balance at Beginning of Reporting Period. This is your carryover balance from your previous report.





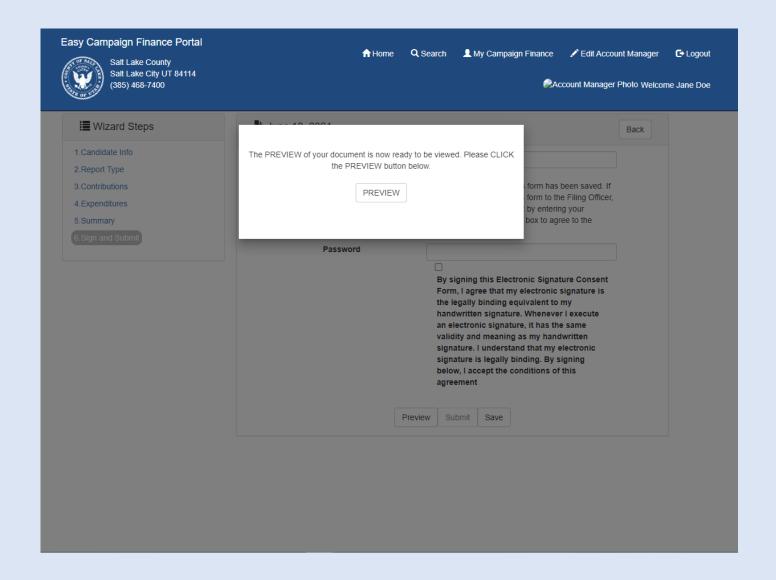
Preview

Financial Disclosure

You must review your Financial Disclosure Report to verify that the information entered is correct.

Select Preview. This will open a new window or tab with the Statement of Organization.

Once you have confirmed the information is correct, click back on the EasyVote window or tab.



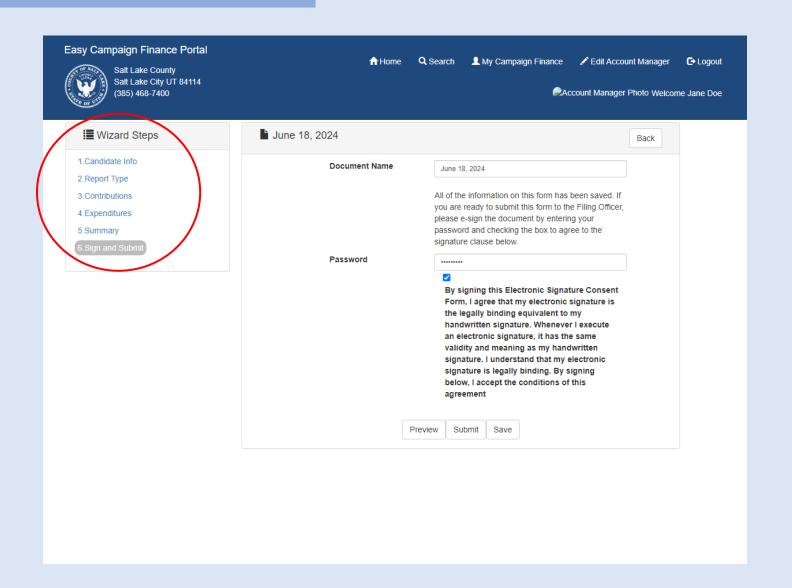


Corrections

Financial Disclosure

If you noticed any information you would like to change, you can navigate back to a previous page and make the corrections.

Quick links to previous pages can be found under Wizard Steps, highlighted here.





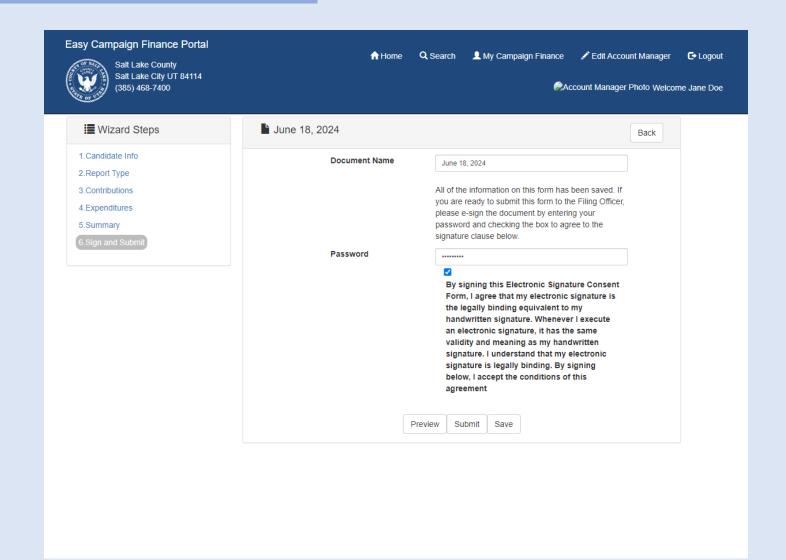
Sign And Submit

Financial Disclosure

To finalize your report, enter your password, select the box, and select Submit.

You will receive an email that your submission has been received.

You will then receive an email once your document has been accepted or rejected.

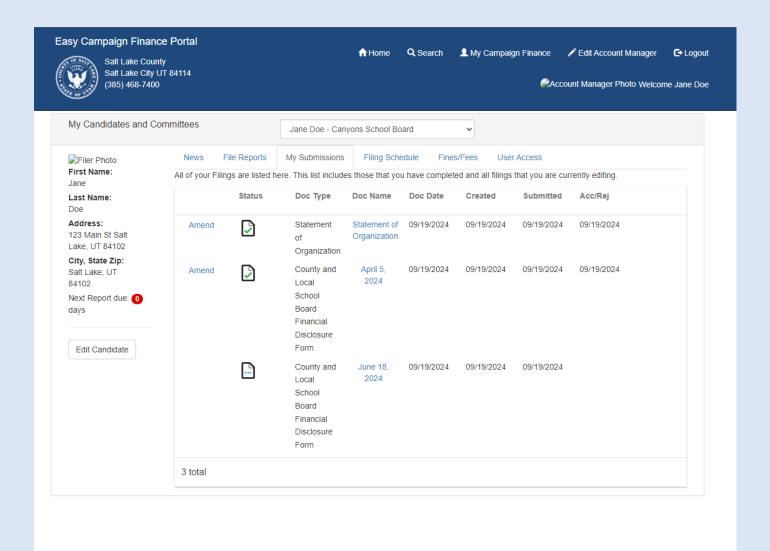




My Submissions

Financial Disclosure

You can verify that your report has been submitted by reviewing the "My Submissions" window.





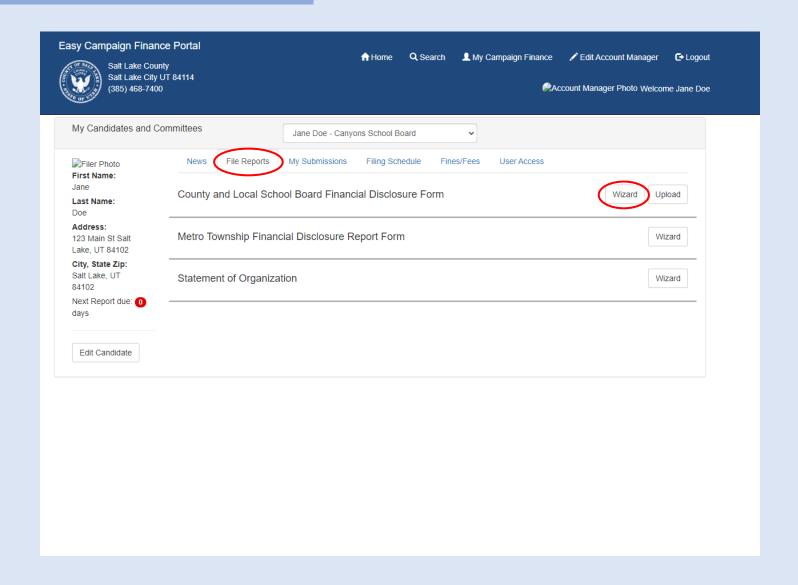
Filing a Report: Financial Disclosure Amendment



File Reports

Financial Disclosure- Amendment

To file an Amended Financial
Disclosure Report, select the
Wizard button next to County and
Local School Board Financial
Disclosure Form.





File Name

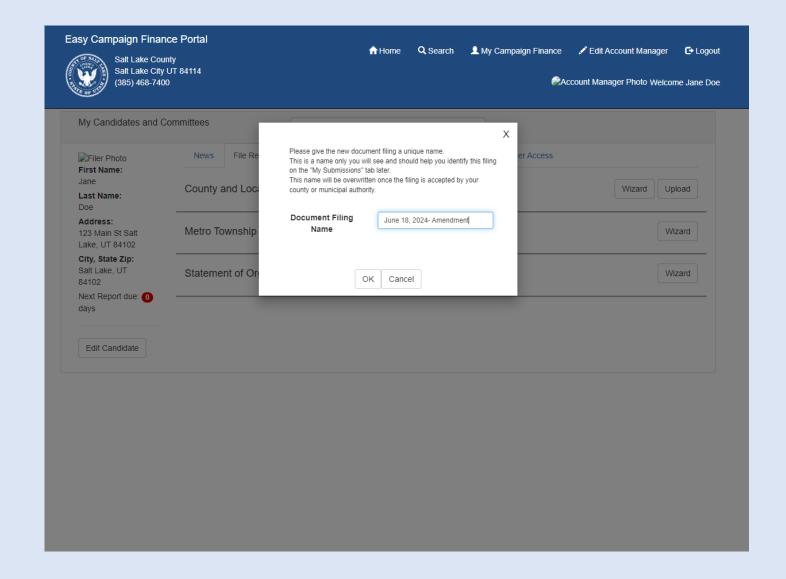
Financial Disclosure- Amendment

This will open a window prompting you to name your report.

It's recommended you use the date the report is due plus amended as the report name.

Ex. June 18, 2024- Amended

Click OK.





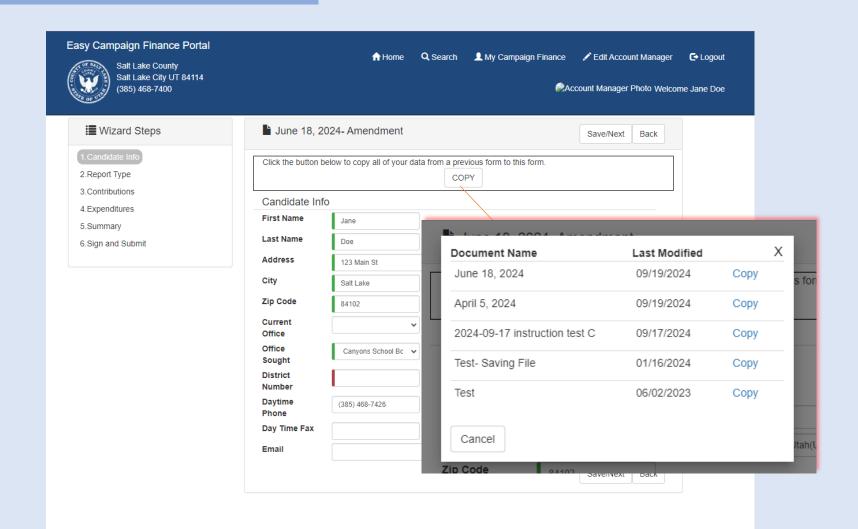
Candidate Info

Financial Disclosure- Amendment

Only in the case of an amendment will you select copy.

You will be given a list of previous reports. Select the report with the data you would like to copy. Click Copy next to the correct report.

Click Save/Next.





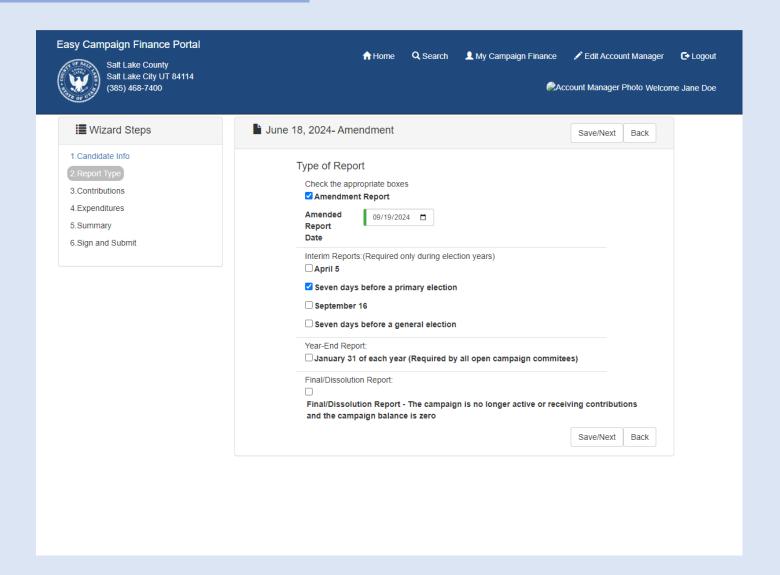
Report Type

Financial Disclosure- Amendment

Check Amendment Report and select the current date.

Check the date of the report you are amending.

Click Save/Next.

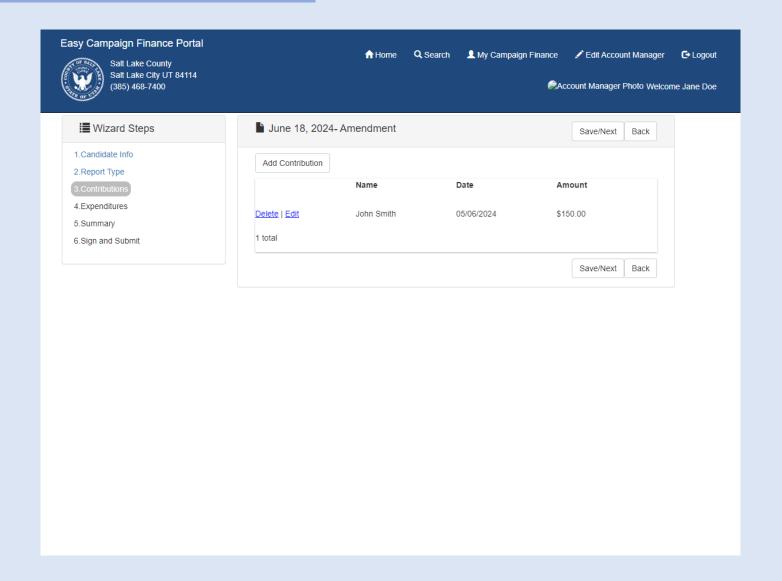




Contributions

Financial Disclosure- Amendment

If you need to add a missing contribution, add it here.

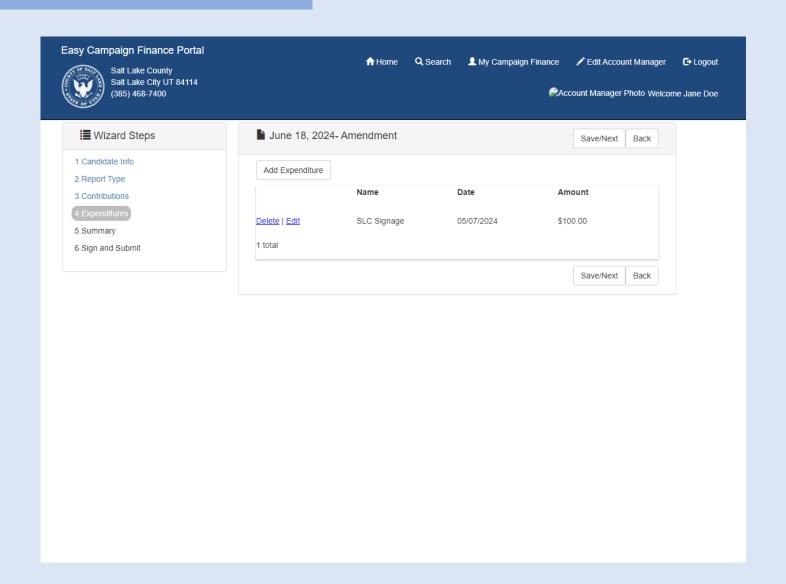




Expenditures

Financial Disclosure- Amendment

If you need to add a missing expenditure, add it here.



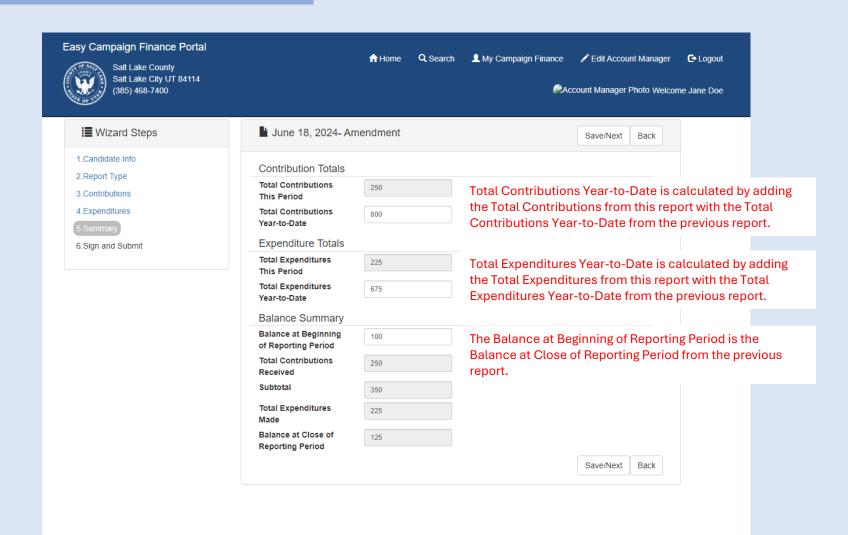


Summary

Financial Disclosure- Amendment

Confirm that the year-to-date totals and the beginning balance are correct.

If you made any changes to your contributions or expenditures, you will need to recalculate your end-of-year totals.





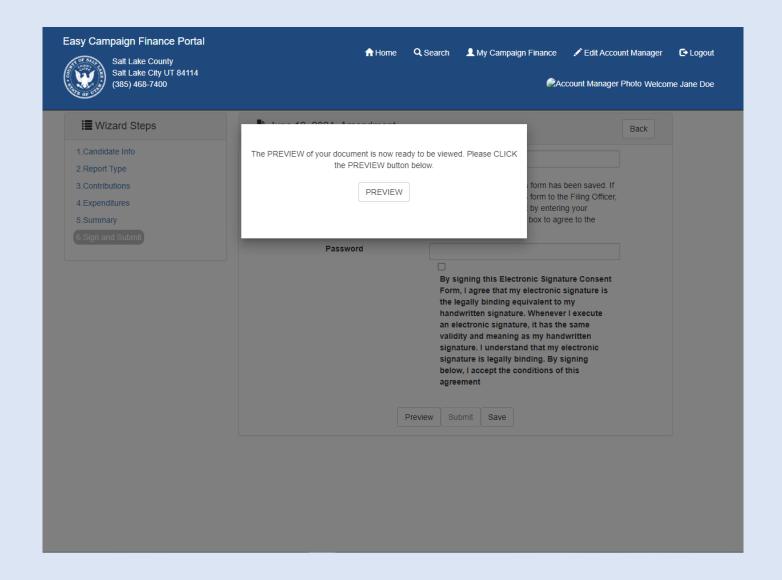
Preview

Financial Disclosure- Amendment

You must review your Financial Disclosure Amendment Report to verify that the information entered is correct.

Select Preview. This will open a new window or tab with the Statement of Organization.

Once you have confirmed the information is correct, click back on the EasyVote window or tab.



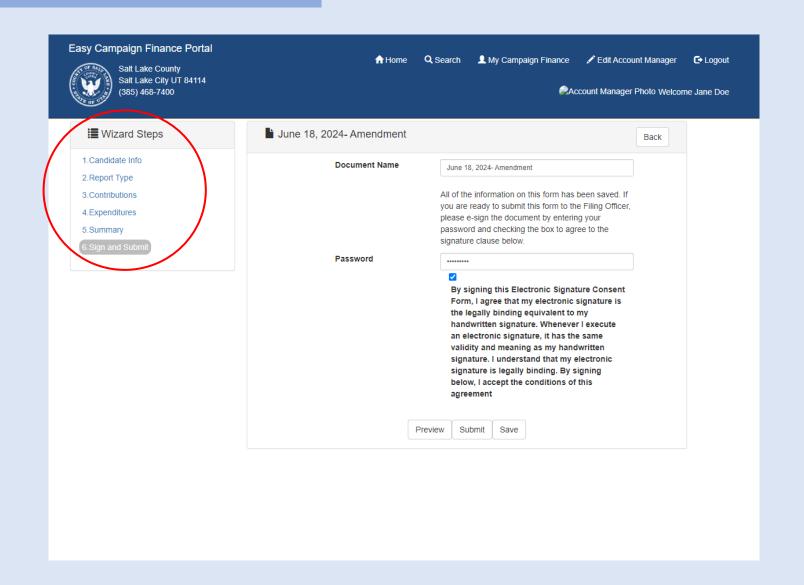


Corrections

Statement of Organization

If you noticed any information you would like to change, you can navigate back to a previous page and make the corrections.

Quick links to previous pages can be found under Wizard Steps, highlighted here.





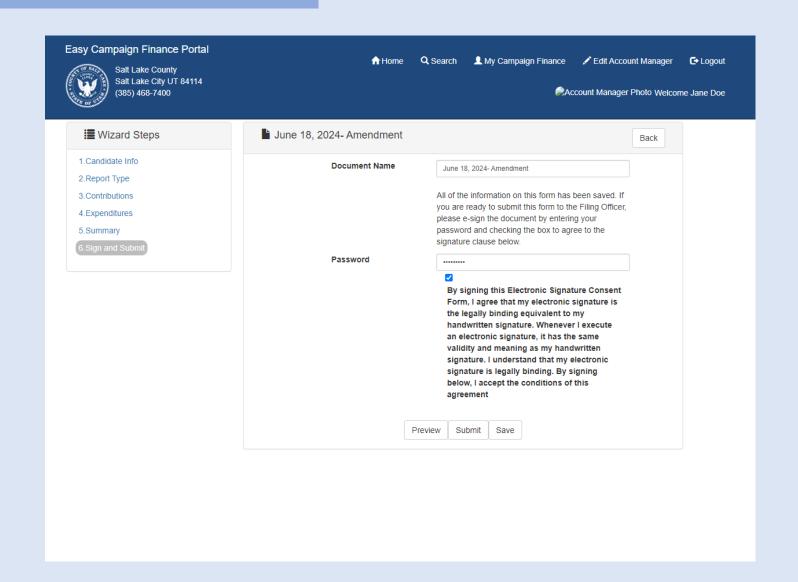
Sign And Submit

Financial Disclosure- Amendment

To finalize your report, enter your password, select the box, and select Submit.

You will receive an email that your submission has been received.

You then receive an email once your document has been accepted or rejected.

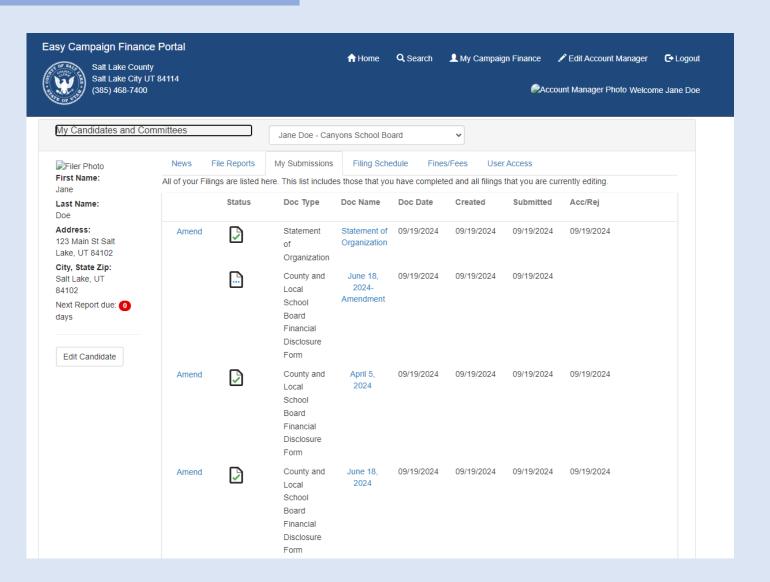




My Submissions

Financial Disclosure- Amendment

You can verify that your report has been submitted by reviewing the "My Submissions" window.





Filing a Report: Final/ Dissolution Disclosure



Final/ Dissolution Disclosure

Final/ Dissolution Disclosure

A Final/ Dissolution Disclosure Report is filed when you are dissolving your campaign committee and closing your campaign account. Your campaign account must have a \$0 balance to file the Final/ Dissolution Report.

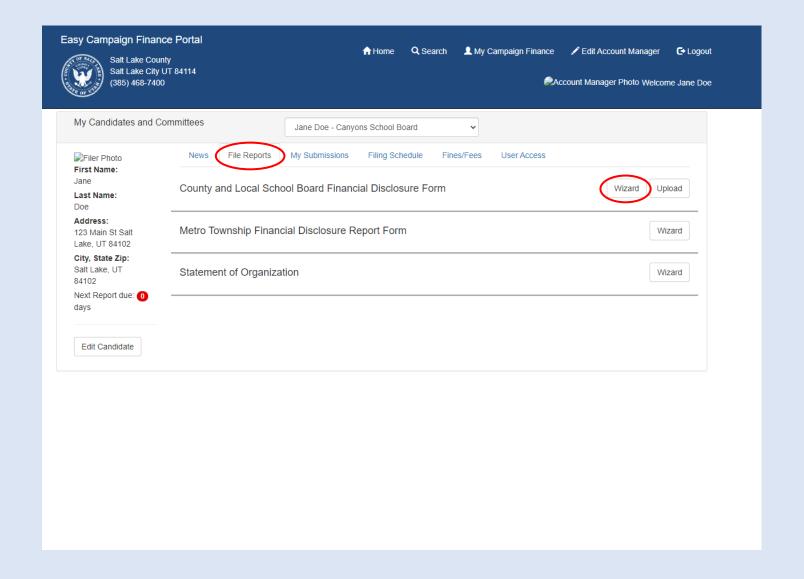
You must also submit a <u>Dissolution of a Candidate Campaign Committee</u> form with the Salt Lake County Election Office. It can be emailed to <u>ljacobs@saltlakecounty.gov</u>.



Wizard Tool

Final/ Dissolution Disclosure

To file a Final/Dissolution Report, select the Wizard button next to County and Local School Board Financial Disclosure Form.





File Name

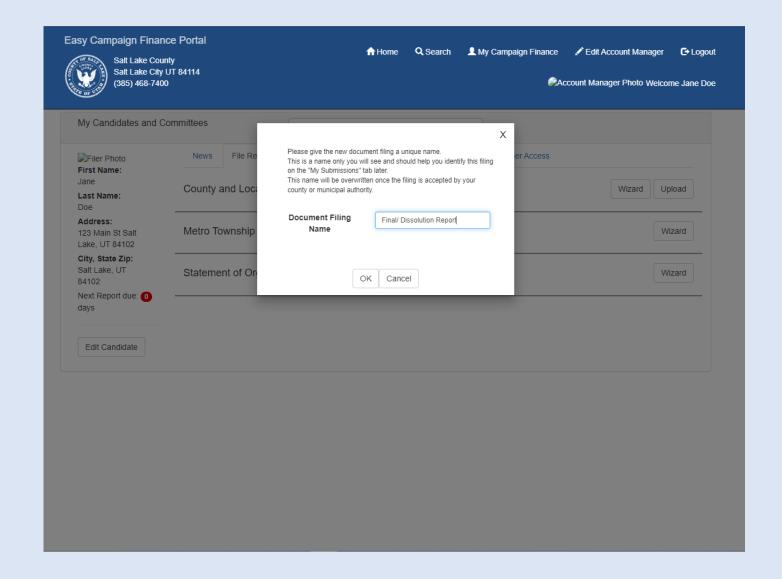
Final/ Dissolution Disclosure

This will open a window prompting you to name your report.

It's recommended you use the type of report as the name.

Ex. Final/Dissolution Disclosure

Click OK.



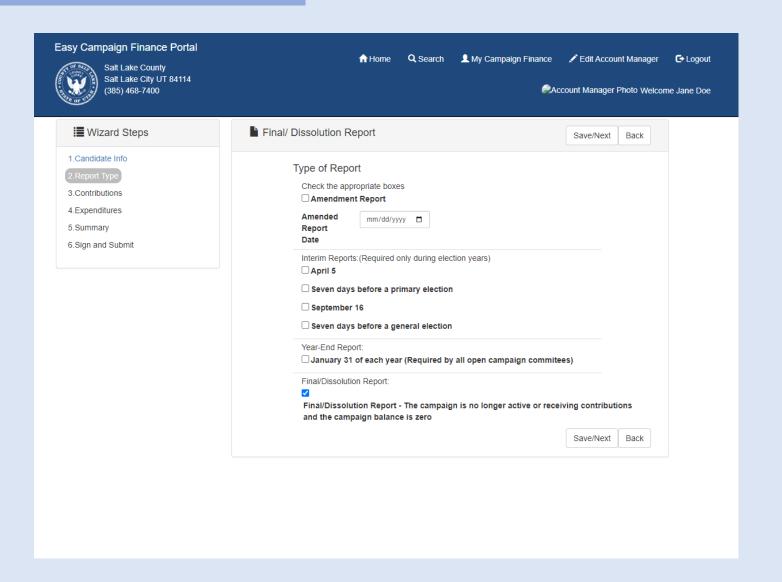


Report Type

Final/ Dissolution Disclosure

Check Final/ Dissolution Report.

Click Save/Next.

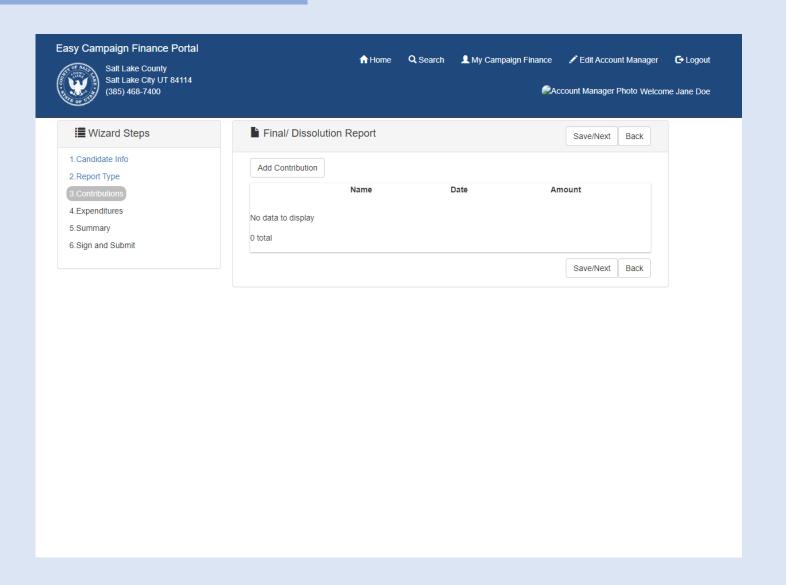




Contributions

Final/ Dissolution Disclosure

If you need to add a contribution, add it here.

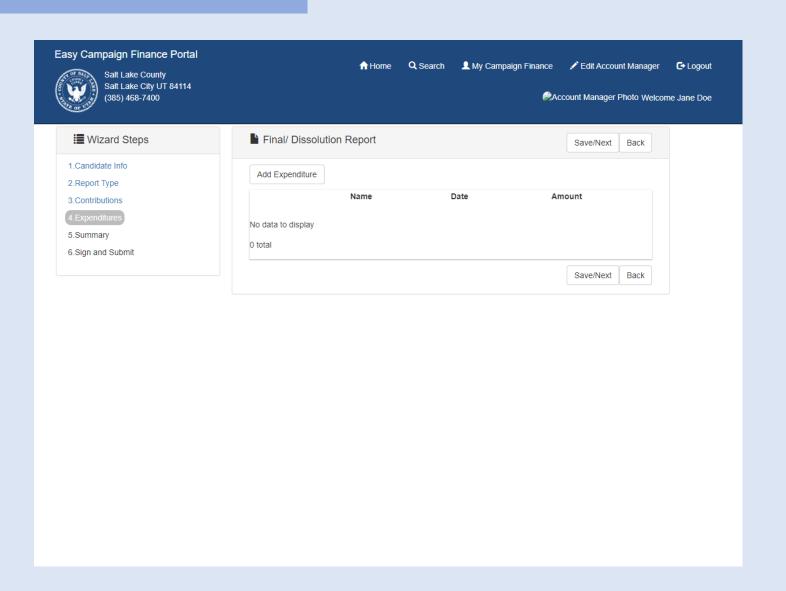




Expenditures

Final/ Dissolution Disclosure

If you need to add an expenditure, add it here.



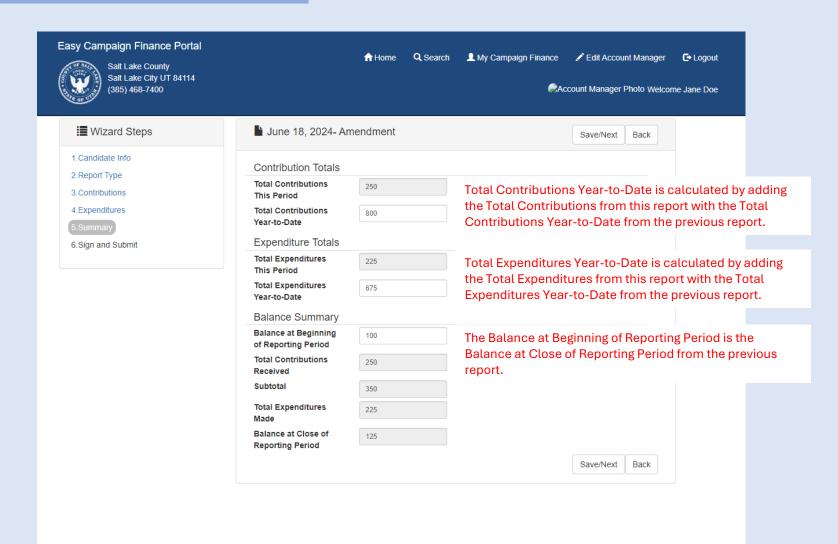


Summary

Final/ Dissolution Disclosure

Confirm that the year-to-date totals and the beginning balance are correct.

The Balance at Close of Reporting Period must be \$0.





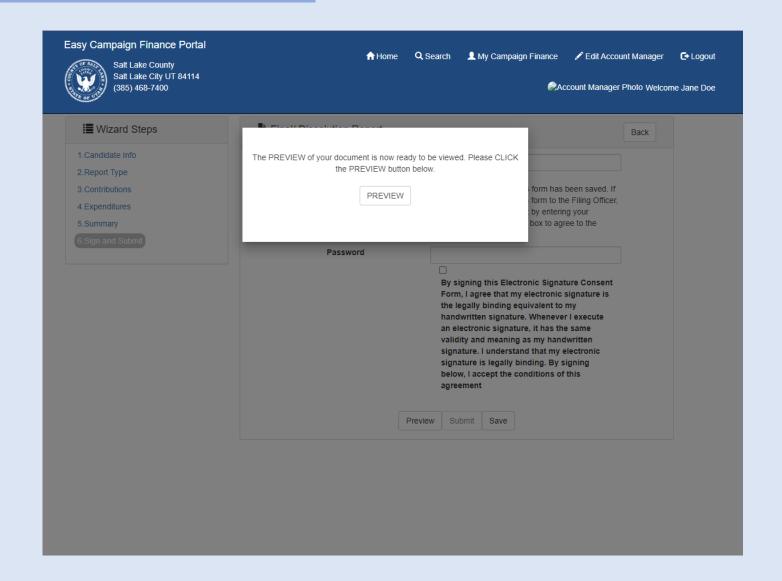
Preview

Final/ Dissolution Disclosure

You must review your Final/Dissolution Report to verify that the information entered is correct.

Select Preview. This will open a new window or tab with the Statement of Organization.

Once you have confirmed the information is correct, click back on the EasyVote window or tab.



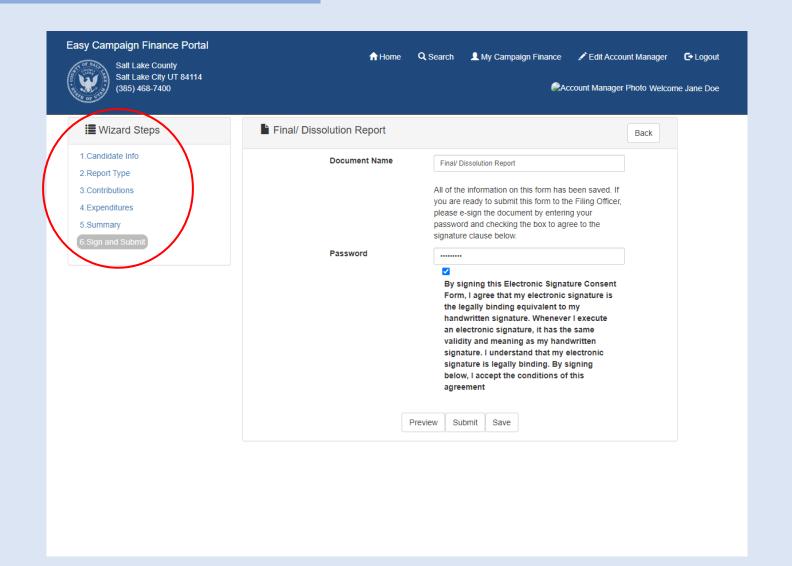


Corrections

Final/ Dissolution Disclosure

If you noticed any information you would like to change, you can navigate back to a previous page and make the corrections.

Quick links to previous pages can be found under Wizard Steps, highlighted here.





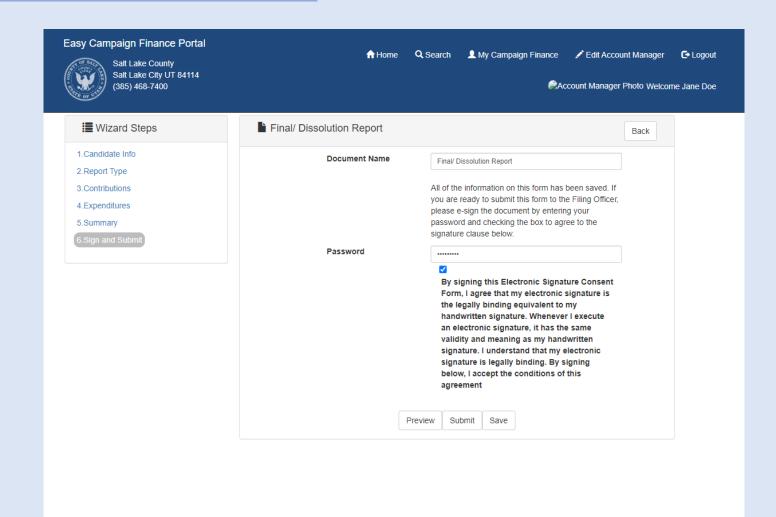
Sign And Submit

Final/ Dissolution Disclosure

To finalize your report, enter your password, select the box, and click Submit.

You will receive an email that your submission has been received.

You then receive an email once your document has been accepted or rejected.

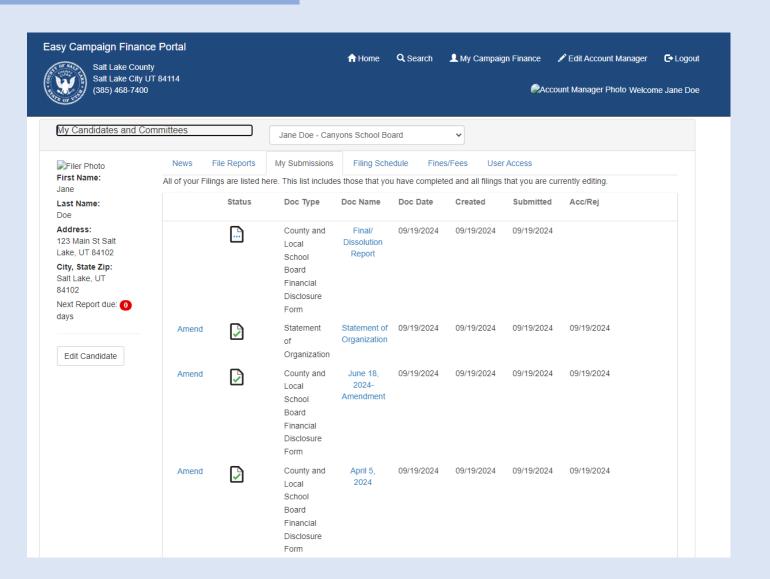




My Submissions

Final/ Dissolution Disclosure

You can verify that your report has been submitted by reviewing the "My Submissions" window.





Viewing Published Reports



Viewing Published Reports

Public Search

Reports that have been accepted, are redacted and published. Those reports can by found by clicking on the Home button.

