

# C-SMART HELP

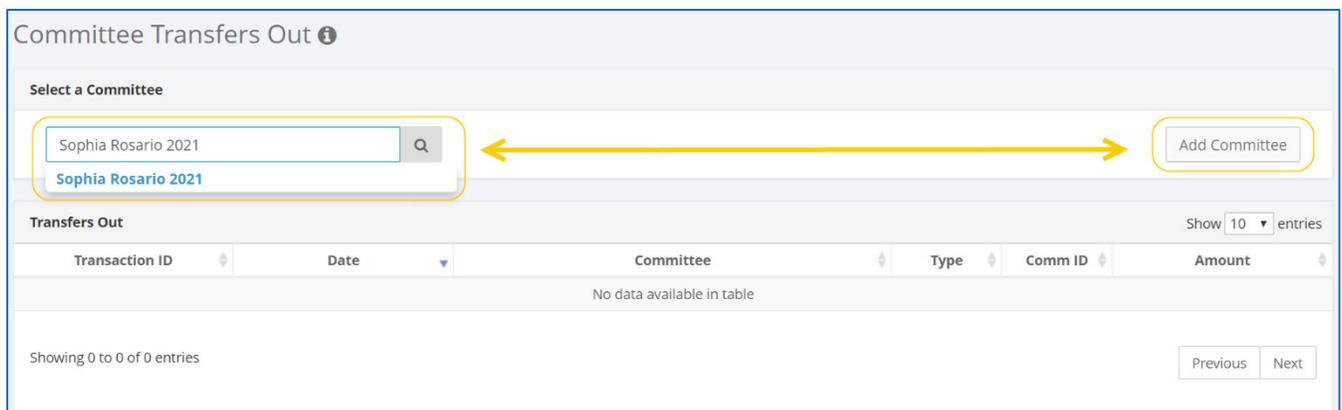
## COMMITTEE TRANSFERS OUT

### HOW TO ADD A TRANSFER OUT

1. Go to **Committee Transfers Out**.
  - Hover your cursor over **Transactions** and click **Committee Transfers Out**.



2. Use the **Search Committee** bar to find the committee receiving the transferred funds OR click **Add Committee** to create a new record.



### 3. Click **Add Transfer Out**.

Committee Transfers Out ⓘ

Select a Committee

Search Committee

**Profile**

**Name:** Sophia Rosario 2021  
**Address:** 100 Church Street  
 New York NY 10007  
**Boro:** Manhattan Candidate Committee

**Totals**

**Total Transferred Out:** \$0.00

**Transfers Out**

| Transaction ID | Date | Committee | Type | Amount |
|----------------|------|-----------|------|--------|
| No records     |      |           |      |        |

### 4. Enter the details of the transfer and click **Save**.

- C-SMART will alert you if you leave out required information. Complete the fields as follows:
  - ◆ **Committee:** Select the committee making the transfer. C-SMART will default to your principal committee, but you may select a different one if necessary.
  - ◆ **Transfer Date:** Enter the transfer date.
  - ◆ **Amount:** Enter the amount of the transfer.
  - ◆ **Check Number:** Enter the number of the check used to make the transfer or “EFT” if the transfer was made electronically.
  - ◆ **Bank Account:** Select the bank account from which the transfer is being made.
  - ◆ **Runoff/Rerun:** Check this box if the transfer was for an anticipated runoff or court-ordered rerun. See the [Runoff Elections](#) guidance document for more information.
  - ◆ **Segregated:** Indicate if the transfer was made with a segregated bank account. See Chapter 6 of the [Handbook](#) for information on segregated bank accounts.
  - ◆ **Transfer Out Types:** Indicate the transfer type. For more information, review the [Transfers](#) guidance document.
  - ◆ **Notes:** Enter any additional information. The CFB cannot review what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

**Enter Details**

**\*Committee:** Sophia for Council

**\*Transfer Date:** 02/19/2019

**\*Amount:** \$ 1,000.00

**\*Check Number:** 123

**\*Bank Account:** Smart Savings Bank(\*\*\*\*3522)

**Runoff/Rerun:**

**Segregated:**

Type 1: Funds disbursed to a party or constituted committee (subject to Campaign Finance Act expenditure limits).

Type 2: A:  Transfers to a committee solely supporting the same candidate in the same election.  
B:  Transfers to a committee solely supporting the same candidate in another election.

**Notes:**  
[For Campaign Use Only]

 **Save** Cancel

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**Best Practice:**

- ◆ Use the tab key to navigate between fields.

**Important:**

- ◆ Upon clicking **Save**, if a warning message pops up, read it. It might refer to a potentially urgent compliance issue.
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5. Your transaction has been successfully saved.

- Once you hit save, C-SMART will return you to the **Committee Transfer Out** page. The **Totals** box and list of transfers will be updated to reflect the newly saved transaction.

The screenshot shows a green notification banner at the top: "The Transfer Committee Record has been successfully updated." Below this, the page title is "Committee Transfer Out" with a "Back to Sophia Rosario 2021" link. The transaction ID is 8455 and the statement is N/A. There are "Edit" and "Delete" buttons. The "Profile" section shows: Name: Sophia Rosario 2021, Address: 100 Church Street, New York NY 10007, Boro: Manhattan Candidate Committee. The "Totals" section shows: Total Transferred Out: \$1,000.00. A yellow arrow points to the success message.

**Best Practice:** Write the C-SMART **Transaction ID** on any related documentation, including the copy of the transfer check.

## HOW TO EDIT A TRANSFER OUT

- Go to the recipient committee's **Committee Transfers Out** page.
  - Click the transfer's **Transaction ID**.

The screenshot shows the "Committee Transfers Out" page. At the top, there is a "Select a Committee" section with a search box and an "Add Committee" button. Below this is the "Profile" section with the same information as the previous screenshot. To the right is the "Totals" section showing "Total Transferred Out: \$1,000.00". At the bottom is the "Transfers Out" section with a table and an "Add Transfer Out" button. The table has columns for Transaction ID, Date, Committee, Type, and Amount. The first row shows Transaction ID 8455 (circled in red with a red arrow pointing to it), Date 2/19/2019, Committee Sophia Rosario 2021, Type 2B, and Amount \$1,000.00.

| Transaction ID | Date      | Committee           | Type | Amount     |
|----------------|-----------|---------------------|------|------------|
| 8455           | 2/19/2019 | Sophia Rosario 2021 | 2B   | \$1,000.00 |

2. Click **Edit**.

Committee Transfer Out ← Back to Sophia Rosario 2021

Transaction ID: 8455 Statement: N/A

**Profile**

**Name:** Sophia Rosario 2021  
**Address:** 100 Church Street  
New York NY 10007  
**Boro:** Manhattan Candidate Committee

**Totals**

**Total Transferred Out:** \$1,000.00

Edit Delete

3. Modify the necessary fields and then click **Save**.

**Edit Details**

**\*Committee:** Sophia for Council

**\*Transfer Date:** 02/19/2019

**\*Amount:** \$ 1,500.00

**\*Check Number:** 123

**\*Bank Account:** Smart Savings Bank(\*\*\*\*3522)

**Void Check:**  **Void Date:**

**Runoff/Rerun:**

**Segregated:**

Type 1: Funds disbursed to a party or constituted committee (subject to Campaign Finance Act expenditure limits).

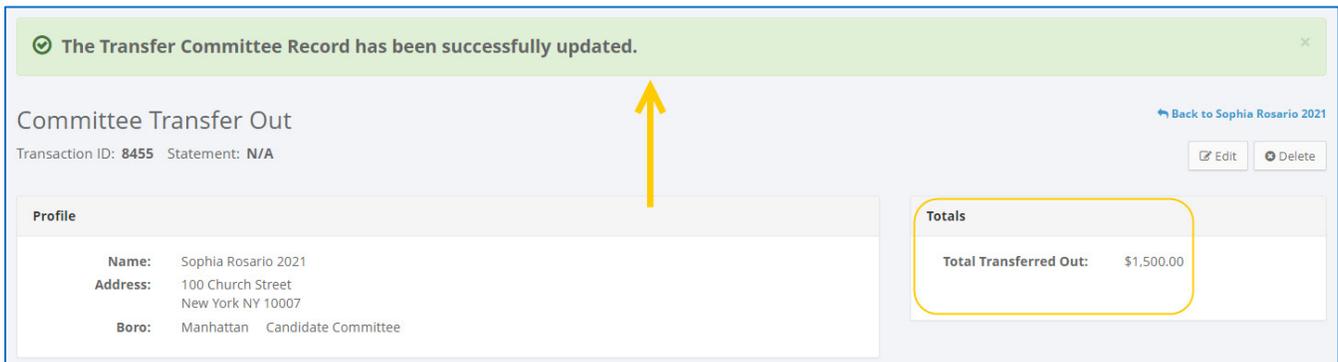
Type 2: A:  Transfers to a committee solely supporting the same candidate in the same election.  
B:  Transfers to a committee solely supporting the same candidate in another election.

**Notes:**  
[For Campaign Use Only]

Save Cancel

**Important:** The timestamp at the bottom will be updated to show who last modified the transaction.

- The transfer out has been successfully edited.



Committee Transfer Out

Transaction ID: 8455 Statement: N/A

[Back to Sophia Rosario 2021](#)

Edit Delete

**Profile**

Name: Sophia Rosario 2021  
Address: 100 Church Street  
New York NY 10007  
Boro: Manhattan Candidate Committee

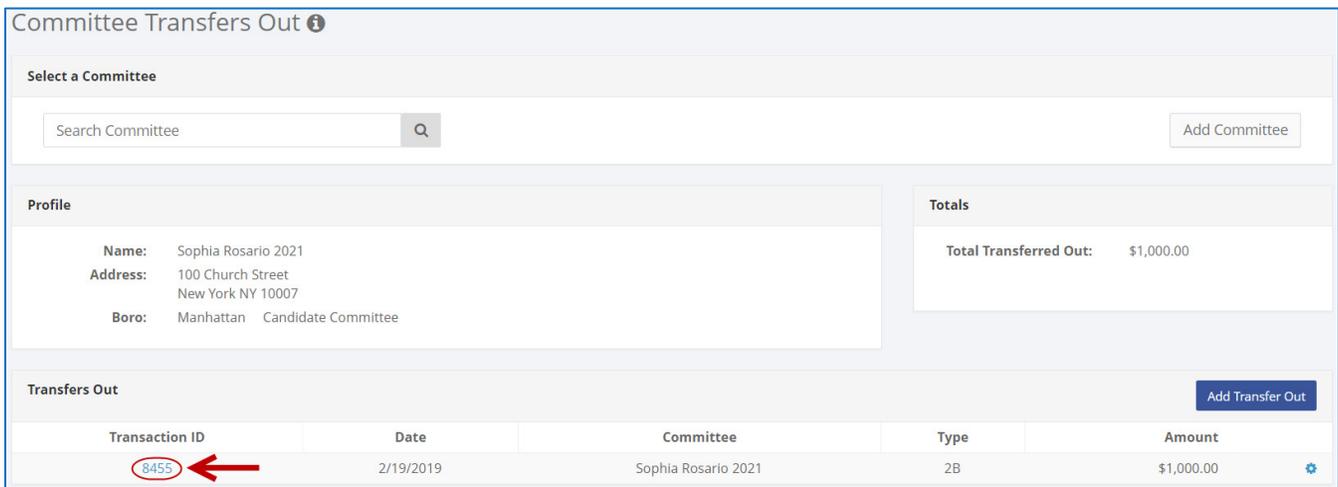
**Totals**

Total Transferred Out: \$1,500.00

A green banner at the top reads: "The Transfer Committee Record has been successfully updated." A yellow arrow points from the banner to the "Delete" button.

## HOW TO DELETE A TRANSFER OUT

- Go to the recipient committee's **Committee Transfers Out** page.
  - Click the transfer's **Transaction ID**.



Committee Transfers Out ⓘ

Select a Committee

Search Committee

**Profile**

Name: Sophia Rosario 2021  
Address: 100 Church Street  
New York NY 10007  
Boro: Manhattan Candidate Committee

**Totals**

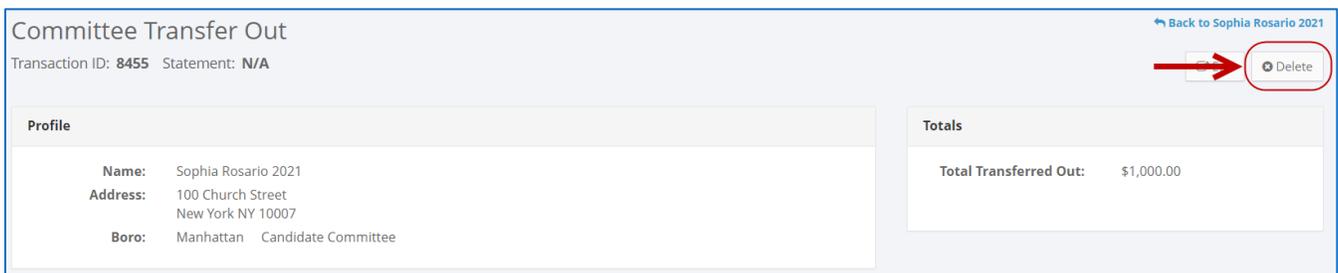
Total Transferred Out: \$1,000.00

**Transfers Out**

| Transaction ID | Date      | Committee           | Type | Amount     |
|----------------|-----------|---------------------|------|------------|
| 8455           | 2/19/2019 | Sophia Rosario 2021 | 2B   | \$1,000.00 |

A red circle highlights the Transaction ID "8455" in the table, with a red arrow pointing to it.

- Click **Delete** to proceed.
  - Click **Yes** on the window that opens to complete the deletion.



Committee Transfer Out

Transaction ID: 8455 Statement: N/A

[Back to Sophia Rosario 2021](#)

Edit Delete

**Profile**

Name: Sophia Rosario 2021  
Address: 100 Church Street  
New York NY 10007  
Boro: Manhattan Candidate Committee

**Totals**

Total Transferred Out: \$1,000.00

A red circle highlights the "Delete" button, with a red arrow pointing to it.

3. The transfer out has been successfully deleted.

The screenshot displays a web interface for 'Committee Transfers Out'. At the top, a green notification bar with a checkmark icon states 'Your Transaction has been successfully deleted.' Below this, the page title is 'Committee Transfers Out' with an information icon. A section titled 'Select a Committee' contains a search box labeled 'Search Committee' with a magnifying glass icon and an 'Add Committee' button. The main content area is split into two columns. The left column, titled 'Profile', lists: Name: Sophia Rosario 2021, Address: 100 Church Street, New York NY 10007, and Boro: Manhattan Candidate Committee. The right column, titled 'Totals', shows 'Total Transferred Out: \$0.00'. A yellow arrow points from the search box area up to the notification bar.

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**Important:** You should generally only delete a transaction if it was entered in error.

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