Campaign Finance System

Filer Guide

Last Revised: Jul 21, 2025

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Filer Users - ‘How-to…’ Articles

User Accounts and Filer Access

Create a User Account

Background

New filers must create an account before they can access the system, select or establish their campaign, and submit filings.

Steps

1. In your browser, navigate to the system’s public landing page.
2. Click “Log In” in the site header.
3. Select “Create Account”
4. On the registration form, enter:
    a. Email Address
    b. Phone
    c. Password (and confirm)
5. Check your email for a “Confirm Your Account” message.
6. In that email, click “Confirm Account” to confirm your address and activate your account.
7. After confirmation, you will be prompted to enter your “Account Information” and “User Account Contact Information”.
8. On the next screen, choose either “Select Your Committee Entity” to join an existing committee or “Register a New Committee” to create one
9. On the Select Committee or Independent Expenditure Committee (IEC) page, choose one of:
    a. “New Committee” to register a new committee
    b. “Join Committee” to request access to an existing committee
    c. “New IEC” to register a new independent expenditure committee
    d. “Join IEC” to request access to an existing IEC
10. Follow the on-screen prompts to complete your committee or IEC registration or access request.

Result

An active filer account is created and associated with the committee or IEC you selected. You will land on that entity’s dashboard once your request is approved or completed.

Create a Committee or IEC

Background

Users who represent a new committee or Independent Expenditure Committee (IEC) must create it in the system before filing or accessing reports.

Steps

1. After registering your account or clicking your name and selecting "Switch Committee" in the page header, the system directs you to the Select Committee or Independent Expenditure Committee (IEC) screen.
2. Click "New Committee" (or "New IEC" for an IEC).
3. Complete the registration form pages and fields:
    a. Committee Information
    b. Business Information
    c. (Optional) Add Officers
    d. (Optional) Bank Information
4. Click "Submit".
5. Confirm that the new entity appears in the "Switch Committee" menu under your profile name.

Result

The system creates the new committee or IEC and links you as an officer.

See Also

Create a User Account

Join an Existing Committee or IEC

Background

Users who are added to an existing committee or IEC must request access before they can view or file on its behalf.

Steps

1. After registering your account or clicking your name and selecting "Switch Committee" in the page header, the system directs you to the Select Committee or Independent Expenditure Committee (IEC) screen.
2. On that page, click "Join Committee" (or "Join IEC").
3. In the search box, begin typing the committee or IEC name.
4. In the results table, locate the correct row and click "Send".
5. (Optional) Add a note to the filer's representative.

Result

An access request is created and sent to the existing committee/IEC representative. Once approved, the entity appears in your Switch Committee menu.

See Also

Create a User Account

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Switch Committees

Background

Users affiliated with multiple committees or IECs can switch between them at any time to access the correct dashboard and filings.

Steps

1. Click your name in the header at the top right.
2. From the dropdown, select “Switch Committee”.
3. On the Select Committee or Independent Expenditure Committee (IEC) page, review the list of committees and IECs you belong to.
4. Select the name of the committee or IEC you want to load.
5. Click “Select Filer”.

Result

The system loads the chosen committee’s dashboard and filings.

See Also

Join an Existing Committee or IEC

Create a Committee or IEC

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Managing Committees

Amend Committee Registration

Background

Committee details can be amended to remain current for accurate public records and filings.

Steps

1. Click "Committee Information" in the left-hand menu.
2. On the Committee Information page, scroll down and click "Committee Information".
3. Scroll down to click "Amend Registration".
4. Update any fields as needed.
5. Click "Submit" at the last page of the form.

Steps for Independent Expenditure Committee (IEC)

1. Click "Registration" in the left-hand menu.
2. On the "Independent Expenditure Filer Information" page, scroll down and click "Amend Registration".
3. Update any fields as needed.
4. Click "Submit" at the last page of the form.

Result

The committee registration is updated, and the revised details appear on the Committee Information page.

See Also

Switch Committees

Manage Committee Users

Background

Committee agents can add, remove, or update users who have access to file and view committee records.

Steps

1. Click "Committee Information" in the left-hand menu.
2. On the Committee Information page, scroll down and click "Manage Users".
3. The Current Users table lists all active committee users:
    a. Role (e.g., Candidate, Registered Agent)
    b. First Name, Last Name, User Name (Email)
4. Actions (pencil icon to change role; trash-can icon to remove)
5. To invite a new user:
    a. In the Add User section below the table, enter the user's email in the invite box.
    b. Click "Send". An invitation email is sent; once accepted, the user appears in the Current Users list.
6. To approve or deny affiliation requests:
    a. Scroll to Affiliation Requests.
    b. For each row, click the check-mark icon to approve and grant an Officer role, or click the "x" icon to deny.
    c. Approved users move into the Current Users table; denied requests move to Rejected Requests.

Result

The Manage Users page refreshes to reflect added users, role changes, and affiliation approvals or denials.

See Also

Select a Registered Agent for the Committee

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Designate a Registered Agent for the Committee

Background

One user may serve as the registered agent for the committee.

Steps

1. Click "Committee Information" in the left-hand menu.
2. On the Committee Information page, scroll down and click "Manage Users".
3. The Current Users table lists all active committee users. From that table, find the user you wish to designate.
4. Click "Make Registered Agent".
5. Click "Confirm".

Result

The selected user receives an email titled "Primary User Change". They must click the link in that email to finalize their role as registered agent; they may click "Accept" to be added or "Reject" to decline.

See Also

Manage Committee Users

Terminate a Committee

Background

To officially close a committee, the registered agent must file a final zero-balance Campaign Finance Report. Once submitted, the committee's registration status is set to Terminated.

Steps

1. Click "Filings" in the left-hand menu, then select "Campaign Finance Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period".
3. Ensure all transactions result in a Closing Balance of $0.00:
4. Add expenses or refunds if needed to zero out the balance.
5. Scroll to the bottom of the draft report:
    a. Check "This is my FINAL REPORT…".
    b. Check the attestation box to digitally sign.
    c. Enter your First Name and Last Name.
    d. Draw your signature in the signature pane.
6. Click "Submit" to file the final report.

Steps for Independent Expenditure Committee (IEC)

1. Click "Registration" in the left-hand menu.
2. On the "Independent Expenditure Filer Information" page, scroll down and click "Terminate Registration".
3. Click "Yes" to confirm termination.

Result

The committee registration is updated to Terminated, and the revised status appears on the "Switch Committee" page. The Terminated committee is limited to amending already submitted reports.

See Also

[File a Campaign Finance Report]

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Managing Transactions

Record a Contribution

Background

Contributions must be logged so they are included in campaign finance filings and in compliance with reporting thresholds.

Steps

1. Click “Filings” in the left-hand menu, then click “Add Transaction”.
2. In the Transaction Type dropdown, choose “Contribution.”
3. In the Contributor Type dropdown, select “Individual”, “Committee”, or “Organization.
4. In the Contributor field, begin typing a name:
    a. If matching records appear, select the correct contributor to prefill their details.
    b. If no results appear, proceed to fill in all contributor fields manually.
5. Complete the form fields.
6. (Optional) Attach files under “Upload Files”.
7. Click “Save”.

Result

The contribution is added to your transaction history, the cycle total updates, and the entry will appear in the corresponding campaign finance report.

See Also

Record an Expenditure

Record a Loan

Record an Expenditure

Background

Expenditures must be logged so they are included in campaign finance filings and in compliance with reporting thresholds.

Steps

1. Click "Filings" in the left-hand menu, then click "Add Transaction".
2. In the Transaction Type dropdown, choose "Expenditure."
3. In the Payee Type dropdown, select "Individual", "Committee", or "Organization.
4. In the Payee field, begin typing a name:
    a. If matching records appear, select the correct payee to prefill their details.
    b. If no results appear, proceed to fill in all payee fields manually.
5. Complete the form fields.
6. (Optional) To record a payment against this loan:
    a. In Sub-Transaction Type, select the type of payment.
    b. Enter the Date and Amount of the payment.
    c. Click "Add."
    d. Repeat for each payment.
7. Click "Save".

Result

The loan is added to your transaction history, and the entry will appear in the corresponding campaign finance report.

See Also

[Record a Contribution]

[Record a Loan]

Record a Loan

Background

Loans must be logged to track committee debt and repayment activity; each loan and its payments are included in campaign finance filings.

Steps

1. Click "Filings" in the left-hand menu, then click "Add Transaction".
2. In the Transaction Type dropdown, choose "Loan."
3. In the Lender Type dropdown, select "Individual", "Committee", or "Organization.
4. In the Lender field, begin typing a name:
    a. If matching records appear, select the correct lender to prefill their details.
    b. If no results appear, proceed to fill in all lender fields manually.
5. Complete the form fields.
6. (Optional) Attach files under "Upload Files".
7. Click "Save".

Result

The loan is added to your transaction history, and the entry will appear in the corresponding campaign finance report.

See Also

Record a Contribution

Record an Expenditure

Search Transactions

Background

Locate specific contributions, expenditures, or loans that were already entered in the system in order to view or make changes.

Steps

1. Click “Filings” in the left-hand menu, then select “Search Transactions.”
2. (Optional) In the search box, enter a keyword (name, memo text). Click “Search.”
3. (Optional) Use the Type dropdown to filter by Contribution, Expenditure, Loan, or All.
4. (Optional) Enter a Start Date and End Date.
5. (Optional) Enter Min Amount and Max Amount.
6. Review the filtered results in the table below.
7. Click the “+” to expand a row or the pencil icon to edit a transaction.

Result

The transactions list shows only those records matching your criteria, ready for review or editing.

See Also

Edit a Transaction

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Edit a Transaction

Background

Transactions can be updated to correct errors or add missing details.

Steps

1. Click "Filings" in the left-hand menu, then select "Search Transactions."
2. Locate the transaction you wish to edit in the results table.
3. Click the pencil icon in that transaction's Action column.
4. On the Add Transaction page, verify that the form fields are prefilled with the existing transaction data.
5. Make any necessary changes (e.g., Date, Amount, Payee/Contributor details, Purpose, Notes).
6. (Optional) Update or add file attachments under "Upload Files."
7. Click "Save."

Result

The transaction is updated with your changes and the revised record appears in the Search Transactions page.

Note: If you edit a transaction that was already included in a submitted Campaign Finance Report, you must file an amendment and resubmit that report for the changes to appear.

See Also

Search Transactions

Amend a Campaign Finance Report

Search and Edit Contacts

Background

Maintaining accurate contact records ensures contributors and payees are correctly identified in transaction filings.

Steps

1. Click “Filings” in the left-hand menu, then select “Search Contacts.”
2. In the search box above the table, enter a full or partial name, then click “Search.”
3. Locate the desired contact in the results and click the pencil icon in its Action column.
4. The row expands to allow update of any fields (Name, Address, Employer, etc.).
5. Click “Save.”

Result

The contact record is updated immediately and will prefill for future transactions.

See Also

File a Campaign Finance Report

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Manage Filings

File a Campaign Finance Report

Background

Campaign Finance Reports must be reviewed, digitally signed, and submitted to comply with filing requirements.

Steps

1. Click "Filings" in the left-hand menu, then select "Campaign Finance Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period".
3. Review the Filing Information section, which shows your committee's details and report data.
4. Review the Summary section, which displays opening balance, closing balance, and totals for each transaction type.
5. For each transaction type listed below the summary:
    a. Click the transaction type heading to expand its related transactions and any unitemized total.
    b. Click the plus sign beside a transaction to view detailed fields.
    c. (Optional) Click the pencil icon to edit a transaction.
    d. (Optional) Click the trash can icon to delete a transaction.
6. Scroll to the bottom of the report:
    a. Check the attestation box.
    b. In the signature pane, draw your signature.
    c. Enter your first and last name.
7. Click "Submit" to file the report.

Result

The draft campaign finance report is submitted, and you receive confirmation. Submitted reports appear under the "Existing Reports" tab.

See Also

[Amend a Campaign Finance Report]

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Amend a Campaign Finance Report

Background

Campaign Finance Reports must be reviewed, digitally signed, and submitted to comply with filing requirements.

Steps

1. Click "Filings" in the left-hand menu, then select "Campaign Finance Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period" for the report that needs to be amended.
3. Make any necessary edits or additions to transactions in the expanded transaction sections (click the pencil icon to edit).
4. Scroll to the bottom of the report:
    a. Check the attestation box.
    b. In the signature pane, draw your signature.
    c. Enter your first and last name.
5. Click "Submit" to file the report.

Result

The amendment is submitted and version-numbered nested with the original. The "Existing Reports" tab reflects the new amendment version and its submission timestamp.

See Also

File a Campaign Finance Report

File an Independent Expenditure Report

Background

Independent Expenditure Reports must be reviewed, digitally signed, and submitted to comply with filing requirements.

Steps

1. Click "Filings" in the left-hand menu, then select "Independent Expenditure Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period".
3. Review the Filing Information section, which shows your committee's details and report data.
4. Review the Summary section.
5. For each transaction type listed below the summary:
    a. Click the transaction type heading to expand its related transactions and any unitemized total.
    b. Click the plus sign beside a transaction to view detailed fields.
    c. (Optional) Click the pencil icon to edit a transaction.
    d. (Optional) Click the trash can icon to delete a transaction.
6. Scroll to the bottom of the report:
    a. Check the attestation box.
    b. In the signature pane, draw your signature.
    c. Enter your first and last name.
7. Click "Submit" to file the report.

Result

The draft independent expenditure report is submitted, and you receive confirmation. Submitted reports appear under the "Existing Reports" tab.

See Also

Amend an Independent Expenditure Report

Amend Committee Registration

Amend an Independent Expenditure Report

Background

Campaign Finance Reports must be reviewed, digitally signed, and submitted to comply with filing requirements.

Steps

1. Click "Filings" in the left-hand menu, then select "Independent Expenditure Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period" for the report that needs to be amended.
3. Make any necessary edits or additions to transactions in the expanded transaction sections (click the pencil icon to edit).
4. Scroll to the bottom of the report:
   a. Check the attestation box.
   b. In the signature pane, draw your signature.
   c. Enter your first and last name.
5. Click "Submit" to file the report.

Result

The amendment is submitted and version-numbered nested with the original. The "Existing Reports" tab reflects the new amendment version and its submission timestamp.

See Also

File an Independent Expenditure Report

File a Statement of No Activity

Background

If no contributions, expenditures, or gifts occurred during a filing period, a Statement of No Activity must be filed.

Steps

1. Click "Filings" in the left-hand menu, then select "Campaign Finance Report."
2. On the "Current Draft" tab, choose the appropriate "Election Cycle" and "Filing Period".
3. Review the Filing Information section, which shows your committee's details and report data.
4. Check the attestation boxes and enter your first and last name.
5. In the signature pane, draw your signature.
6. Click "File Statement of No Activity".

Result

A Statement of No Activity is submitted for the filing period and listed under the "Existing Reports" tab.

See Also

File a Campaign Finance Report

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View Previously Submitted Campaign Finance Reports

Background

Reviewing past filings lets you verify submissions, check amendment history, and access filed reports.

Steps

1. Click "Filings" in the left-hand menu, then select "Campaign Finance Report."
2. Select the "Existing Reports" tab.
3. (Optional) Filter reports by using the "Report Year" dropdown.
4. In the results grid, review columns:
    a. Filing Period
    b. Reporting Period
    c. Amendment Version (0 = original; 1+ = amendment number)
    d. Date Submitted
5. Click the arrow on any row of reports with amendments to reveal any previous versions of the report.
6. Click "View" in any row to open the filed report.

Result

The selected report displays its Filing Information, Summary, and all transaction sections.

See Also

File a Campaign Finance Report

Amend a Campaign Finance Report

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Notifications

View Messages

Background

Filers and administrators can exchange messages through the system.

Steps

1. Click "Notifications" in the left-hand menu.
2. In the Inbox, review the list of messages sorted newest first.
3. Click any message row to open the full thread in the right pane.
4. Click the message row again in order to deselect the message.

Result

The selected message thread displays with all exchanged messages in chronological order.

See Also

Reply to a Message

Send a New Message

Background

When you need to communicate with an administrator, send a new message directly from the system.

Steps

1. Click "Notifications" in the left-hand menu.
2. Click "New Message" in the top right corner.
3. In "Subject," enter a concise topic.
4. In the message body, type your question or comment.
5. (Optional) Attach a file by clicking the paperclip icon, selecting your file, then clicking "Save."
6. Click "Send."

Result

Your message appears at the top of the Inbox, and administrators receive a notification.

See Also

Reply to a Message

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Reply to a Message

Background

Replying to existing conversations lets you follow up or clarify previous discussions.

Steps

1. Click “Notifications” in the left-hand menu.
2. Click the message thread you want to respond to.
3. Click “Add Reply” at the top right of the page.
4. Type your response.
5. Click “Send.”

Result

Your reply is appended to the thread and the original sender receives a notification.

See Also

View Messages

Archive a Message

Background

Archiving completed or resolved threads keeps your Inbox focused on active conversations.

Steps

1. Click "Notifications" in the left-hand menu.
2. Click the archive icon (a tray with a downward arrow) in the top right of the message row.

Result

The thread is removed from the active "Messages" and stored in the "View Archived Messages" section.

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Calendar

View Calendar

Background

The calendar displays all filing deadlines and election dates, allowing you to export them to your personal calendar.

Steps

1. Click “Calendar” in the left-hand menu.
2. Review the color-coded events on the calendar grid.
3. Click “Download Calendar” in the bottom right to get an .ics file.

Result

An .ics file downloads for import into external calendar apps (Google Calendar, Outlook, etc.), and the on-screen calendar highlights your relevant deadlines.

Help Page

Help for Filers

Background

The Help page provides quick links to FAQs, laws and rules, the user manual, and a contact form for additional support.

Steps

1. Click "Help for Filers" in the top header.
2. The Help page displays:
    a. FAQs: click the link to view frequently asked questions.
    b. Laws and Rules: click the link to open the city's official campaign finance statutes and forms.
    c. User Manual: click the link to download or view the PDF user guide.
3. To send a support inquiry, scroll to the contact form on the right:
    a. Enter Full Name and Email Address.
    b. (Optional) Enter Committee Name.
    c. Enter Subject and Message.
    d. Click "Send."

Result

All resources are accessible via links provided on the page.