

Election 2019



Campaign Finance Report and Forms Frequently Asked Questions (FAQs)

Q. Where are the campaign finance report template and forms located?

A. The campaign finance report and forms are located on the City's website at the following URL: <https://www.rockvillemd.gov/elections>. From that page, click the link **Running for Office**, then scroll down to the second section. The campaign finance report and forms to be used are outlined in red in the screen shot below. A sample campaign finance report as well as instructions for completing the Signed Affidavit and Schedule 5 are also provided.

2

Candidate Information Election Packet

Download our complete candidate packet or pick up a hardcopy at the City Clerk's Office in City Hall, Monday-Friday from 8:30 a.m.-5 p.m.

We now offer a selection of required Section 5 documents to be completed online.

- [Campaign Finance Report Fillable Excel Spreadsheet](#)
 - [Sample Campaign Finance Report](#)
- [Signed Affidavit](#)
 - [Help Instruction for Completing Signed Affidavit](#)
- [Schedule 5: Report on Loan to Campaign Committee](#)
 - [Help Instructions for Completing Schedule 5](#)

Q. When entering a date, I received an error message indicating the date was outside the reporting period? What caused this error?

A. The date fields within the campaign finance report take advantage of Excel’s Data Validation feature. Each reporting period reflects a specific range of valid start and end dates. Please refer to the valid date ranges for each reporting period in Section 5 of the instructions. If you encounter this error, click the Retry button and enter a valid date for the appropriate reporting period.

REPORTING PERIOD: Initial Pre-Election Report (11/09/18 through 09/30/2019)

SCHEDULE 1: CONTRIBUTIONS AND OTHER RECEIPTS

Name of Campaign Committee: Friends of Frank B. Poland

Nothing to report on this schedule for this reporting period.

(1)	(2)	(3)	(4)
SECTION 1: Contributions/Receipts other than Sections 2, 3, or 4			
Date	Name	Source	
10/13/2019	Erica Smith	General Contribution (Campaign and non-Campaign Committee)	
6/11/2019	Kaylee M. Davisson	General Contribution (Campaign and non-Campaign Committee)	
9/20/2019	Jones Printing Company	Other Receipts	

Microsoft Excel

STOP! Date entered is outside the reporting period.

Retry Cancel Help

Q. On Schedule 1, when I selected a source of “Other Receipts”, a message in red text appeared to the right of column 6. What is going on?

(3)	(4)	(5)	(6)
Address	Receipt Type	Source	Amount
111 Oak View Drive Little Place, MD 20859	Cash	General Contribution (Campaign and non-Campaign Committee)	100.00
14567 Old Fence Court Rockville, MD 20850	Pay Pal or Other Similar Method	General Contribution (Campaign and non-Campaign Committee)	150.00
3456 Rockville Pike, Rockville, MD 20851	Check	Other Receipts	

Must enter a description in Column 6

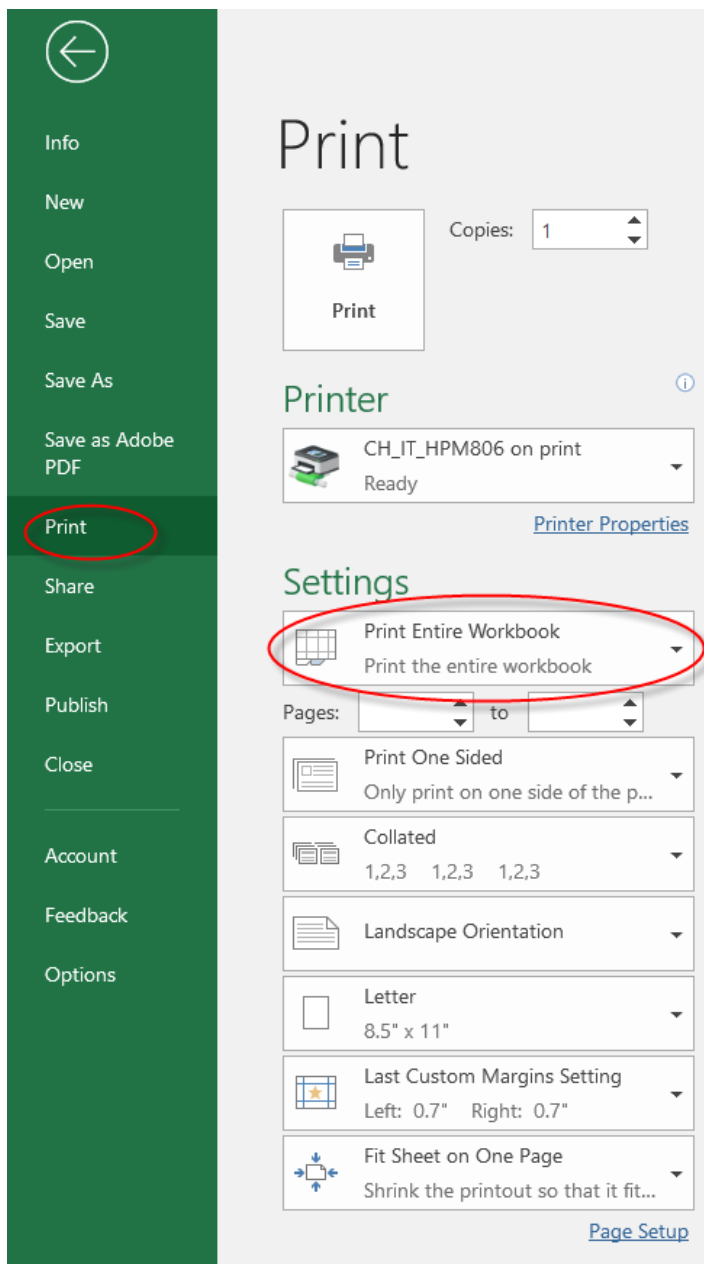
A. As described in the instruction packet, a source type of “Other Receipts” *requires* a brief description in column 6 on Schedule 1. After entering a description in Column 6, click on the message in red text and press delete.

Q. How do I save my Campaign Finance Report?

A. The Excel file downloaded from the City’s website is read-only. Once you have downloaded it, click **File**, **Save As** and select the location on your PC.

Q. How do I print the entire report? (assumes you created the report using the Excel file provided by the Board).

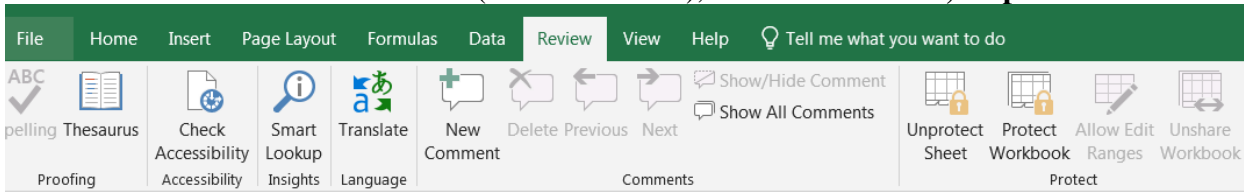
A. Click **File, Print**. Under the Settings section, click the drop-down arrow and select the option to **Print Entire Workbook**. Click the **Print** button.



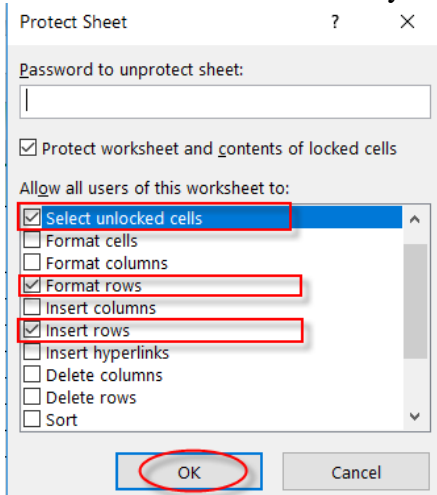
Q. How do I insert additional rows on Schedules 1 and 2? **NOTE: The following instructions pertain ONLY if you began using the campaign finance report from the City’s website prior to July 23, 2019.**

A. To insert rows, follow the steps below:

1. Position the cursor on the worksheet (Schedule 1 or 2), then click **Review, Unprotect Sheet.**

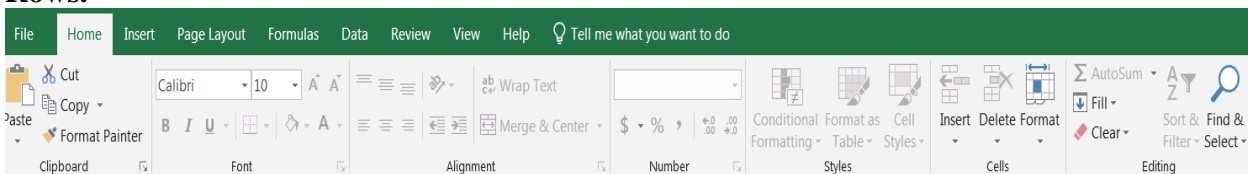


2. Click **Protect Sheet** and verify that the three options outlined in red are checked.



3. Click **OK** once you have selected the checked options shown above.

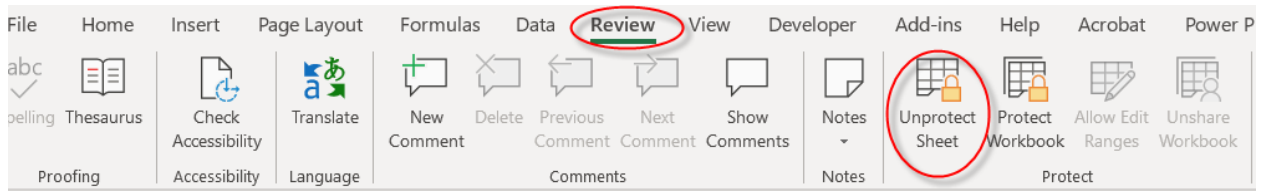
4. To insert a row, position the mouse where you want to insert the row, then click **Home, Insert, Insert Sheet Rows.**



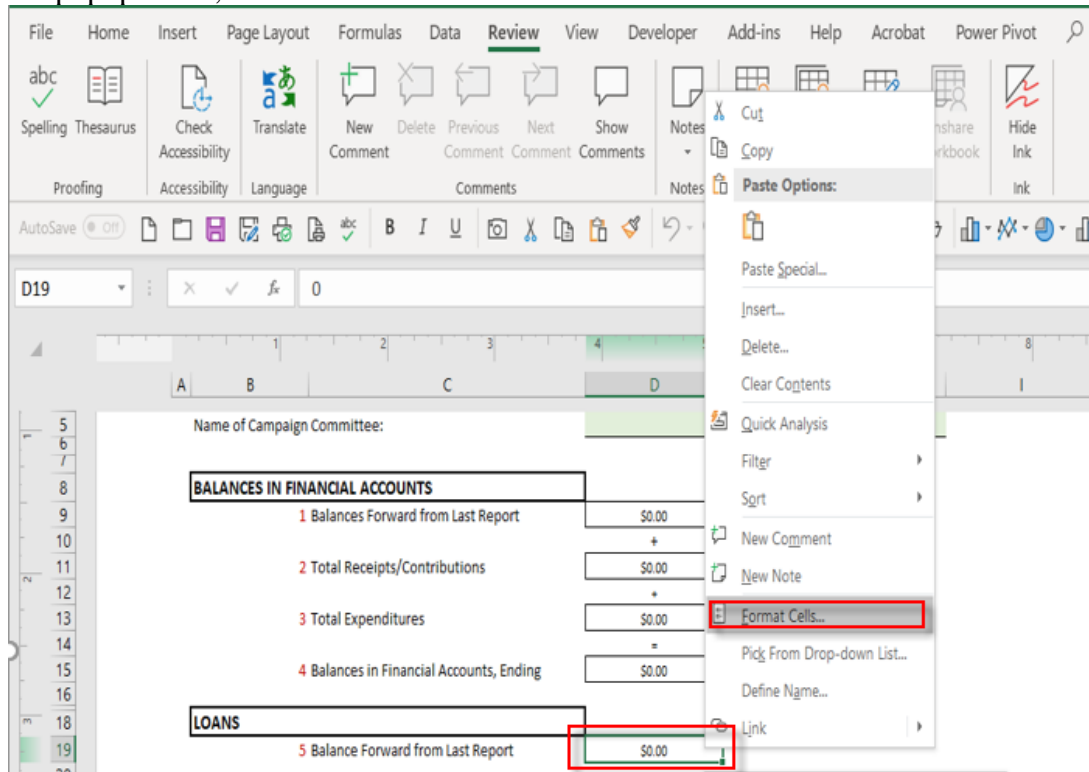
Q. On the Summary Sheet, I cannot enter an amount for “Balance Forward from Last Report” in the Loans section. **NOTE: The following instructions pertain ONLY if you began using the campaign finance report from the City’s website prior to July 23, 2019.**

A. In the online version of the Campaign Finance Report prior to July 23, 2019, the cell had mistakenly been locked. To unlock the cell and enter an amount, follow the steps below.

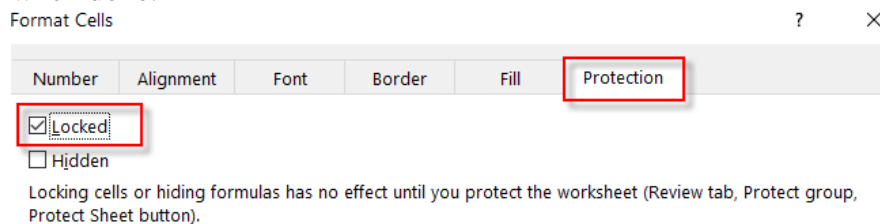
1. Open your Campaign Finance Report and click on the Summary Sheet.
2. Click **Review, Unprotect Sheet.**



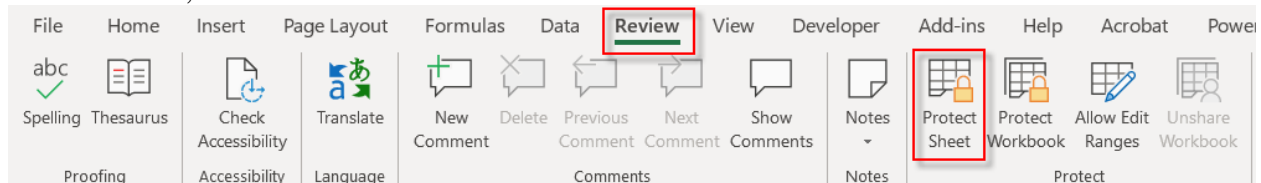
- Place the cursor in cell D19 (5 Balance Forward from Last Report) and click the right mouse button. From the popup menu, click **Format Cells**.



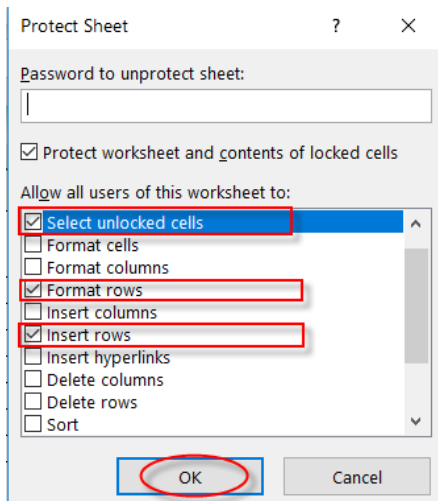
- Click the **Protection** tab, then click in the **Locked** check box to **remove** the check mark. Click **OK** when done.



- Click **Review, Protect Sheet**.



- Click **Protect Sheet** and verify that the three options outlined in red are checked.



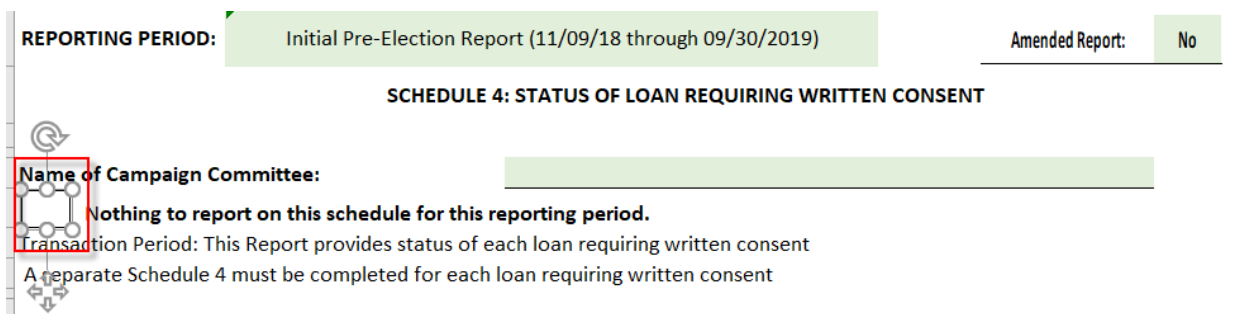
7. Click **OK** once you have selected the checked options shown above.

8. You may now continue completing your Campaign Finance Report.

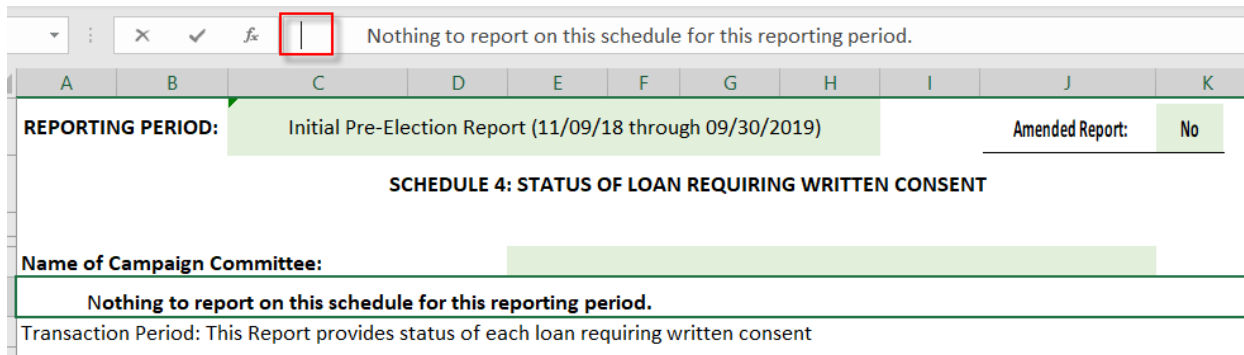
Q. I'm using the MAC version of Excel and cannot type an X to indicate "Nothing to report on this schedule for this reporting period" on Schedule 4 in Column A, Row 6.

A. In the MAC version of Excel, a **picture** of a box appears in Column A, Row 6 and therefore you cannot enter text in that location. Follow the steps below to resolve this issue on any of the schedules in your campaign finance report.

1. Unprotect the sheet.
2. Click in the little square box. In the Mac version it is a "picture". It will then appear as shown in the screen shot below with little handles around it.



3. Press the **delete** key to get rid of the box.
4. Click in front of the text "Nothing to report on this schedule for this reporting period" and type an X. Refer to screen shot below as to where to position the cursor.



5. Protect the sheet again.
6. You may now continue completing your Campaign Finance Report.

Electronic Signature Process Using DocuSign

Q. My Excel file is complete so how do I begin the electronic signature process?

A. The treasurer needs to sign the affidavit and upload the completed CFR. Once this has been completed, DocuSign sends an email to the candidate for review and signature. The candidate will then sign. Once the candidate clicks the FINISH button, an email with copies of the report and the signed affidavit will be sent to campaignfinancereport@rockvillemd.gov, the candidate and the treasurer.

Q. Who receives email messages addressed to campaignfinancereport@rockvillemd.gov?

A. Emails are received by the City Clerk/Director of Council Operations and the Deputy City Clerk. Once received, the City Clerk will send an email confirming receipt. The signed affidavit along with the campaign finance report will be posted to the City's website within 24 hours.


Q. My treasurer informed me he/she completed the electronic signature process and uploaded my completed campaign finance report, but I did not receive an email with the attachments.



A. The email message from **City of Rockville via DocuSign** may have been delivered to your SPAM or JUNK mail folder so be sure to check in folders other than your Inbox.

Q. I received the email from DocuSign along with the attachments. What are the next steps?

A. Click on **View Completed Documents** within the body of the email. You may want to save a copy of the signed affidavit for your records. Your campaign finance report will appear as a PDF attachment. The Excel version of your campaign finance report remains on the device to which it was saved.

Completed: Please Sign the Campaign Finance Affidavit

 If there are problems with how this message is displayed, click here to view it in a web browser.

 Signed Affidavit.docx.pdf 436 KB	 TESTING ON 4-9-19 Campaign Finance Report 4-8-19 (JH).pdf 596 KB
---	---

Action Items



Your document has been completed

[VIEW COMPLETED DOCUMENTS](#)

City of Rockville
DoNotReply@rockvillemd.gov