

C-SMART HELP

LOANS

HOW TO ADD A LOAN

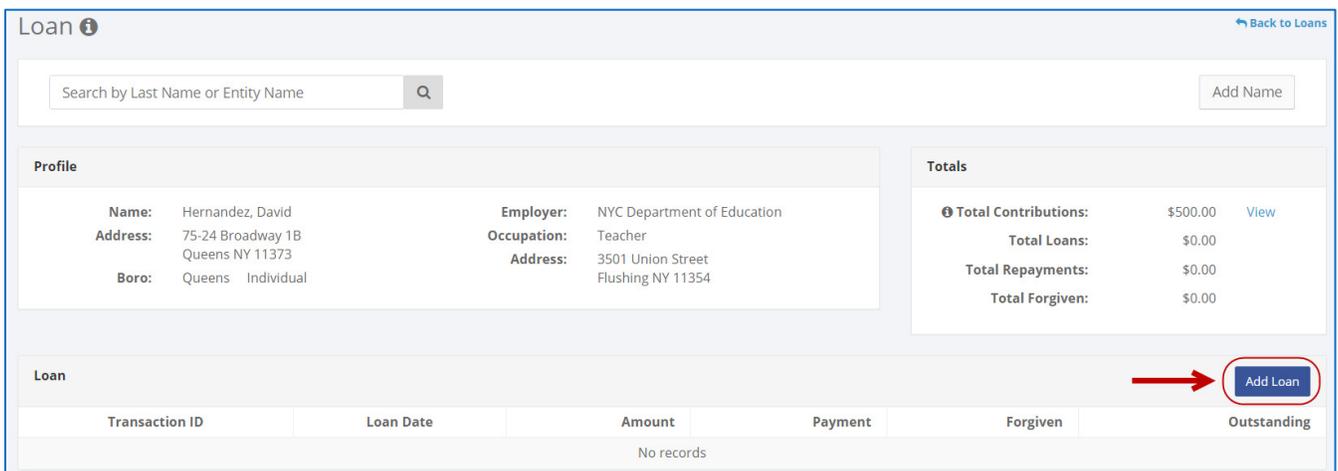
1. Go to **Loans**.
 - Hover your cursor over **Transactions** and click **Loans**.



2. Use the **Search by Last Name or Entity Name** bar to find the lender OR click **Add Name** to create a new record.



3. Click **Add Loan**.



4. Enter and save the loan details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Loan Date:** Enter the date the loan was received.
 - ◆ **Amount:** Enter total amount of the loan.
 - ◆ **Committee:** Select the committee receiving the loan. C-SMART will default to your principal committee, but you can select a different one if necessary.
 - ◆ **Bank Loan:** Check this box if the loan was from a bank or other financial institution.
 - ◆ **Runoff/Rerun:** Check this box if the loan was for an expected runoff or court-ordered rerun election. Accepting loans for a runoff is allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
 - ◆ **Segregated:** Indicate if the loan was collected through a segregated bank account. See Chapter 6 of the [Handbook](#) for guidance on segregated bank accounts
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Enter Details

*Loan Date: 10/30/2018

*Amount: \$50.00

*Committee: Sophia for Council

Bank Loan:

Runoff / Rerun:

Segregated:

Notes:
[For Campaign Use Only]

Save Cancel

Best Practice:

- ◆ Use the tab key to navigate between fields.

Important:

- ◆ If a warning appears on clicking **Save**, read it. It might refer to a compliance issue.
- ◆ Loans not repaid by Election Day, in part or in whole, are also considered contributions, subject to the relevant limits and restrictions.

5. The loan has been successfully saved.

- At this point, C-SMART will return you to the lender’s **Loans** page. The **Totals** box and list of loans will be updated to reflect the newly saved transaction.

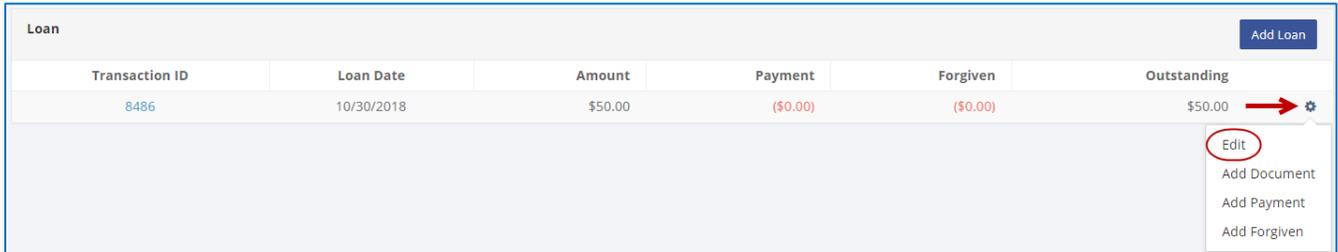
The screenshot displays the C-SMART Loans interface. At the top, a green notification bar states "Your transaction has been successfully saved." Below this, the "Loan" section includes a search bar and a "Back to Loans" link. The "Profile" section shows details for David Hernandez, a teacher at NYC Department of Education. The "Totals" section displays: Total Contributions: \$500.00, Total Loans: \$50.00, Total Repayments: \$0.00, and Total Forgiven: \$0.00. A "Loan" table at the bottom lists one transaction with ID 8486, dated 10/30/2018, for an amount of \$50.00.

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$50.00	(\$0.00)	(\$0.00)	\$50.00

Best Practice: Write the C-SMART **Transaction ID** on the copies of the committee check, [loan agreement](#), or other related documentation.

HOW TO EDIT A LOAN

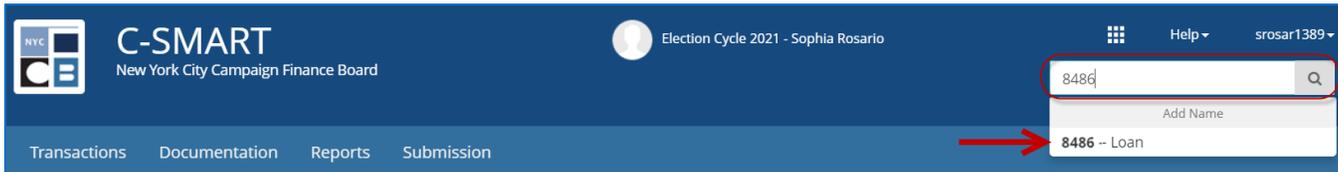
1. Go to the lender's **Loans** page.
 - Click the **gear** and then **Edit** OR enter the loan's **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.



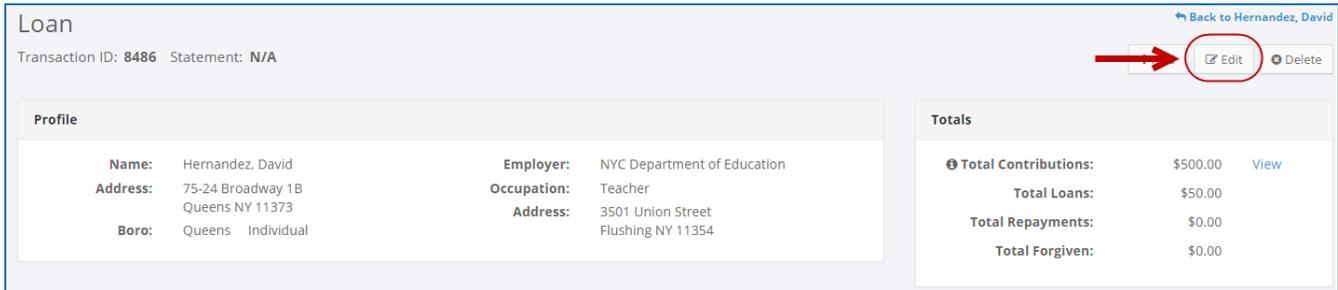
Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$50.00	(\$0.00)	(\$0.00)	\$50.00

The screenshot shows a table with columns for Transaction ID, Loan Date, Amount, Payment, Forgiven, and Outstanding. A red arrow points to a gear icon next to the \$50.00 value in the Outstanding column. A dropdown menu is open, with the 'Edit' option circled in red.

OR

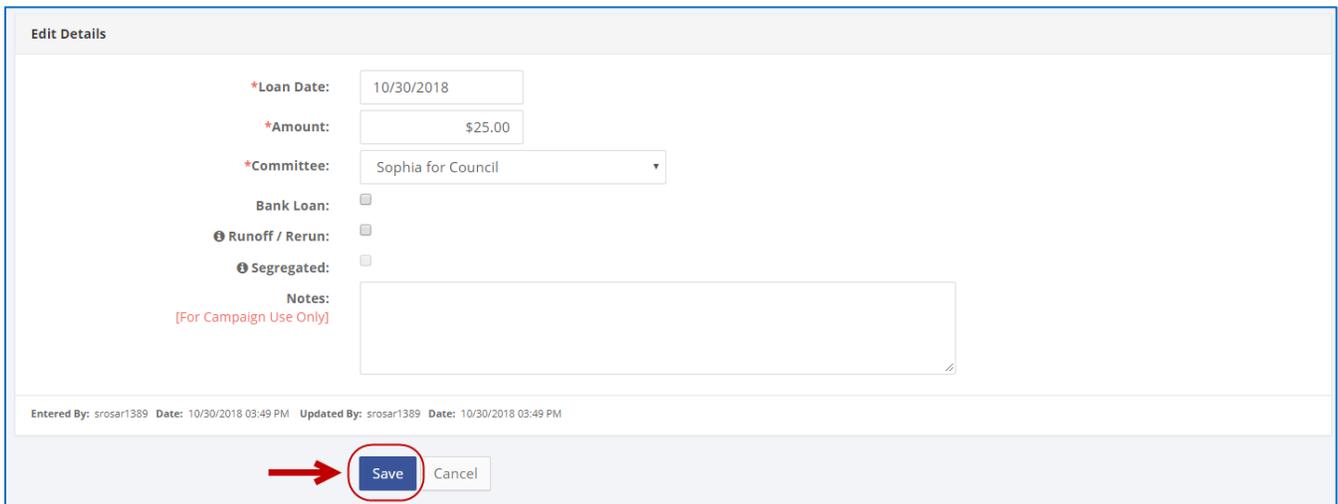


The screenshot shows the C-SMART header with a search bar containing '8486'. A dropdown menu is open below the search bar, showing '8486 -- Loan' as a result. A red arrow points to the search bar.



The screenshot shows the 'Loan' details page for Transaction ID: 8486. The 'Profile' section includes Name: Hernandez, David; Address: 75-24 Broadway 1B, Queens NY 11373; Boro: Queens Individual; Employer: NYC Department of Education; Occupation: Teacher; Address: 3501 Union Street, Flushing NY 11354. The 'Totals' section shows Total Contributions: \$50.00, Total Loans: \$50.00, Total Repayments: \$0.00, and Total Forgiven: \$0.00. A red arrow points to the 'Edit' button in the top right corner, which is circled in red.

2. Modify the necessary fields and click **Save**.



The screenshot shows the 'Edit Details' form with fields for Loan Date (10/30/2018), Amount (\$25.00), and Committee (Sophia for Council). There are checkboxes for Bank Loan, Runoff / Rerun, and Segregated. A Notes field is present with the text '[For Campaign Use Only]'. At the bottom, a red arrow points to the 'Save' button, which is circled in red.

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

3. The loan has been successfully edited.

Your transaction has been successfully saved.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

HOW TO DELETE A LOAN

1. Go to the lender's **Loans** page.

➤ Click the loan's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

OR

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

Election Cycle 2021 - Sophia Rosario

Help srosar1389

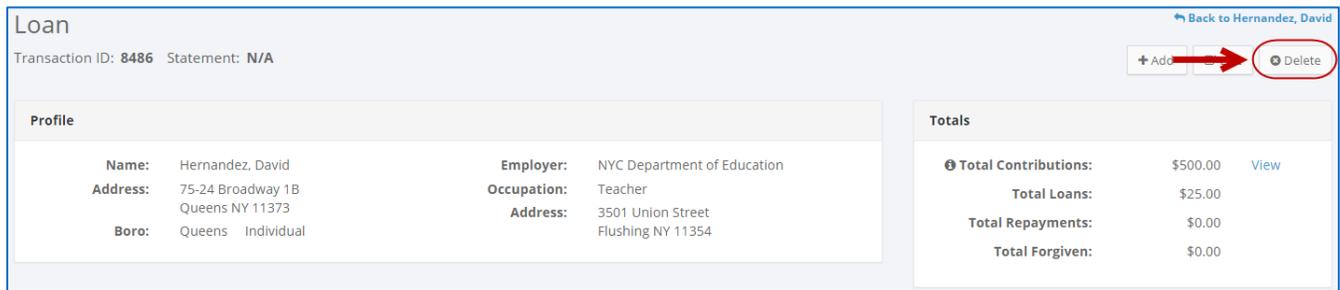
8486

Add Name

8486 - Loan

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.



Loan

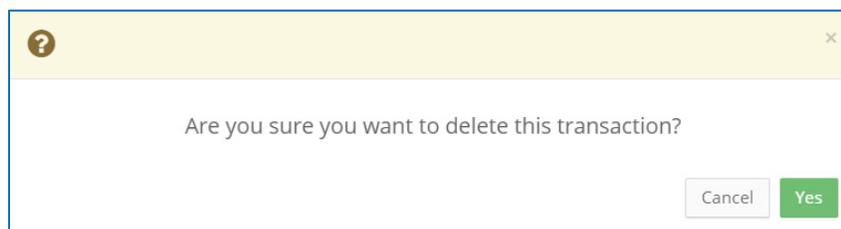
Transaction ID: 8486 Statement: N/A

Back to Hernandez, David

+ Add **Delete**

Profile		Totals	
Name:	Hernandez, David	Total Contributions:	\$500.00 View
Address:	75-24 Broadway 1B Queens NY 11373	Total Loans:	\$25.00
Boro:	Queens Individual	Total Repayments:	\$0.00
Employer:	NYC Department of Education	Total Forgiven:	\$0.00
Occupation:	Teacher		
Address:	3501 Union Street Flushing NY 11354		

➤ Click **Yes** on the window that opens to complete the deletion.

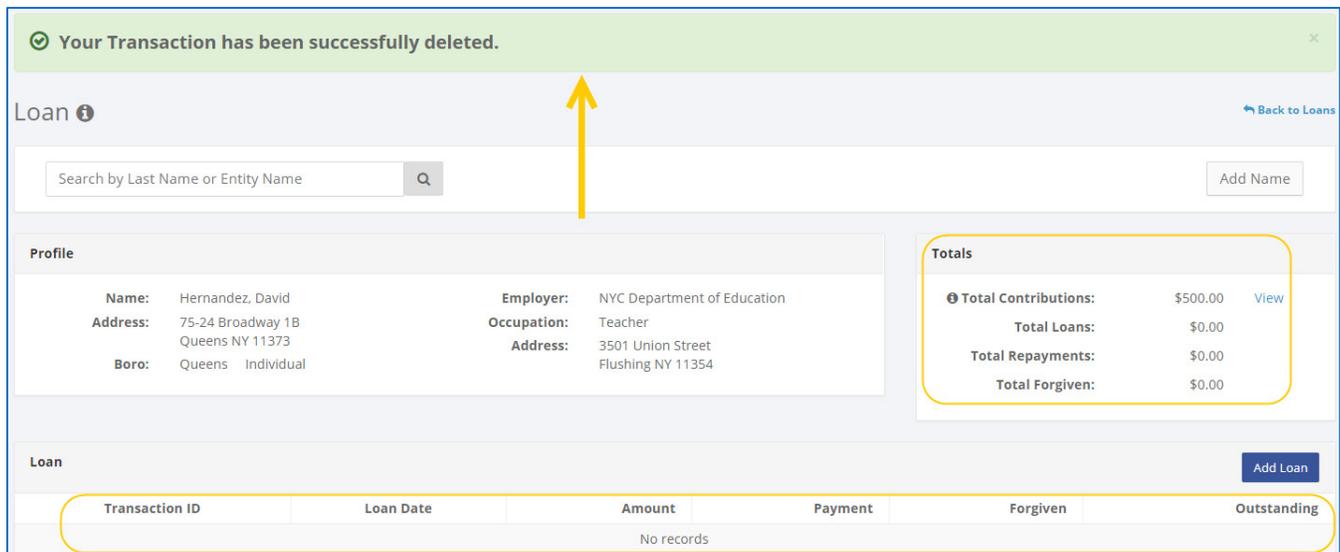


?

Are you sure you want to delete this transaction?

Cancel Yes

3. The loan has been successfully deleted.



✔ Your Transaction has been successfully deleted.

Loan ⓘ

Back to Loans

Search by Last Name or Entity Name

Profile		Totals	
Name:	Hernandez, David	Total Contributions:	\$500.00 View
Address:	75-24 Broadway 1B Queens NY 11373	Total Loans:	\$0.00
Boro:	Queens Individual	Total Repayments:	\$0.00
Employer:	NYC Department of Education	Total Forgiven:	\$0.00
Occupation:	Teacher		
Address:	3501 Union Street Flushing NY 11354		

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
No records					

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