

# C-SMART HELP

## HOME PAGE

The C-SMART home page is the central hub for all of C-SMART’s primary functions. The home page also displays key dates, a summary of your financial activity, and shortcuts to commonly used pages.

**C-SMART**  
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help ▾ srosar1389 ▾

Transactions
Documentation
Reports
Submission

Certification Deadline: 6/10/2021    Primary Date: 9/14/2021    Election Date: 11/2/2021

**\$2,275.00**  
MONEY RAISED

**7**  
TOTAL CONTRIBUTIONS

**105**  
DAYS LEFT TO NEXT FILING

**Enter Transactions**

You must enter all financial activity into C-SMART as it occurs. Below are the most commonly used transaction types.

[Enter Monetary Contributions](#)  
[Enter Bills](#)

**Upload Documentation**

Link your scanned documentation to transactions entered into C-SMART.

[Upload Monetary Contribution Documentation](#)  
[Upload Bank Record Documentation](#)  
[Upload Expenditure Documentation](#)

**Submit Disclosure ⓘ**

Throughout the election cycle and post-election period, you are required to submit disclosure statement filings to the CFB and the New York State Board of Elections (BOE).

[Submit CFB Disclosure](#)  
[Generate BOE Disclosure](#)

Reminder: You must review the [NYC Votes Contributions Report](#), merge any duplicate name records, and claim eligible contributions for match.

Total Financial Activity

AT A GLANCE: FINANCIAL ACTIVITY TO DATE

Date	Receipts (\$k)	Disbursements (\$k)
JUL 12, 2018	~\$1k	~\$1k
JAN 11, 2019	~\$2k	~\$16k

Current Balance in Cash Flow Report

Disclosure Statement Deadlines

#	FILING DEADLINE	DISCLOSURE PERIOD	STATUS
1	July 16, 2018	January 13, 2018 – July 12, 2018	✓ Submitted
2	January 15, 2019	July 13, 2018 – January 11, 2019	🕒 Next
3	July 15, 2019	January 12, 2019 – July 11, 2019	–
4	January 15, 2020	July 12, 2019 – January 11, 2020	–

Show More

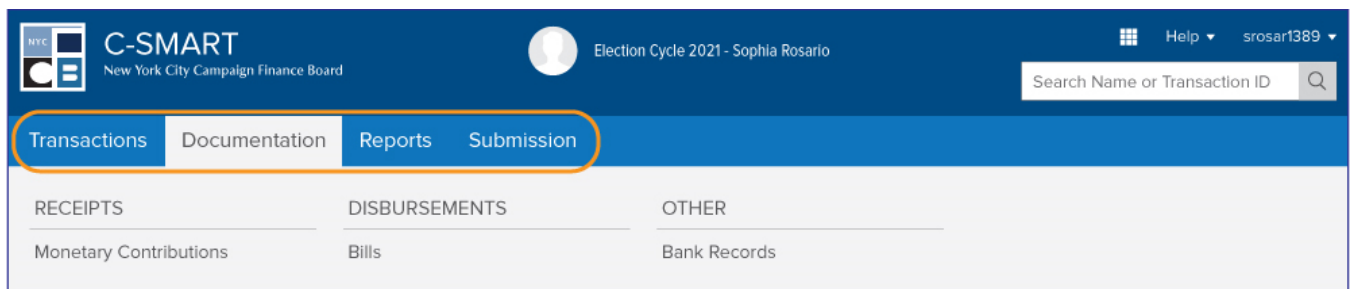
## **RETURNING TO THE HOMEPAGE**

- The C-SMART logo on the upper left-hand side of the screen is actually a link to the homepage, available from any other page within C-SMART.



## **NAVIGATING TAB MENUS**

- You can navigate through C-SMART using the tab bar below the logo. Each option will open up a menu of subpages when you scroll over it. Almost all C-SMART functions fall under the four categories on the tab bar that runs across the screen: **Transactions**, **Documentation**, **Reports**, and **Submission**.
- Hover your cursor over one of these tabs to open a menu of various C-SMART functions.



## **AUTOMATIC REMINDERS**


- At the top of the page, C-SMART will remind you of:
  - ◆ Certification Deadline- the deadline to join the [Matching Funds Program](#) for the selected election cycle
  - ◆ Primary Date – for the selected election cycle, if applicable
  - ◆ Election Date – for the general election or special election, if applicable

**Important:** C-SMART will also count the number of days until the next [disclosure statement deadline](#), in addition to your total funds raised and total number of contributors.

The screenshot shows the C-SMART user interface. At the top left is the C-SMART logo and 'New York City Campaign Finance Board'. The user is logged in as 'Election Cycle 2021 - Sophia Rosario'. A search bar is present with the text 'Search Name or Transaction ID'. Below the navigation tabs (Transactions, Documentation, Reports, Submission), a summary bar displays: 'Certification Deadline: 6/10/2021', 'Primary Date: 9/14/2021', and 'Election Date: 11/2/2021'. Below this, three key metrics are shown: '\$2,275.00 MONEY RAISED', '7 TOTAL CONTRIBUTIONS', and '105 DAYS LEFT TO NEXT FILING'.

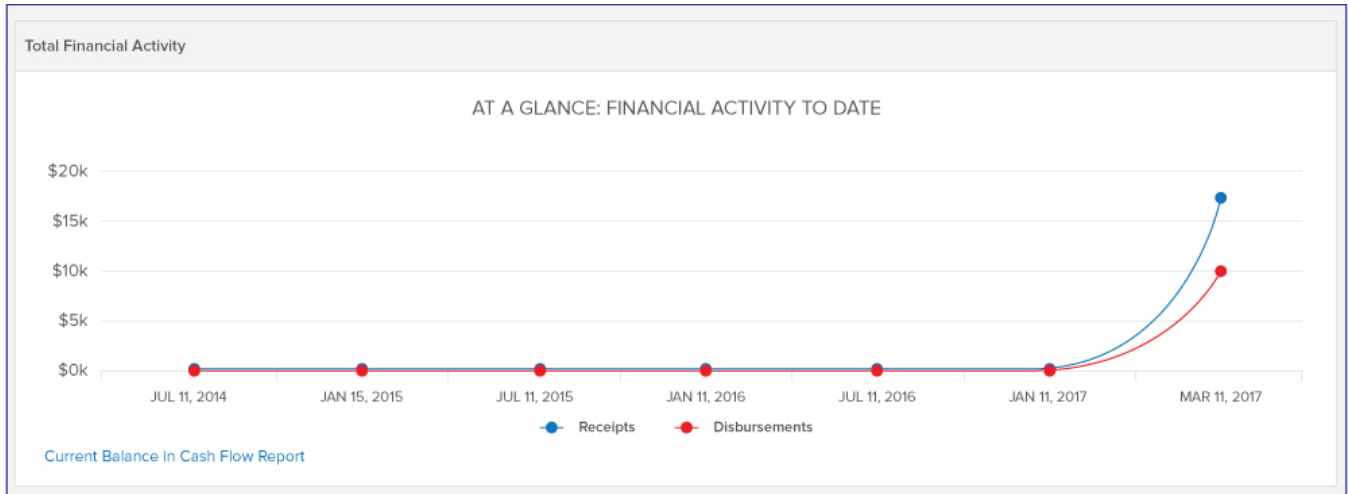
➤ From the homepage, you can access these shortcuts:

- ◆ [Monetary Contributions](#)
- ◆ [Bills](#)
- ◆ [Upload Monetary Contribution Documentation \(Bulk\)](#)
- ◆ [Submit CFB Disclosure](#)
- ◆ [NYC Votes Contributions Report](#)

<p><b>Enter Transactions</b></p> <p>You must enter all financial activity into C-SMART as it occurs. Below are the most commonly used transaction types.</p> <p><a href="#">Enter Monetary Contributions</a></p> <p><a href="#">Enter Bills</a></p>	<p><b>Upload Documentation</b></p> <p>Link your scanned documentation to transactions entered into C-SMART.</p> <p><a href="#">Upload Monetary Contribution Documentation (Bulk)</a></p>	<p><b>Submit Disclosure ⓘ</b></p> <p>Throughout the election cycle and post-election period, you are required to submit disclosure statement filings to the CFB and the New York State Board of Elections (BOE).</p> <p><a href="#">Submit CFB Disclosure</a></p> <p><a href="#">Generate BOE Disclosure</a></p>
<p> <b>Reminder:</b> You must review the <a href="#">NYC Votes Contributions Report</a>, merge any duplicate name records, and claim eligible contributions for match.</p>		

## FINANCIAL ACTIVITY

- The homepage displays a graph of your campaign’s financial activity to date. It include all “receipts” and “disbursements” based on your disclosure statement filings.



## DISCLOSURE STATEMENT DEADLINES

- This section lists recent and upcoming disclosure deadlines along with the statement number, disclosure period, and status. Expand the list by clicking **Show More**.

Disclosure Statement Deadlines			
#	FILING DEADLINE	DISCLOSURE PERIOD	STATUS
5	July 15, 2016	January 12, 2016 – July 11, 2016	✓ Submitted
6	January 17, 2017	July 12, 2016 – January 11, 2017	✓ Submitted
7	March 15, 2017	January 12, 2017 – March 11, 2017	🕒 Next
8	May 15, 2017	March 12, 2017 – May 11, 2017	–
9	July 17, 2017	May 12, 2017 – July 11, 2017	–

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