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1.0 Purpose

This is a Step-By-Step guide to assist Committees to be able to submit their Campaign Finance forms electronically using CF Solutions Campaign Finance Software with the Pima County Elections Department.

This document will only cover the steps to obtain the desktop software, specific instructions that pertain only to Pima County submissions and steps to taken to search and view all filings. Any specific information regarding the use of the desktop software can be obtained from the User Manual.

2.0 Pima County Elections Department

Elections Director: BRAD R. NELSON, CERA
Certified Elections/Registration Administrator

Pima County Elections Department
6550 S. Country Club Road
Tucson, AZ 85756

Phone: (520) 351-6830
FAX: (520) 351-6870
TTY: (520) 351-6871

Home Page:
http://www.pima.gov/elections/

Campaign Finance Information and Reports:
http://www.pima.gov/elections/campaign_financial_main_page.htm
3.0 Software Support

3.1 Use to Client Software

Email CF Solutions at info@cfsaz.com if you are having difficulty with any of the following:
- Downloading and use of client software
- Installation
- Basic operation of software
- Printing Issues
- Software compatibility with desktop computer

Support Hours is 8:00 am to 5:00 pm Arizona time, Monday through Friday, excluding holidays

See CF Solutions at http://www.cfsaz.com/ for additional information

3.2 Committee Management

Email Pima County Elections department at Electionscf@pima.gov or call at (520) 351-6830 if you are having questions with any of the following:
- Electronic filing issues
- Creating New Committee within software
- Obtaining FilerID
- Obtaining a new username and password to file electronically
- Reset Password, forgotten username
- Website technical issues
- Website wrong data (name misspelling, etc)
- Issues, bugs, enhancements

3.3 County Cannot Provide Legal Advice

THE CAMPAIGN-RELATED FORMS, REPORTS, DISCLOSURE STATEMENTS AND INFORMATION ARE PROVIDED AS A SERVICE TO THE PUBLIC. PIMA COUNTY, THROUGH STAFF AND OFFICIALS, WILL NOT PROVIDE DIRECTION TO CANDIDATES, COMMITTEES OR THE PUBLIC ON THE INTERPRETATION OR PROPER COMPLETION OF ANY OF THE FORMS, DISCLOSURE STATEMENTS OR REPORTS. CANDIDATES AND COMMITTEES ARE ADVISED TO SEEK LEGAL COUNSEL REGARDING REPORTING AND DISCLOSURE REQUIREMENTS.

3.4 Direct link to the CFS2010AZ User Manual

For detailed instructions on how to use the desktop software, visit the following web site:
or go to the HELP menu within CFS2010AZ, and choose “Online Handbook”
4.0 Obtain Desktop Software

4.1 Download

Obtain the latest version of the software at the link above called “Campaign Finance Information and Reports”. Right-Click on “INSTALL - CAMPAIGN FINANCE SOFTWARE” and choose “Save Target As....” to download the installer. Depending on the Windows and Internet Browser you are running, the steps are slightly different.

Direct Link is: 
http://cfsaz.com/pimasoftware.htm

Clicking on the ACCEPT button will download the latest version of the application.

[Image of File Download - Security Warning]

Clicking on RUN will do an immediate install of the desktop software. Clicking on SAVE will allow you to download the application and install it later.

When you click RUN, you may be prompted with a Security Warning. Please click on RUN to start the installation process.
5.0 Install Software

Take the default settings when installing the software. See the software’s User Manual for details.

5.1 Start of the Installation Wizard.

Press “NEXT” to continue the installation wizard.

5.2 Read and accept the License Agreement

Click on “I Accept the agreement” and press “NEXT”
5.3 Important CFS 2008 upgrade information

5.4 Standard User Information

This information is only used for the installation of the software and is not related to the Committee Information.
5.5 **Select Destination Location**

Accept the default file location of `C:\Program Files\CF2010AZ`

![Select Destination Location dialog box](image)

5.6 **Start Menu Folder Name**

This will be where the name of hte menu item under the “Start” menu. Accept the default.

![Start Menu Folder Name dialog box](image)
5.7 Summary of Installation Choices

Click FINISH to exit the installation wizard.

5.8 Summary Screen

Click FINISH to exit the installation wizard.
6.0 Configure Desktop Software

This only has to be done once.

6.1 Run CFS2010AZ

When the software is installed on the computer, go to START menu and find the CF Solutions menu item and choose CFS2010AZ

6.2 Confirm configuration pointing to proper location

Menu item FILE, then PREFERENCES

Choose INTERNET tab and confirm the setting is http://electionfilings.pima.gov:8887
6.3 Confirm proper email address

Choose FILE / Properties.

Confirm that the email address is correct. This is used to send back a confirmation that your electronic submission has accepted or rejected.

When confirmed, click on FINISH to close the Committee Properties window.
7.0  Set Up Account to Allow Submission of Committee Financial Filings

7.1  Username and Password

To get a username and password to allow submission to Pima County’s website, contact the Pima County Elections department to get this information. See Section 2.0 for Elections contact information.

You will need to provide who you are and what your committee name is. The FilerID would be helpful. The filerID can be found at the top of the Properties form.

Click on the CANCEL or FINISH button to close the Committee Properties window.

8.0  Review Report Before Submission

8.1  Go to Reports

Under REPORTS, choose “Report for Filing”
8.2 Choose Reporting Period

Click on PREVIEW and click on OK to show the report.

8.3 Choose Run.

Click on PREVIEW and click on OK to show the report.
After reviewing the report, click the red X to close the window.

Note: Clicking on the disk icon allows you to save the report for saving, emailing or printing later.
9.0  File Financial Report Electronically to Pima County

9.1  Go to Reports

Under REPORTS, choose “Report for Filing”

9.2  Choose Reporting Period

9.3  Choose File Electronically
9.4 Enter Credentials

Enter your username and password that was supplied by the Elections Department.

Click on the OK button to continue.

9.5 Choose “Send Filing >>”

9.6 Check Status

Check the status and choose DONE to close the window.

9.6.1 Successful Example
9.6.2 Failure Example of: Invalid Due to Being Outside the Filings Period

![Image of Electronic Filing window with error message: You are currently 24 days past the due date for this filing period (2016)].

9.6.3 Failure Example for Invalid Username and/or Password:

![Image of Electronic Filing window with error message: Error processing your filing. Please verify your fileID, username and password.]

9.6.4 Failure Example For Username and/or Password Not Being Set Up By The Elections Department

For this situation, you need to contact Pima County Elections department to set up your account. See the 2.0 Pima County Elections Department section at the beginning of this document.
10.0 Email Notification

You will receive an email showing the acceptance or rejection of the submission.

10.1 Acceptance Email

Confirmation of Receipt of Campaign Finance Report: 111-1111

Electionc20@pima.gov to me

4:05 PM (2 minutes ago)

Thank you for submitting your report electronically to the Pima County Elections Department. This email is to confirm a successful submission.

If you have any questions or wish to see your report, please visit http://www.pima.gov/erecs/ and click on "CAMPAIGN FINANCIAL REPORTS LINK".
11.0 View Filing Online

Click on the link in your email. Or here: [http://electionfilings.pima.gov:8889](http://electionfilings.pima.gov:8889)

11.1 Welcome Page

Click on the Committee Information button to enter the site.

11.2 Search for your committee

Enter into the SEARCH box any part of your Committee Name or filerID and press “Apply”
11.3 View Filings

Choose the Filings link to view all the filings for the selected committee.

11.4 See the Filing Document

Click on the VIEW link to see the actual document.