MapLight Campaign Finance System

Campaign Finance Filer Guide

Table of Contents

MapLight Campaign Finance System: Filer Guide

All filings are submitted through MapLight:
https://minneapolis.maplight.com/public

Welcome to MapLight, the portal for filing campaign finance reports and statements of economic interest for the City of Minneapolis. MapLight helps you conveniently and securely submit your filings and displays them for the public to view. This guide is for filing campaign finance reports, but if you need to file a statement of economic interest, please see the Statement of Economic Interest Filer Guide.

We hope this guide provides you with everything you need to file, but please reach out with any questions, difficulties, or ideas on how we can improve your experience.

You can reach us by email at **mpls.campaigns@minneapolismn.gov** or by phone at 612.331.8683.

Happy Filing!

Minneapolis Campaign Finance Team

How MapLight Works

MapLight makes filing easier by creating draft versions of your report, which you then can review and submit. You just need to submit your transactions and MapLight determines which are necessary to include in your report.

The steps for filing in MapLight are:

1. Create your user account (Only needs to be done once)
2. Create your Campaign (Only needs to be done once, unless you run for another office)
3. Enter all Contributions and Expenditures into your Campaign
4. Review the draft report created by MapLight, making sure it matches your records
5. Submit your Report

The rest of this guide covers these steps in greater detail.

Important Terms

Campaign Finance Report: An official record submitted by a campaign detailing their financial activity during a specific period. They are available to the public through MapLight after they are filed.

Filing Period: The dates which are covered by each campaign finance report. All transactions during these dates must be reported as well as the starting and ending balances of a campaign, in addition to other information.

Campaign: The organization formed to support a candidate running for office. In MapLight, a Campaign is how transactions are organized and reports are filed.

Candidate: A person who runs in the election for county, municipal, school district, or city office. Each campaign in MapLight must have one Candidate.

Contribution: Anything with a monetary value given or loaned to a campaign for a political purpose. Can be *Monetary* (cash) or *In-Kind* (anything that has monetary value but is not money: signs, t-shirts, etc.). Does not include a service provided without compensation by an individual.

Expenditure: Any item or service paid for by a Campaign.

Transaction: In MapLight, this means a Contribution or Expenditure.

Getting Started: Create User Accounts and Campaigns

You must have an account to work in MapLight. Your account must be connected to a Campaign, which organizes your filings. To get started, the first step is to create your user account. If you have already created a MapLight account and Campaign, you can skip to the *Add Transactions* section.

Create your User Account

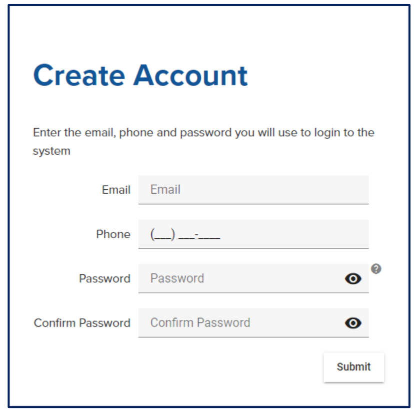

Figure 1 Account Creation Page

1. Open a web browser and go to **https://minneapolis.maplight.com/account/signup.**
2. Fill in the fields for *Email, Phone* and *Password* and click **Submit.**
   - ➢ *Passwords must contain an uppercase and lowercase letter, a number, and special character.*

Because working in MapLight is campaign activity, government emails and phones should not be used for your user account or campaign.

3. A verification email will be sent to the email you used. Enter the code from the email and press **Submit** to continue.
4. On the next page, enter your name and address. Press **Submit.**
   - ➢ *This address is the home or business where you would like to receive communications related to your filings.* *This address will be public information on your campaign finance filings if you are the Candidate.*
5. For the next step, you must either connect your account to an existing Campaign **(Option 1)** or create a new Campaign **(Option 2)**. If you are new to MapLight and have not yet created your campaign, go to **Option 2.**

Option 1: Connect to an Existing Campaign

1. Click **Select your Campaign**
2. Enter the name your Campaign in the search box.
   a. Select the correct Campaign from the list and click **Submit**.
3. The Candidate or Treasurer from that Campaign will be notified for your request.
   - ➢ *To work in MapLight, your account must be connected to a Campaign. You can either create a new Campaign or connect to an existing Campaign by requesting access.*

Option 2: Create a New Campaign

1. Click **Create a New Campaign**
2. Fill in the fields in the *Campaign Information* section using the dropdown menus.
3. The next step depends on whether or not you the Candidate for the Campaign:

- If you <u>are</u> the Candidate for this Campaign, select **I am the Candidate for this Campaign**. This will automatically fill the *Candidate Contact Information* section with your contact information.
- If you <u>are not</u> the Candidate, select **I am the Treasurer for this Campaign** and enter the Candidate information in the *Candidate Information* sections.
    - *This is the home or business information where they would prefer to receive communications from us. It will be made public on campaign reports.*
    - *You and the Candidate will both receive messages and be able to file reports for the Campaign.*

4. Click **Next.**
5. In the *Business Information* section, enter the contact information that will appear on the Candidate's Statements of Economic Interest.
    a. Enter the occupation and employer for the Candidate.
        - *This information will be made public.*
6. Click **Next.**
7. Enter a personal phone number and email address where we will be able to reach the Candidate after the Campaign ends or the Candidate leaves office.
    - *Personal Contact Information will only be used if we cannot reach you by your other contact information. It will not be made public.*
8. Click **Next.**

It is very important that we are able to reach candidates to provide reminders and support for required reports. Some reporting requirements occur a year or more after the election is over and whether or not the candidate currently holds office.

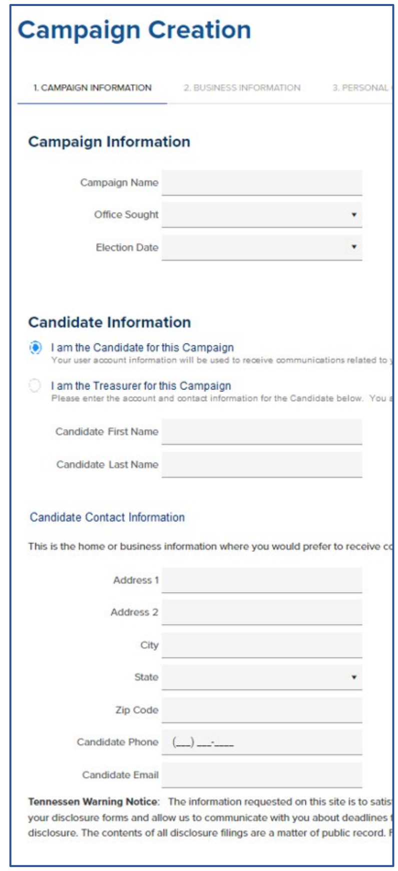

Figure 2 Campaign Account Creation Page

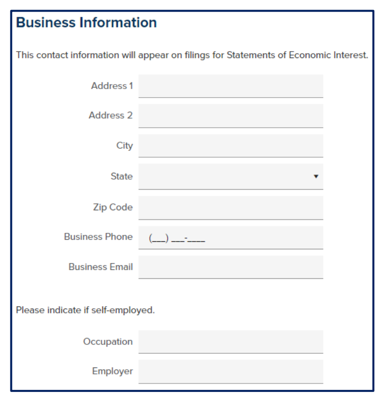

Figure 3 Business Information Page

Tennessen Warning Notice*: The information requested on this site is to satisfy the requirements of the disclosure forms provided by the Campaign Finance Board, and to assist in the efficient administration of the site. The information provided will be used to help complete your disclosure forms and allow us to communicate with you about deadlines for required forms and any questions this office may have in the process of collecting these filings. Unless otherwise indicated, this information is required to satisfy the legal requirements for disclosure. The contents of all disclosure filings are a matter of public record. Failure to provide required information may result in penalties under MN Statutes 10A.09 or 211A.05.*

The next step (Adding Officers to your Campaign) is optional. To skip it and complete your campaign creation, press **Submit** at the bottom of the page.

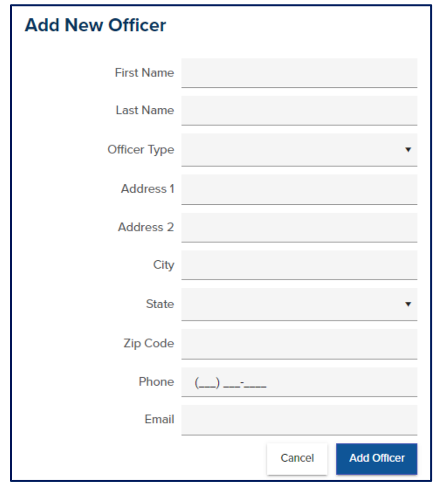

Figure 4 Add Officer Page

9. Optional Step: Adding Officers. Officers are users invited to work on the Campaign in MapLight.

    a. To add an officer, enter their information in the *Add New Officer* section and click **Add Officer.**

    ➢ *MapLight has three types of officers:*

    Candidate: The person running for office. Each Campaign must have exactly one Candidate. Manages all aspects of their Campaign in MapLight.

    Treasurer: Able to fully access and manage all parts of a Campaign in MapLight, including adding and removing other officers.

    Officer: Able to add transactions, but not manage other users or file reports. This is the default if no other officer type is chosen.

    b. Once you add an officer, they'll receive an email invitation to join your Campaign on MapLight. They will be asked to create an account if they do not already have one.

10. Once you have finished adding officers, click **Submit**.

    ➢ *Officers can be also added and edited later, through the Campaign Information page.*

Add Transactions

The next step to file a report is to enter each time your Campaign has taken in and spent money, which in MapLight are called "Transactions". Money you take in is a "Contribution" and money you spend is an "Expenditure". Your transactions are saved as you add them, so you can wait to submit the report until you are ready.

To enter a Transaction, click **Campaign Dashboard** on the navigation bar and then click **Filings** on the left-hand menu.

From the Filings page, click **Add Transaction**. Select the appropriate Transaction Type.

- *Contribution:* A monetary or in-kind contribution to a Campaign.
- *Expenditure:* An expense incurred and paid by a Campaign.

Transactions can be entered individually or in bulk using an excel or csv file. See the bulk upload instructions on pg. 8.

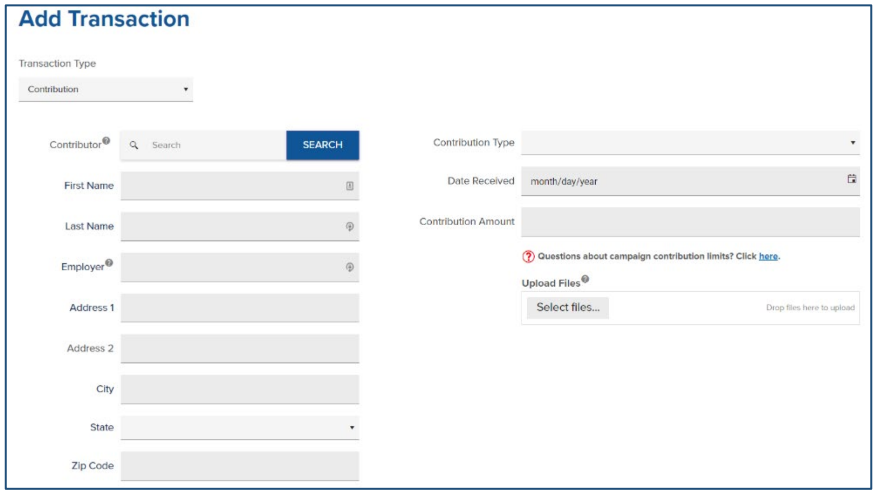

Figure 5 Add Transaction Form for Contributions

Add a Contribution

1. Select **Contribution** from the *Transaction Type* dropdown menu.
2. In the left-hand column, enter the Contributor's contract information.
   - For an existing Contributor (who has previously given to this Campaign), enter the person's name in the *Search* field and select them from the list.
   - For a new Contributor, enter their contact information.
   - *Once a Transaction has been entered for a new Contributor, they will appear in the search field as an option for future Contributions to save time.*
3. In the right-hand column, enter details for the Contribution.
   - *To read more information about Contribution limits, see the [Campaign Finance Report Page]*
4. Click **Save** to add the Contribution.

All Contributions should be reported in MapLight regardless of dollar amount, even though only those that are over $100 will be itemized on your report.

Add an Expenditure

Select **Expenditure** from the Transaction Type Dropdown menu. Enter details about the Expenditure. Click **Save** to add the Expenditure.

- *Date Paid refers to the date the Campaign paid for the Expenditure.*
- *For Purpose, enter a short description of the goods or services purchased.*

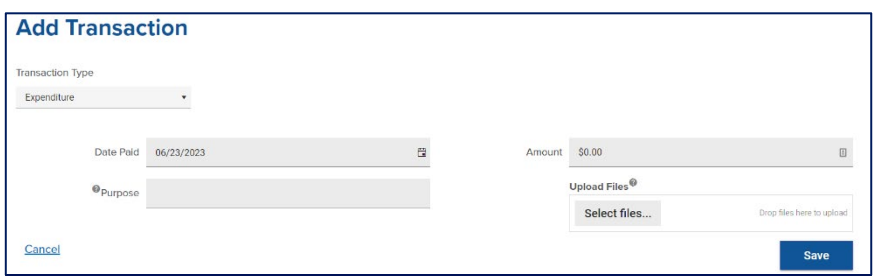

Figure 6 Add Transaction Form for Expenditures

Legal Disclaimer: *This document has general information about campaign finance reports. It is not legal advice nor a comprehensive list of campaign finance laws. We recommend that candidates seek legal counsel to ensure compliance. Election law is the final authority in all matters*

Bulk Upload of Transactions

You can also upload multiple Contributions or Expenditures at once using the *Upload Data* tool.

1. Select **Filings** from the left-hand menu and click the **Upload Data** button on the upper right of the page.
2. On the *Upload Data* page, click **Download a Template** for either Contributions or Expenditures.
3. Upload an Excel or CSV file in the template format to add transactions to the system.
   - *Check the tabs in the template for more formatting information.*
   - *If there are problems with the uploaded file an error shown by the system and none of the transactions are uploaded.*
   - *After transactions are uploaded, they will appear and can be edited like manually added transactions.*

> **Your report is not submitted after you have added your transactions. You must still review and submit the draft report.**

Search and Edit Transactions

You can search and edit Transactions (Contributions or Expenditures) that you have entered.

Click **Campaign Dashboard**, and then click **Filings** from the left-hand menu. Click **Search Transactions**.

On the **Search Transactions** page, enter a name or part of a name and click **Search** to find transactions from that contributor. You can sort the results by clicking on the column headers and you can also filter the results:

- *Transaction Type* – Contribution or Expenditure
- *Transaction Date* – enter a start and end date
- *Transaction Amount* – enter a minimum and maximum amount

The search results display a brief summary of information about each transaction. **Click the plus sign** next to the transaction to expand and see more details.

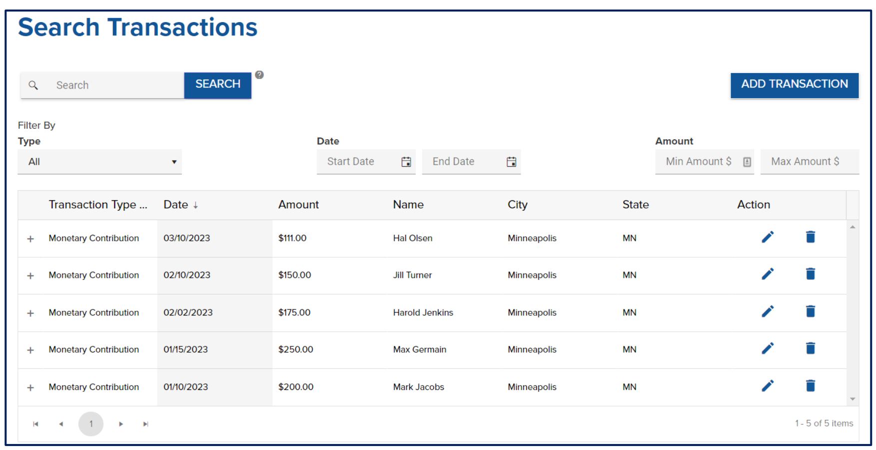

Figure 7 Search Transactions

Click the **Pencil Icon ( )** to edit the transaction or the **Trash Can Icon ( )** to delete the transaction.

If you need to enter a new transaction, click **Add Transaction**.

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Submit Campaign Finance Reports

Once you have entered your transactions, the final step is to submit your campaign finance report. MapLight creates a draft of your report, but you must still review and submit it to fulfill your reporting requirement.

Click **Campaign Dashboard** and then **Filings** from the left-hand menu. Click **Campaign Finance Report**.

Campaign Finance Report Page

Review the draft columns of your report.

- *Filing Information* contains information about the Campaign and the specific report.
- *Summary* displays the totals for the currently selected filing period.

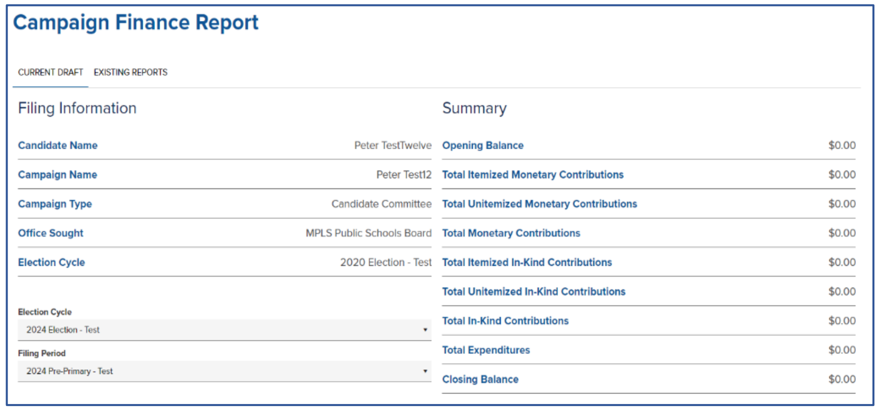

Figure 8 Campaign Finance Submission Page (Upper)

Below these sections, you can see transactions, grouped by transaction type. Only transaction types present in the report are displayed.

Click the headings to show the related transactions, and the unitemized total, if applicable. Click the transaction to see more details.

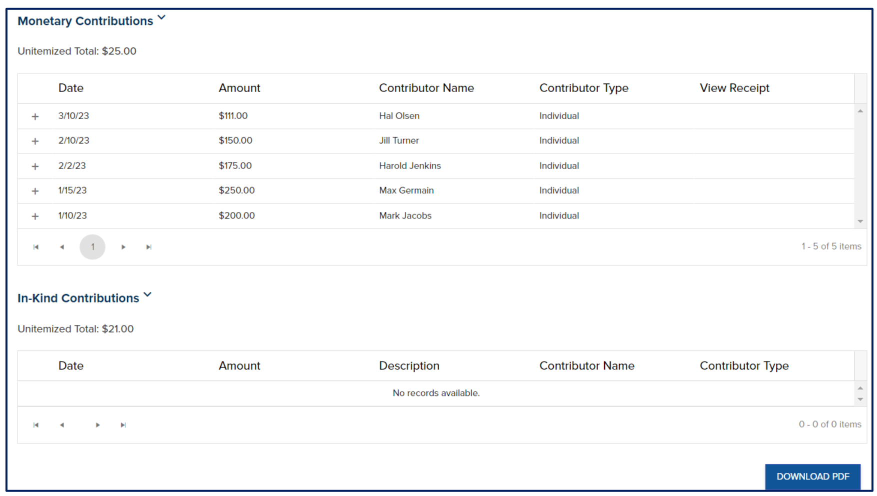

Figure 9 Campaign Finance Submission Page (lower)

Filing a Report

On the *Current Draft* tab, you can review and submit your campaign finance report.

1. Select the appropriate *Election Cycle* and *Filing Period* to view the related draft. Carefully review the transactions. If needed, you can click the pencil icon to edit a transaction.
   - *For more information on Filing Periods see https://vote.minneapolismn.gov/candidates/campaign-finance*
   - *See the below sections if you are filing an Initial or Final report.*
2. Digitally sign the report by checking the attestation box and typing your first and last name.
   - *You can use the **Download PDF** button to download a PDF copy of your report for your records*
3. Click **Submit** to file the report.

It is your responsibility to review your draft report and confirm it is accurate before submitting. Use the *Summary* and *Transaction* sections to check the report against your own records. See the FAQ section for tips on how to identify and correct errors.

Types of Campaign Finance Reports

Different reports are required at several times during the year, and some are required even if you were not on the ballot. In MapLight, these different reports are selected using the *Filing Period* dropdown menu. While these reports have different date ranges, they each contain the same types of information. For more details on these report dates, click **MPLS Campaign Finance Information** on the navigation bar.

Initial Report

The first time you raise or spend more than $750, you must file an Initial Report within 14 days. This report covers all your Transactions through the date the Initial Report is filed. This will probably be the first report you file.

The Initial Report only needs to be filed once and if your campaign has already filed one in another system, it does not need to do so again.

To file an Initial Report, select the correct *Election Cycle* and then select **Initial** from the *Filing Period* dropdown.

Select the appropriate *Start Date* and *End Date* for the report.

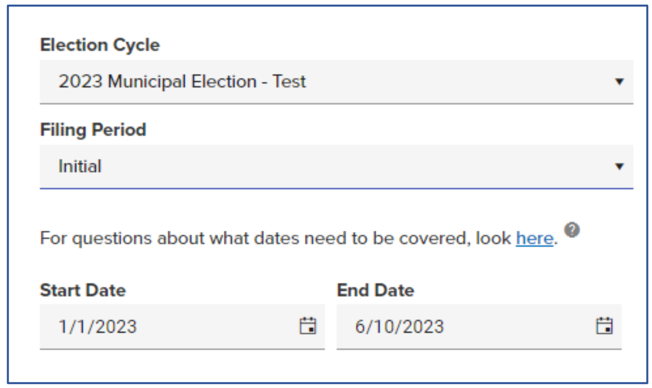

Figure 10 Initial Report

- *The Start Date should be the date of your first transaction and the End Date should be the day you are submitting the Initial Report.*

When you file you Initial Report, you are "opening" your campaign finance account. Once open, you are required to file an Annual Report each year, with additional reports required for years you are running in an election. Your account is open until you close it by filing a Final Report.

Pre-Primary, Pre-General and Post-General Reports

Each election year when you are on the ballot, you are required to submit reports throughout the year, based on the dates of the Primary and General Election. These have pre-determined dates and are submitted by selecting the current *Election Cycle* and *Filing Period.* MapLight will include transactions from the report dates automatically.

Annual Report

Each year after you have filed an Initial Report, you must file an Annual Report, even if you were not on the ballot and regardless of how active your campaign was. If you were not on the ballot, this report covers the entire year. If you were on the ballot, it covers the dates after the Post-General Report. You can end this requirement by filing a Final Report.

Certification of Filing

While not technically a report, all candidates on the ballot must submit a Certificate of Filing within 14 days after the General Election date, regardless of how much money they have spent or raised. This is submitted through MapLight and attests that you have filed all required reports.

Statement of No Activity

If you Campaign has had no transactions for a filing period, you should file a *Statement of No Activity.*

- *There may still be values in the beginning and ending balances in the Summary.*

Check the box to confirm there was no activity during the filing period, digitally sign the report, and click **File Statement of No Activity**.

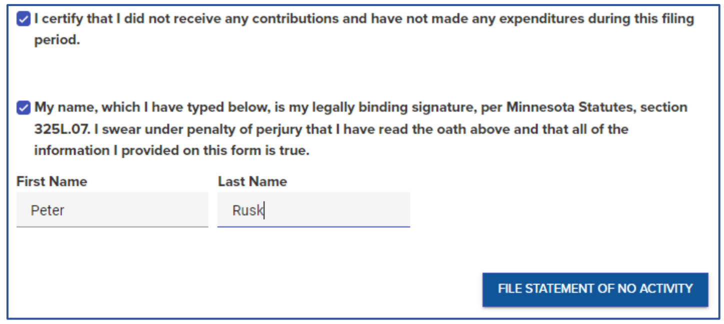

Figure 11 Filing a Statement of No Activity

Final Report

If you will no longer use your Campaign for future elections, you can close the Campaign account. After your Campaign account is closed, you are no longer required to file Annual Campaign Finance Reports.

To file a Final Report, your campaign must:

- Have no outstanding debts.
- Have $100 or less in assets.

To file a report as your Final Report, check the box that begins **"This is my FINAL REPORT".**

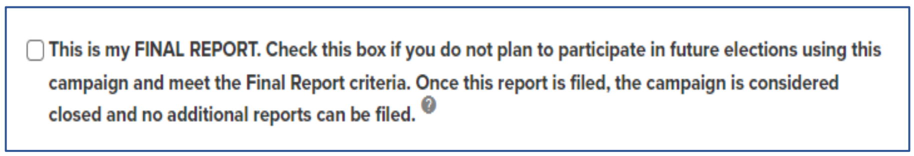

Figure 12 Final Report Submission Box

- *This box will become available when your Campaign has $100 or less in assets.*
- *There is no separate report called "Final Report", you designate the latest report you are filing as a Final.*

File an Amendment to a Report

Amendments can be filed to previous reports to correct errors or update them with new information. The older versions of the report are still available to the public.

1. Click **Campaign Finance Report** from the Filings page. On the *Current Draft* tab, select the *Election Cycle* and *Filing Period* for the report you would like to amend.
   - *You can edit transactions or report additional transactions for past filing periods and resubmit the amended version.*
2. Once you have made any updates or corrections, **check the relevant boxes** and click **Submit**.
   - *The submit button is deactivated if there have not been any changes to the previous version of the report.*

If you amend the transactions for a report that has already been filed, you must resubmit that report. This system will not automatically update the report.

View Previously Submitted Reports

To view previous Campaign finance reports, click **Campaign Finance Report** from the Filings page. Then click the **Existing Reports tab,** next to *Current Draft.*

Filing Period	Reporting Period	Amendment Version	Date Submitted	View
December Monthly	11/30/2021 - 12/30/2021	Orignal	02/17/2022 18:54:47	View
November Monthly	10/31/2021 - 11/29/2021	Orignal	02/17/2022 18:50:13	View

1 Page 1 of 1 (2 items total)

Figure 13 View Submitted Reports

The *Existing Reports* tab displays a list of Campaign finance reports that have already been submitted. Select a Report Year to filter the results to a particular year. Click **View** to view the submitted version of the report.

- *Filing Period* – The name of the filing period for which the report was filed.
- *Reporting Period* – The date range of the filing period for which the report was filed.
- *Amendment Version* - If report has been amended, the version number of the most recent filing. The row can be expanded to see previous versions of the report by clicking the arrow next to the *Date Submitted* field. “Original” means there is only one version of the report.

Manage Campaigns and Users

Each Campaign has Primary Users (Candidate and Treasurer), and officers, who have limited access to the Campaign.

Amend Campaign Information

Primary Users (Candidate or Treasurer) of a Campaign can amend the Campaign Information on the **Campaign Information** page. Below the campaign information summary, click **Campaign Information**. At the bottom of the page, click **Edit**. Make any changes needed and click **Submit**.

Figure 14 Manage

Search Contacts

You can search for any contributor to your Campaign that you have entered into MapLight.

From the Filings page, click **Search Contacts**.

On the **Search Contacts** page, enter a name or part of a name and click **Search**. You can also filter the results by:

- Role
- State
- City

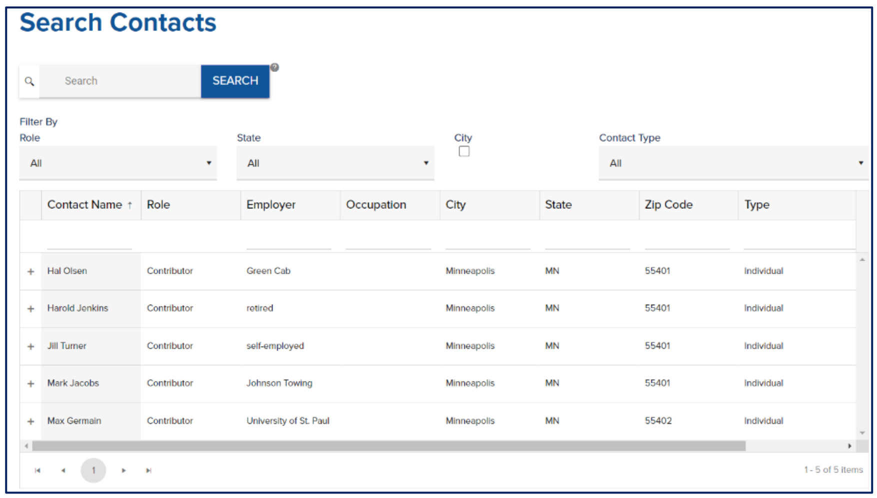

Figure 15 Search Contacts

Manage Users

Primary Users can view, change, and add users to the Campaign.

Select your Campaign and click **Campaign Information** from the left-hand menu.
Below the Campaign details, click **Manage Users**.

Make Another User Treasurer

If you are the Treasurer or Candidate, you can assign the role of Treasurer to another user. To make another user the Treasurer, click **Make Treasurer** in the *Action* column.

- *The system sends an email to the selected user, giving them the option to accept or deny the role of Treasurer before the invitation expires. If they accept, they become the Treasurer and the former Treasurer will become a regular officer of the Campaign.*

Remove a User

To delete a user from a Campaign, click the **Trash Can Icon ( )** on the user's line. The user will be removed from the Campaign and will no longer be able to view or interact with campaign information in MapLight.

Add a User

To invite another person to join the Campaign, scroll to *Add User* on the Manage Users page, enter their email address, and click **Send**.

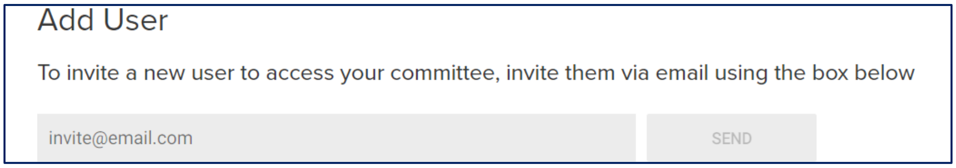

Figure 16 Add User Page

- ➢ *The invited user will receive an email inviting them to join the Campaign. These invitations expire in 48 hours.*

Approve or Deny Affiliation Requests

The Affiliation Request list shows users who have requested access to the campaign.

- ➢ *If you approve the request, the user will be added to the campaign. If you deny the request, the user will be moved to the rejected users list and will not have access.*

Rejected Requests

This table shows users who have previously requested access to the campaign but have been rejected. Rejected users can be reinvited using the same process.

Manage Multiple Campaigns

You can work on multiple campaigns with your user account. You will have to either join or create additional campaigns to gain access.

Join an Existing Campaign or Register a New Campaign

Click on your username on the navigation bar and select **Switch Campaign** from the dropdown. From this page:

- Click **Join Campaign** to search for and request access to an existing Campaign.
- Click **New Campaign** to create a new Campaign.

Figure 17 Switch Campaign Page

Switch Campaigns

Select the Campaign you would like to switch to from the list and click **Select Campaign.**

Calendar

The calendar displays election-related dates, events, and activities, such as filing deadlines. When logged in, you can see important dates for your Campaign.

View Calendar

To view your calendar, click **Campaign Dashboard** and click **Calendar** on the left-hand menu.

Download My Calendar

To download your filing calendar into your own calendar app, click Download Calendar in the upper right. You can import the .ics file to your own calendar app.

Messages and Notifications

You have an inbox to receive messages and notifications. City staff may send automatic notifications to you, such as filing deadline reminders. You can also send messages directly to administrators.

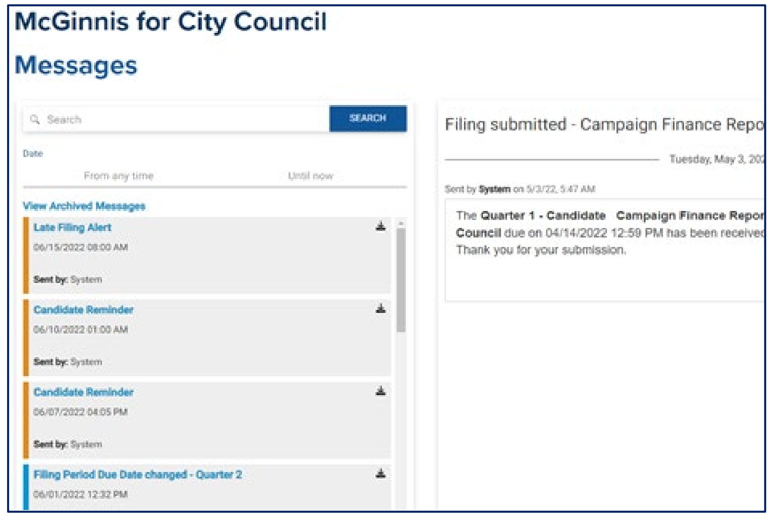

Figure 18 Messages Page

View Messages

To view your messages, select your campaign through the *Switch Campaign* menu and click **Notifications** on the left-hand menu.

- ➢ *Any messages or notifications you've received appear in your active message list with the most recent message at the top.*

Click a message to view it. **Click on the message in the message list a second** time to un-select the message.

- ➢ *The active message appears on the right side.*
  Any message responses will appear after the message, with the most recent at the bottom of the thread.

Create a New Message

To send a new message to city staff, click **New Message**.

- ➢ *You cannot create a new message while an existing message is selected.*

Enter the subject of the message, and then write your message. To attach a file, click the **attach icon (📎)** and choose your file to attach. Click **Send** to send.

Reply to a Message

To reply to a message, **click a message** to view it. Click **Add Reply**, on the upper right. Compose and send the message as normal.

Archive a Message

To archive a message and remove it from your active message list, click the **Archive Icon (⤓)** in the top right corner of the message in the list. You can access archived messages by clicking **View Archived Messages**.

Search Messages

To search for a message by text in the subject or body of the message, enter a word or phrase in the search box. Click **Search**. To narrow the search, select a start date and/or end date.

Help & FAQ

Click **Help for Filers** on the navigation bar to find additional information on MapLight and campaign finance.

Choose from several options for help:

- FAQs—Frequently asked questions about MapLight and campaign finance in Minneapolis
- Laws and Rules—Links to official laws for campaign finance reporting.
- User Manual—Links to PDF documents that describe all pages and functionality of the app for filers.
- Contact Us—How to get in touch with us with your questions.

Please reach out to the Campaign Finance Team with any questions you have. You can reach us by email at **mpls.campaigns@minneapolismn.gov** or by phone at 612.331.8683.

Frequently Asked Questions

I did not run in the election this year. Do I need to file any reports?

It depends. If you have not closed your campaign finance account by filing a Final Report, then you are still required to file an Annual Report each year, which covers the whole year and is due on January 31 of the next year (For example, the 2024 annual report covers 1/1/2024-12/31/2024 and is due on 1/31/2025). This report is required regardless of whether you were on the ballot that year or how active your campaign is.

If you have filed a Final Report, you do not need to file any further reports. Check in with the Minneapolis Campaign Finance Team if you are unsure and they can confirm if you need to file.

What reports do I have to file?

Once your Campaign has raised or spent more than $750, you must file an Initial Report. After that, if you are on the ballot that year, you must file a Pre-Primary, Pre-General, Post-General and Annual Report. All candidates on the ballot must file a Certification of Filing, which states that you have filed all required reports.

If you are not on the ballot, you must still file an Annual Report, unless you have filed a Final Report.

For more details on these reports: https://vote.minneapolismn.gov/candidates/campaign-finance/

When can I stop filing reports?

You can close your Campaign account by filing a Final Report in MapLight. Your campaign must have $100 or less and have not outstanding debts. Check the Final Report section of this document for more information.

My report summary does not match my records. What do I do?

First, you should first check that correct filing period is selected on the Campaign Finance Report page. If the incorrect filing period is selected, it may not cover the expected transactions and give a summary that does not look correct.

If that does not work, you should double check that the information is correct on the Transaction. See the *Search and Edit Transactions* section for more information on viewing your transactions.

If the report summary is still not appearing as expected, reach out to the Campaign Finance Team for assistance.

Why are we filing with Minneapolis, I used to file with Hennepin County?

A: In 2022, the State Legislature updated rules for local election campaign finance reporting so that all campaigns reporting for city offices must now file with Minneapolis Elections and Voter Services.

What if I want to run for a different office?

A: You will need to create a new campaign in MapLight for that candidacy. You will need to separately keep track of Contributions and Expenditures for each of these campaigns. If you would like to close your older campaign, you can file a Final Report. See the Final Report section for more information.

What if I don't know if I should report something or if I am unsure about a rule?

We can offer general information on campaign finance law and technical support for MapLight. However, we cannot offer legal advice or answer specific questions regarding your campaign's compliance with the law. We recommend you seek legal counsel to answer those questions. You should also feel free to ask us any question, just know that we may not be able to assist.

What if I suspect a campaign of not complying with the law?

A: All complaints alleging violations of the Fair Campaign Practices and Finance Acts are heard by the Minnesota Office of Administrative Hearings (https://www.revisor.mn.gov/statutes/cite/211A). You can read more about the process of filing a complaint here: https://mn.gov/oah/self-help/administrative-law-overview/fair-campaign.jsp