



INTRODUCTION TO FECFILE

For PACs & Party Committees

The goal of today's presentation is to familiarize you with FECFile by providing you with a basic understanding of the program's fundamentals. You will learn how to effectively navigate the software, create reports, enter transactions, and provide all of the necessary information for your FEC filings.

Please remember if you have any questions at any time, do not hesitate to ask!

WORKSHOP OUTLINE

Part I: FECfile Basics (Getting Started Manual, p.2)

- A. Getting started with FECFile (Build 8.1.0.4)
 - Database layout
 - Tab names and purposes
 - Data location, importance of backups
 - Avoiding duplicate committee files
- B. Setting up your database
- C. Creating individual reports
 - Types of reports
 - Electronic filing password

Part II: Form 1 – Statement of Organization (p. 8)

- A. Treasurer Designation
 - Assistant Treasurer
- B. Affiliated Committees
 - Joint Fundraisers
- C. Bank Depositories
- D. Multiple Email Addresses
 - Amend Form 1 to update email address
- E. Changing Committee Address
- F. Report changes to registration information within 10 days

Part III: Reporting Receipts (p. 16)

- A. Summary page, types of receipts reported on Schedule A
 - Itemization Thresholds
 - "This P.I" (This Period Itemized) and "This P.U" (This Period Unitemized)
- B. Individual and candidate contributions
 - Creating a new contact vs. using existing contact
 - Partnership contributions (Introduction to transaction splits)
- C. In-kind contributions
 - Automatically creates corresponding entry on Schedule B
- D. PAC and political committee contributions
 - Using the PAC Look-Up function

Part IV: Reporting Disbursements (p. 22)

- A. Types of disbursements reported on Schedule B
 - Itemization Thresholds
- B. Operating expenditures
- C. Staff reimbursements/credit card payments
 - Transaction splits (Itemization)
- D. Contributions to other federal candidate committees

Part V: Providing Additional Information

- A. Miscellaneous Electronic Submission (Form 99)
- B. Memo Text on report, transactions
- C. Memo Text vs. Memo item

Part VI: Filing Reports (p. 28)

- A. Close
- B. Validate
- C. Preview, Print
- D. Upload
- E. Amend

HELPFUL LINKS

Electronic Filing Resources:

Help for Electronic Filers: manuals, tutorial videos, and links.

<http://www.fec.gov/support/index.shtml>

- User Manual: [Getting Started With FECFile \(For PAC and Party Committees\)](#)
- Electronic Filing Password: <http://www.fec.gov/electfil/passwords.shtml>
- FAQs about Electronic Filing: http://www.fec.gov/support/faq_filing.shtml
- FAQs about FECFile: http://www.fec.gov/support/faq_soft.shtml
- Validation Errors: http://www.fec.gov/support/faq_valid.shtml
- Upload Errors: http://www.fec.gov/support/faq_parser.shtml
- Common E-filing Mistakes: <http://www.fec.gov/electfil/mistakes.shtml>

FECFile Video Tutorials:

- [FECFile video tutorial: "Setting Up a FECFile Database for a Political Action Committee or Political Party Committee"](#)
- [FECFile video tutorial: "Entering Contributions from Individuals and PACs"](#)
- [FECFile video tutorial: "Entering Operating Expenditures and Contributions to Candidates"](#)

Online Webforms: <https://webforms.fec.gov/>

Reporting Resources:

Campaign Guidebooks: <http://www.fec.gov/info/publications.shtml#guides>

Reporting Dates: http://www.fec.gov/info/report_dates.shtml

Reports Analysis Division: <http://www.fec.gov/rad/>

FAQs Page: <http://www.fec.gov/ans/answers.shtml>

- FAQs for PACs:
<http://www.fec.gov/rad/pacs/FederalElectionCommission-RAD-PACs.shtml>
- FAQs for Party Committees:
<http://www.fec.gov/rad/parties/FederalElectionCommission-RAD-Parties.shtml>