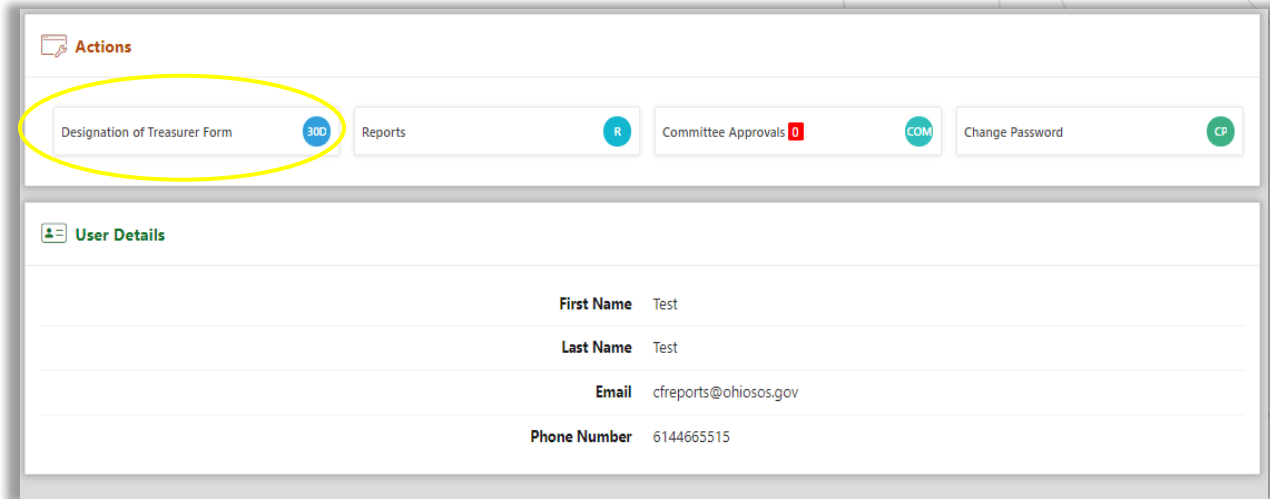


BOe-FILE COMMITTEE USER GUIDE

DESIGNATION OF TREASURER SUBMISSION



The screenshot shows a user account dashboard. At the top, there is an 'Actions' section with four buttons: 'Designation of Treasurer Form' (circled in yellow), 'Reports', 'Committee Approvals', and 'Change Password'. Below this is a 'User Details' section with the following information:

First Name	Test
Last Name	Test
Email	cfreports@ohiosos.gov
Phone Number	6144665515

- After creating a user account, you will land on the user account home page.
- Begin creating a Designation of Treasurer (DOT) by clicking "Designation of Treasurer Form."



The screenshot shows a button labeled 'New Committee' circled in yellow, and another button labeled 'Update' to its right.

- Register a new committee by selecting "New Committee."
- Reminder: existing committees that are first time electronic filers are considered New Committees for BOe-file purposes and committees should take this opportunity to review and provide updated committee contact information.

The screenshot shows the 'Designation of Treasurer - Form 30-D' application. At the top, there is a progress bar with five steps: 'Committee Type' (highlighted with a yellow dot), 'Detailed Information', 'Committee Information', 'Treasurer Information', and 'Deputy Treasurer Information'. Below the progress bar, the 'Committee Type' section is displayed. It contains the text 'Please Select a Committee Type' followed by four radio button options: 'Candidate', 'PAC (Political Action Committee)', 'PCE (Political Contributing Entity)', and 'Political Party'. The 'Candidate' option is circled in yellow. To the right of these options is a dropdown menu labeled 'Select County Filing Location'. A red 'Cancel' button is located at the bottom left of the form.

- Select the appropriate committee type.

The screenshot shows the 'Designation of Treasurer - Form 30-D' application. The progress bar now shows 'Committee Type' as completed. In the 'Committee Type' section, the 'Political Party' radio button is selected. A dropdown menu is open, displaying a list of political parties: 'DEMOCRAT', 'GREEN', 'LIBERTARIAN', 'OTHER', and 'REPUBLICAN'. The 'REPUBLICAN' option is highlighted with a yellow circle. Below the dropdown menu, there is a text input field with the placeholder 'Please Select A Political Party'. A red 'Cancel' button is on the bottom left, and a green 'Next' button is on the bottom right.

- If Political Party is selected, an additional dropdown box will appear.
- Click "Please Select A Political Party" to select the appropriate political party.
- Other entity types will not see this option as it is not applicable.

- Click “Select County Filing Location” to select the appropriate county for your committee.
- For committees representing districts that overlap multiple counties, see Chapter 2 of the [Campaign Finance Handbook](#) for guidance on selecting the appropriate county.
- Click “Next” to proceed.

- If the entity is a PAC, select the appropriate type of sponsorship for your political action committee by clicking within one of the fields.
- For questions related to sponsored PACs, see Chapter 6 and Chapter 9 of the Campaign Finance Handbook.
- If the entity is not a sponsored PAC, select “Not Sponsored” and proceed.

Designation of Treasurer – Form 30-D ✕

● Committee Type
● **Detailed Information**
● Committee Information
● Treasurer Information
● Deputy Treasurer Information

PAC (Political Action Committee) Information

PAC is sponsored by: * ?

Labor Organization
 Corporation
 Not Sponsored

Is this a Ballot Issue PAC? * ?

No
 Yes

List any Affiliated PACs ?

Back
Cancel
Next

- If an entity is a sponsored PAC, additional fields will appear.
- Enter the name of the sponsoring corporation or labor organization, as appropriate.
- If applicable, click "acronym used" to list any associated acronym used by the sponsored corporation or labor organization.

Designation of Treasurer – Form 30-D ✕

✔ ● ● ● ●

Committee Type **Detailed Information** Committee Information Treasurer Information Deputy Treasurer Information

PAC (Political Action Committee) Information

PAC is sponsored by: *

Labor Organization ?
 Corporation
 Not Sponsored

Is this a Ballot Issue PAC? *

No Yes ?

List any Affiliated PACs ?

Back
Cancel
Next

- If the committee is a Ballot Issue PAC, click “Yes.”
- If your committee is not a Ballot Issue PAC, click “No.”
- For guidance on Ballot Issue Committees, see Chapter 8 of the [Campaign Finance Handbook](#).

Designation of Treasurer – Form 30-D ✕

● Committee Type
 ● **Detailed Information**
 ● Committee Information
 ● Treasurer Information
 ● Deputy Treasurer Information

PAC (Political Action Committee) Information

PAC is sponsored by: * ?

Labor Organization
 Corporation
 Not Sponsored

Name of Sponsor: Campaign Finance Acronym Used (if any):

Is this a Ballot Issue PAC? * ?

No
 Yes

Please list the issue: Campaign Finance

List any Affiliated PACs: ?

Back
Cancel
Next

- If your committee selects "Yes" as a Ballot Issue PAC, additional fields will appear to enter relevant data.
- Click on "Please List the Issue" to enter the description of the ballot issue. Appropriate examples would include "Franklin County Issue 1" or "Huber Heights School District Levy."

Designation of Treasurer – Form 30-D ✕

● Committee Type
 ● **Detailed Information**
 ● Committee Information
 ● Treasurer Information
 ● Deputy Treasurer Information

PAC (Political Action Committee) Information

PAC is sponsored by: * ?

Labor Organization
 Corporation
 Not Sponsored

Name of Sponsor: Campaign Finance Acronym Used (if any):

Is this a Ballot Issue PAC? * ?

No
 Yes

Please list the issue: Campaign Finance

List any Affiliated PACs ?

- List the name of any affiliated PACs by clicking on “List any Affiliated PACs.”
- For questions on PAC affiliation, see Chapter 6 of the Campaign Finance Handbook.

Designation of Treasurer – Form 30-D ✕

● Committee Type ● **Detailed Information** ● Committee Information ● Treasurer Information ● Deputy Treasurer Information

PAC (Political Action Committee) Information

PAC is sponsored by: * ?

Labor Organization **Corporation** Not Sponsored

Name of Sponsor: Campaign Finance Acronym Used (if any):

Is this a Ballot Issue PAC? * ?

No **Yes**

Please list the issue: Campaign Finance

List any Affiliated PACs: ?

- Complete all applicable fields for the committee.
- Click "Next" to proceed.

Designation of Treasurer – Form 30-D ✕

✔ Committee Type
 ✔ Detailed Information
 ● **Committee Information**
 ● Treasurer Information
 ● Deputy Treasurer Information

Committee Information

Full Name of Committee ?
 Campaign Finance Testing PAC

Street Address: 123 Testing City: Test State: Ohio Zip: 43215

A complete street address must be provided in each required address field. A post office box may be provided in addition to, but not in lieu of, the required street address (R.C. 3517.10(F)).

Telephone: 614-466-3111 Email: CFReports@ohiosos.gov Confirm Email: CFReports@ohiosos.gov

This email address will be used to transmit electronic filing information from the examining authority.

Back
Cancel
Next

- Complete all committee data fields with accurate information to ensure the committee receives notices timely and the Board has accurate contact information to assist the Board if a filing issue arises.
- All fields are required to be completed prior to submission.
- Click “Next” to proceed.

Designation of Treasurer – Form 30-D

✓ Committee Type
✓ Detailed Information
✓ Committee Information
● **Treasurer Information**
● Deputy Treasurer Information

Treasurer Information

First Name
TEST

Middle Name

Last Name
TEST

Suffix

Street Address
123 TESTING

City
TEST

State
Ohio

Zip
43215

A complete street address must be provided in each required address field. A post office box may be provided in addition to, but not in lieu of, the required street address (R.C. 3517.10(F)).

Telephone
614-466-3111

Email
cfreports@ohiosos.gov

Confirm Email
cfreports@ohiosos.gov

This email will be used for account access instructions and to transmit the user's electronic signature.

Back
Cancel
Next

- Complete all treasurer information fields with accurate information.
- The candidate or authorized party may designate themselves as the committee's treasurer.
- Ensure the email address provided is accurate as this will be utilized to create the treasurer's user account.
- Click "Next" to proceed.

Designation of Treasurer – Form 30-D

Committee Type Detailed Information Committee Information Treasurer Information Deputy Treasurer Information

Would you like to add a Deputy Treasurer?

Yes, add Deputy Treasurer No Deputy Treasurer

Be advised only a Treasurer or Deputy Treasurer may submit reports on behalf of a committee.
If you are the Candidate or Authorized Party and intend to file reports on the committee's behalf you will need to appoint yourself as the Treasurer or Deputy Treasurer to create reports, enter data, and submit reports.

Back Cancel

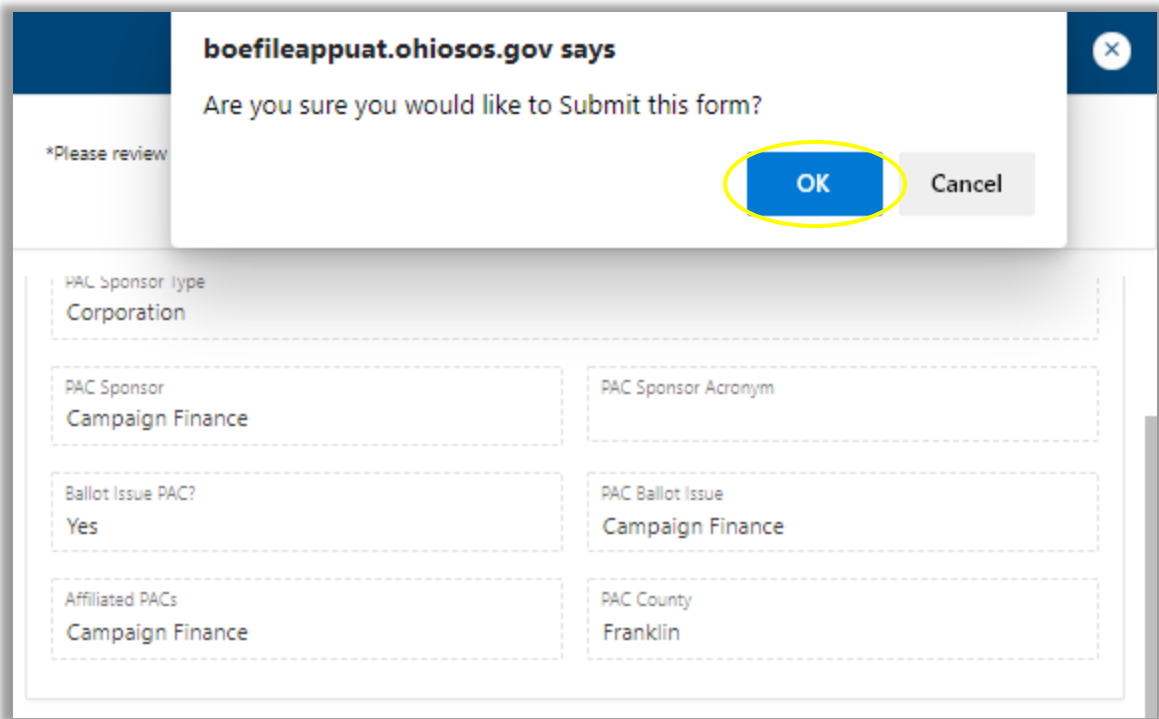
- If your committee has a deputy treasurer, select “Yes, add Deputy Treasurer.”
- If there is no deputy treasurer, select “No Deputy Treasurer.”
- A candidate or authorized party that is not either the treasurer or deputy treasurer will not be able to submit reports on behalf of a committee. Only a treasurer or deputy treasurer may submit reports.

- If “Yes, add Deputy Treasurer” is selected additional fields will appear to be completed.
- Complete all deputy treasurer information fields.
- Ensure the email address provided is accurate as this will be utilized to create the deputy treasurer’s user account.
- Click “Next” to proceed.

PAC Information		Edit PAC	
PAC Sponsor Type Corporation			
PAC Sponsor Campaign Finance		PAC Sponsor Acronym	
Ballot Issue PAC? Yes		PAC Ballot Issue Campaign Finance	
Affiliated PACs Campaign Finance		PAC County Franklin	

Committee Information				Edit Committee	Edit Treasurer	Edit Deputy Treasurer
Committee Name Campaign Finance Testing PAC			Committee Address 123 Testing			
Committee City Test			Committee State Ohio			
Committee Zip 43215		Committee Telephone 614-466-3111		Committee Email CFReports@ohiosos.gov		
Treasurer First Name TEST	Treasurer Middle Name		Treasurer Last Name TEST		Treasurer Suffix	
Treasurer Address 123 TESTING		Treasurer City TEST		Treasurer State Ohio		
Treasurer Zip 43215		Treasurer Telephone 614-466-3111		Treasurer Email cfreports@ohiosos.gov		
Deputy Treasurer First Name Test	Deputy Treasurer Middle Name		Deputy Treasurer Last Name Test		Deputy Treasurer Suffix	
Deputy Treasurer Address 123 Testing		Deputy Treasurer City Test		Deputy Treasurer State Ohio		
Deputy Treasurer Zip 43215		Deputy Treasurer Telephone 614-466-3111		Deputy Treasurer Email cfreports@ohiosos.gov		

- Review and confirm the information provided is accurate.
- If any changes are needed, click on "Edit PAC," "Edit Committee," "Edit Treasurer," or "Edit Deputy Treasurer," as applicable.
- Click "Submit" to proceed.



- An additional confirmation message will appear on the page.
- Click "OK" to verify the submission and move the DOT onwards.
- At this point the treasurer will be emailed a link to create their user account, provide the system generated PIN, and seek the treasurer's electronic signature to acknowledge appointment as treasurer.
- If a deputy treasurer is being appointed, they will also receive an email to create a user account and electronically sign to acknowledge their appointment.
- The DOT is not submitted to the Board for filing until all parties have electronically signed to authorize the submission or acknowledge their appointment.
- Once signed by the relevant parties the Board will review the provided information to confirm the submission is filed in the correct jurisdiction, or will redirect the submission to the appropriate county, or will reject the filing with an explanation why it is rejected.
- If the filing is rejected, necessary changes or corrections may be made by submitting an Updated DOT.
- Committees may begin entering report data and submit a campaign finance report prior to the Board's approval of the DOT, but the committee entered data will not appear on the public search site until the Board has approved the committee's account creation.