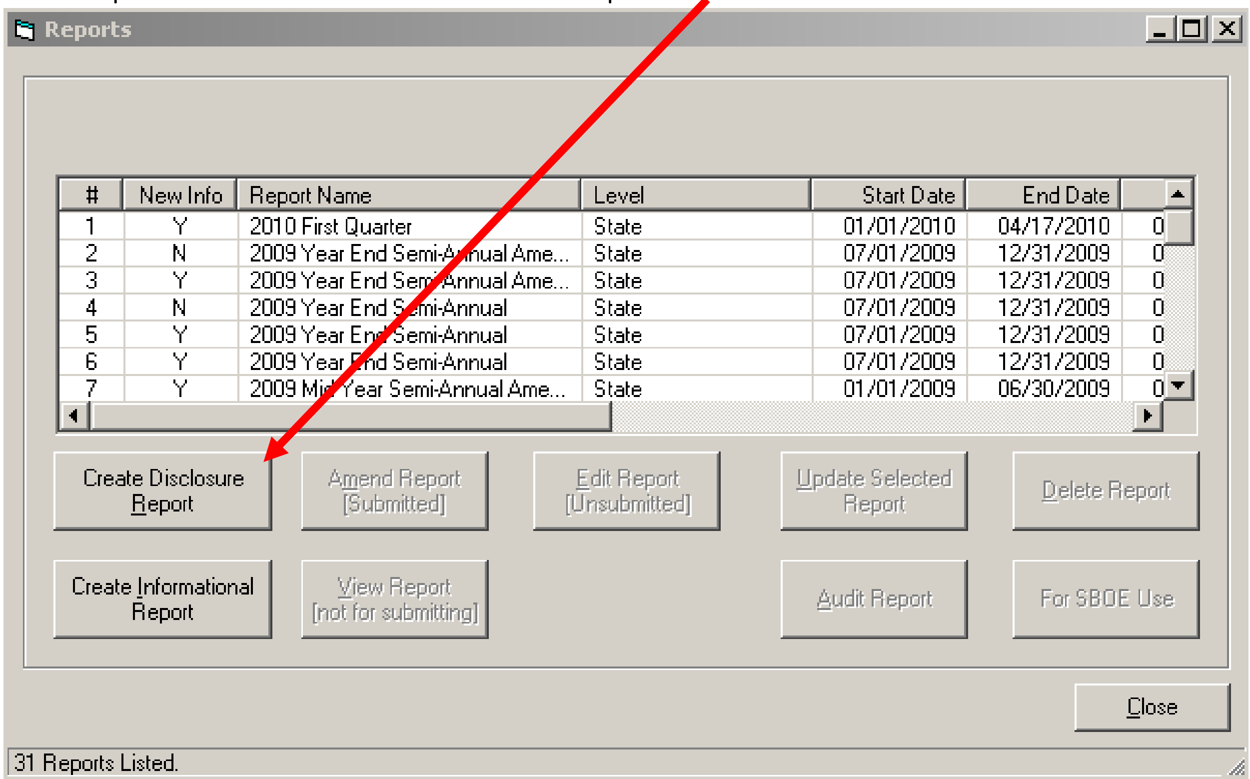
Create a Report

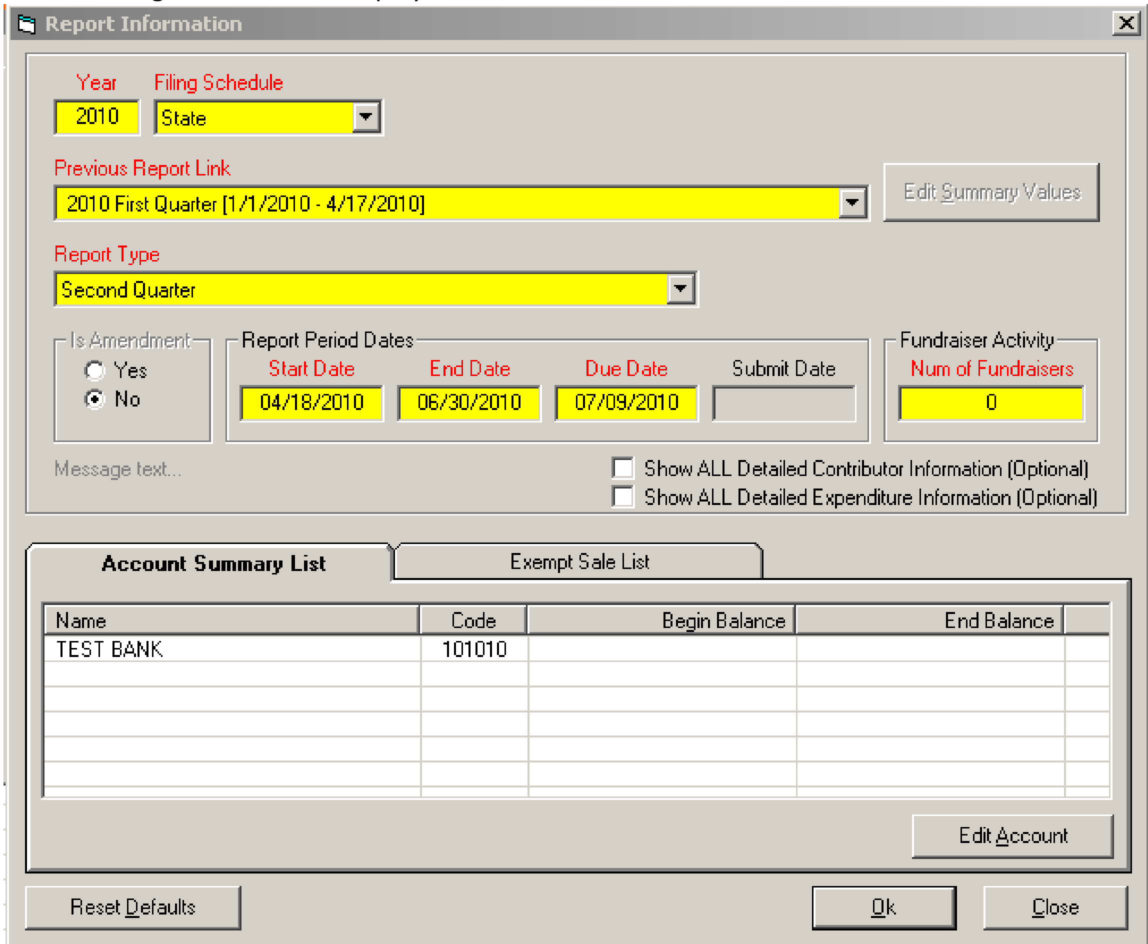
Once all contributions and expenses have been entered, and you are ready to create your report, follow the steps set out below.

Select Reporting→ Report Information.

At the Reports screen select “Create Disclosure Report.”



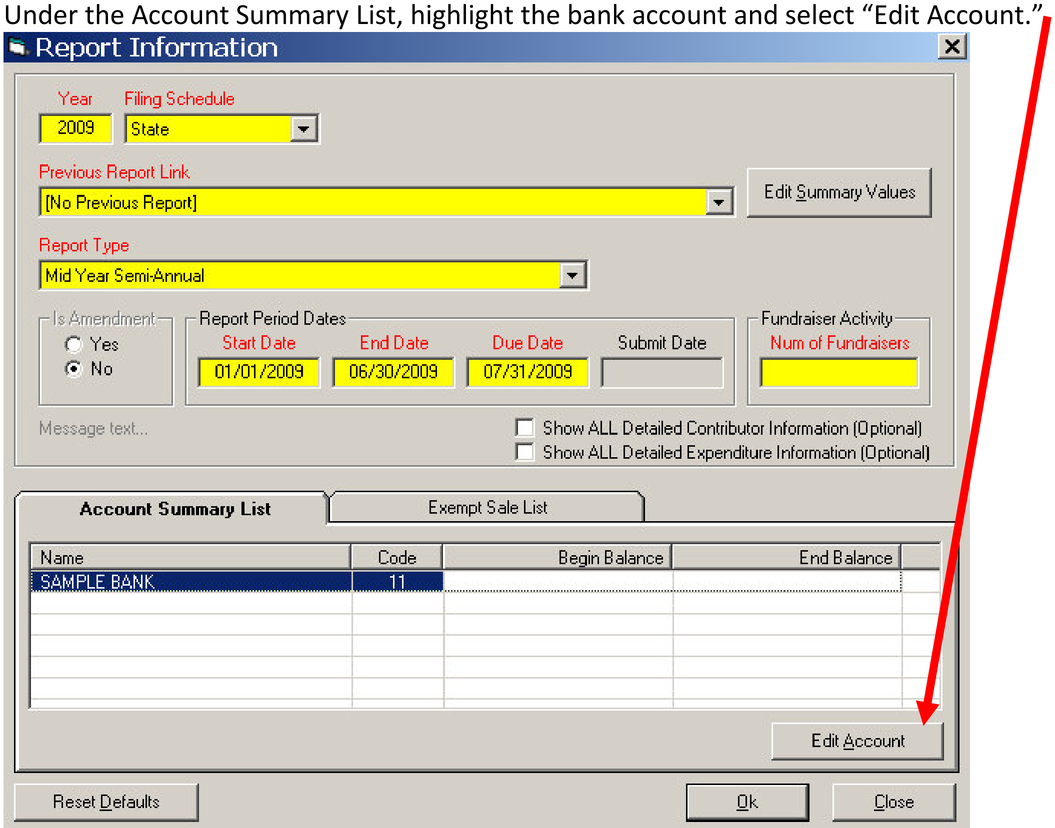
The following screen will be displayed:



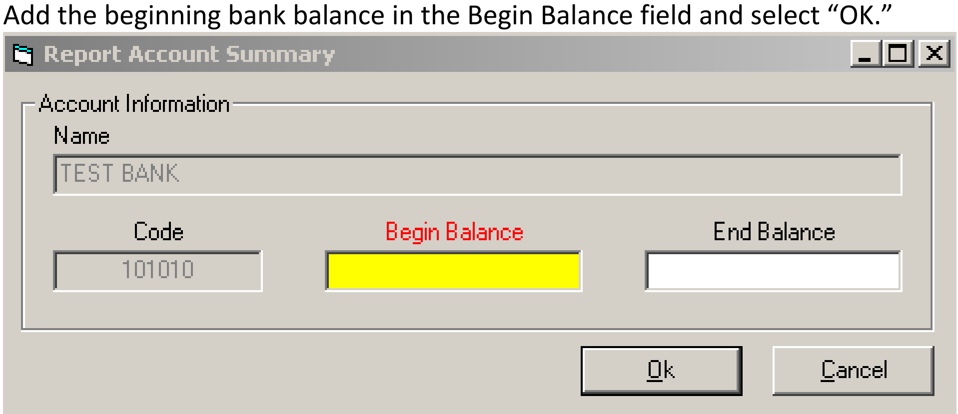
Complete all yellow fields as follows:

- **Year**: Enter the year of the report
- **Filing Schedule**: Select your filing schedule from the drop down list. All party committees, Council of State candidates, legislative candidates, judicial candidates and district attorney candidates should choose "State." All candidates for county-level offices should choose "County." All candidates for municipal-level offices should choose "Municipal." Candidates for offices in special districts, such as soil & water conservation districts, should choose "Municipal" if the office is ordinarily on the ballot in an odd-numbered year and "County" if the office is ordinarily on the ballot in an even-numbered year. Political action committees, referendum committees, and legal expense funds registered with the State Board of Elections should choose "State;" those registered with a county board of elections should choose "County."
- **Previous Report Link**: Use the drop down list and select the last report in the cycle. Remember, if you have amended the last report you must select the amendment.
- **Report Type**: Use the dropdown list to select the report type
- **Report Period Dates**: Once you have selected the report type the dates will automatically populate
- **Fundraiser Activity**: Enter the number of fundraisers held this reporting period

Under the Account Summary List, highlight the bank account and select “Edit Account.”

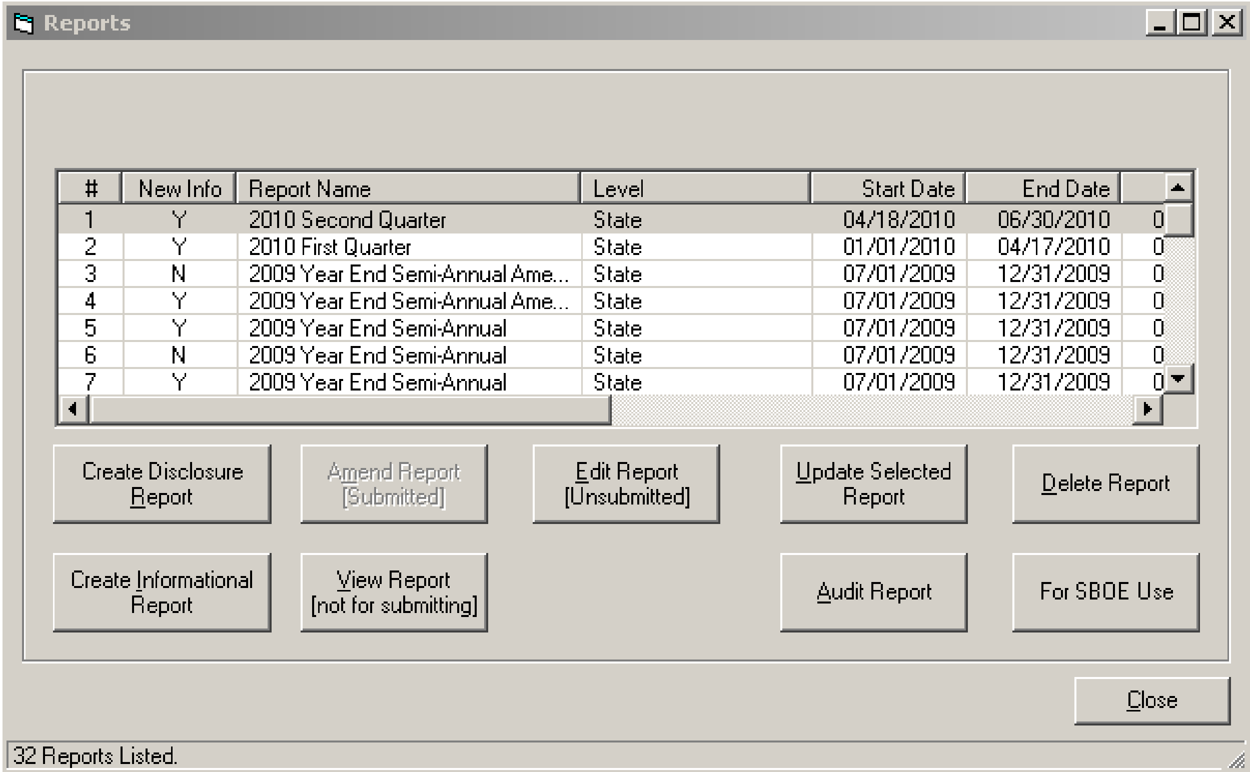


Add the beginning bank balance in the Begin Balance field and select “OK.”



Select “OK” once again on the Report Information screen.

You will now be back at the Reports screen, and you will see your report in that list:



You can now use the View Report (not for submitting) button to see the report. You should check the report to make sure all balances and totals are correct.

Next you should audit the report, which is covered in the topic Audit Report.

Your final step will be to save and send the report which is covered in the topic Save the Official Report.