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I. INTRODUCTION

The Virginia Department of Elections (ELECT) has developed a new campaign finance electronic report creation and filing application known as COMET (Committee Electronic Tracking System), which enables candidates and committees to report their finances and to electronically file (e-file) required disclosure reports. There is no cost for using COMET.

This new software allows committees to easily submit their expenses, receipts, loans and debt information for quick and easy report filing with the click of just a few buttons.

Candidates and political committees do have the option to contact one of the vendors whose products have been certified by the Department of Elections (ELECT) to meet Elect’s requirements. A list of approved vendors can be found by visiting our website:

II. GETTING STARTED

COMET is a web application which can be retrieved on any computer with access to the Internet. To begin, go to this website: https://cf.sbe.virginia.gov

A. Establishing a Account and a Profile

Once you click the link to the Web site, the application will prompt you to establish your logon credentials by clicking on the Register Here link.

![Log On](image)

**NOTE: Passwords are required to have at least 1 number, 1 upper case character, and contain 8 or more characters.**

You will now be in a screen to “Create a New Account” by entering your e-mail address, and a password.

![Create a New Account](image)
You must also copy the verification words from the picture as instructed on the form. Once you click on the Register button, the application will prompt you with a “Register Success” screen.

Once you are registered, you will receive an email with a link to the log on screen. Enter your credentials where provided. Click on the link in the email to login and activate your account. If you do not receive an email within 15 minutes, try registering again.

You must enter Profile (Contact) information (shown below) before you can use the system. Required fields are indicated by asterisk.

After clicking the “Save” button, you will see the “Home” screen (below).
B. Creating a Statement of Organization

See below for an explanation of each type of committee:

1. **Candidate Campaign Committee**
   
   The committee designated by a candidate to receive all contributions and make all expenditures for them or on their behalf in connection with their nomination or election. A Candidate’s Campaign Committee may not be established for multiple candidates.

2. **Federal Political Action Committee**
   
   Any political action committee registered with the Federal Election Commission that makes contributions to candidates or political committees registered in Virginia.

3. **Inaugural Committee**
   
   Any organization, person or group of persons that anticipate receiving contributions or making expenditures, from other than publicly appropriated funds, for the inauguration of the Governor, Lieutenant Governor, or Attorney General.

4. **Out of State Political Committee**
   
   Means an entity subject to § 527 of the United States Internal Revenue Code that is not registered as a political committee or candidate campaign committee in Virginia and whose contributions made to political committees and candidate campaign committees registered in Virginia is 50% or more of the committee's expenditures made in the form of contributions. The term does not include federal political action committees.

5. **Political Action Committee**
   
   Any organization, person, or group of persons, established or maintained in whole or in part to receive and expend contributions for the purpose of influencing the outcome of any election. The term shall not include a campaign committee, federal political action committee, out-of-state political committee, political party committee, referendum committee, or inaugural committee.

6. **Political Party Committee**
   
   Any state political party committee, congressional district political party committee, political party committee for a county or city, other election district political party committee, political party committee for a county or city, other election district political party committee, organized political party group of elected officials, which anticipates receiving contributions or making expenditures in whole or in part, for the purpose of influencing the outcome of an election. **NOTE:** Only Republican or Democratic Parties are eligible for this type. All other political parties must file as a Political Action Committee (PAC).
7. **Referendum Committee**

Any organization, person, group of persons, or committee that makes expenditures to advocate the passage or defeat of a referendum legally placed on the ballot.

Click on the appropriate type of committee from the “File a Statement of Organization” list to open the form. When the Statement of Organization form is open, click “Click to Open” to view instructions for filling out the form.
As you fill out the form, you can save a draft even before you complete your entries (see below). Click “Save as Draft”, then click the “Save” button. It is recommended that you save your work often. The Server will log you off after 30 minutes whether you are active in the system or not. The best way to reset the timer is to save the form.

After clicking the Save button, the document will save and redisplay in read-only format. The following options will be available:

- “Edit” to change the format to edit to continue working on your Statement.
- “Download Draft Printable PDF” to open the document as a .PDF printable report with “Draft” watermark on some pages.
- “Home” to return to Home Page
- “About” for General Site information
- “FAQs” to see list of Frequently Asked Questions

Once the form is complete; it is necessary to submit the Statement of Organization for review by the Department of Elections Campaign Finance Section. Once a Statement of
Organization is submitted, it cannot be changed until the Department of Elections accepts or rejects it. A committee cannot enter transactions or file campaign finance reports until the Statement has been accepted.

To submit the Statement, open the Statement in Edit format, check “Submit Statement of Organization” option. Then click the “Save” button at the bottom of the form to submit the form for acceptance.

After clicking the Save button, you will have the option to open the document as a .PDF printable report. Click “Download Printable PDF” button to review, print and sign the final version of the form, as required for acceptance (see note below).

Note: A signed copy of the printed Statement of Organization must be mailed to the Department of Elections (if a candidate for statewide office), to the Department of Elections and the local electoral board of the county or city of the candidate’s residence (if a candidate for the General Assembly) or to the local electoral board for any local candidates. These entities must be in receipt of your Statement of Organization before your Statement will be “accepted”.

When you click “Home”, a message will display the filing status of the committee you established (below).
Once the Statement of Organization is “accepted”:

1. All committee members will receive email notifications of the:
   a. Statement of Organization was accepted;
   b. Report schedule for the current year

2. The Home page will display more options as discussed below.

COMET allows you to add as many committees as needed. Once you have created one committee’s Statement of Organization, the list of committee types will remain on the left part of the screen. Click on the appropriate committee type if you need to register additional committees.

You may also add other registered users to your committee or request other committees add you as a user in order to allow multiple users to view, update, manage your committee information. See Section IV for more information.
III. Users and Profile Updates

COMET allows for the creation of multiple “Users” for each Statement of Organization. This allows multiple users to be working on the same committee as needed. To grant additional users to the Statement of Organization, click on the name of the appropriate committee from the Home screen and then click “Users” from the red navigation bar at the top of the screen:

The page will show you a current list of active users on the account. To add additional users to the account, click on “Add New User”.

To add a user, the individual must first register (see section II). Simply type in the person’s email address into the field provided.

If the “IsAdmin” option is checked, the user will be granted authority to all functionality of the committee (create, save, submit, and amend the Statement of Organization, enter contacts, users, receipts, loans, debts, expenditures, prepare and file reports). Without the “IsAdmin” option checked for a given individual, they will have limited authority (create, edit, and save the Statement of Organization, enter contacts, receipts, loans, debts, expenditures, prepare reports, but not submit reports or Statements of Organization).

**NOTE:** ELECT strongly recommends that each committee have at least two Admin users to ensure there is a backup that can submit the report in case the primary filer is unable.

To change a user’s access, from the Home page, click the “Users” button to return to the list of users for the given Committee’s Statement of Organization. Select or Deselect the “IsAdmin” option as appropriate.

To change a user’s email address, they must register with the new address and be added as a user. Deleting users here will not affect their registered account.

**Updating and Managing Your Profile**

COMET allows you to update your contact information. However, you cannot change your email address. If you need to update your email address, register with the new email address and have each committee create a user with your new email address.
To update your profile, click on “Profile” at the top right of the screen, then click on Edit and make the necessary changes in the fields provided and click “Save” to save the changes.
IV. Line-Item Entry

COMET has simplified the entry of required reportable campaign finance transactions. While the reports still separate transactions into different schedules, COMET allows for data entry to be easily completed by any user whether they are old pros or newcomers to campaign finance reporting.

There are three types of transactions to choose from in COMET: Receipts, Expenditures, and Loans/Debts. Below we will discuss the line-item entry for each transaction type in COMET.

When saving line item receipts, COMET provides the option to “Save” or “Save and New”. When “Save” is selected, the previous page will be displayed after the data on the current page is saved. When “Save and New” is selected, data on the page will be saved and the same page will be redisplayed with fields cleared for entry of the next set of data. “Save and New” feature is advantageous in the case where many line items of the same type need to be entered at once by eliminating the need to re-navigate back to the same page and reducing clicks.

COMET provides a page size option when displaying the list of receipts, loans/debts, and expenditures. Depending on the number of records in your system, page size can be changed in increments of 10. The setting will remain in effect as long as you are logged into your browser. Keep in mind that pages will load slower as more data must be displayed.

To change the page size:

- Click on any of the line item types (Expenditures, Loans / Debts, Receipts)
- Select any of the page size options

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Source</th>
<th>Details</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/19/2012</td>
<td>Cash Contribution</td>
<td>Jones Advertising</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td>07/19/2012</td>
<td>Cash Contribution</td>
<td>Jones Advertising</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td>07/17/2012</td>
<td>Cash Contribution</td>
<td>Johnson &amp; Johnson</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td>07/15/2012</td>
<td>Cash Contribution</td>
<td>Johnson, Mark</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td>07/05/2012</td>
<td>Cash Contribution</td>
<td>Jones Advertising</td>
<td>View Large Contribution Report</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>07/03/2012</td>
<td>Cash Contribution</td>
<td>Smith &amp; Co.</td>
<td>View Large Contribution Report</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>07/03/2012</td>
<td>Cash Contribution</td>
<td>Smithson, Tom</td>
<td>View Large Contribution Report</td>
<td>$3,500.00</td>
</tr>
<tr>
<td>07/02/2012</td>
<td>Cash Contribution</td>
<td>Johnson, Mark</td>
<td></td>
<td>$12,000.00</td>
</tr>
<tr>
<td>06/30/2012</td>
<td>Cash Contribution</td>
<td>Jones, Brenda</td>
<td>View Large Contribution Report</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>06/22/2012</td>
<td>Cash Contribution</td>
<td>Jones Advertising</td>
<td>This is an automatic entry to</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

A. Receipts

Receipts are transactions which add money or benefit the committee in some way. There are three different types of receipts:

Cash Contributions

Cash contributions are direct contributions to your committee. They can be in the form of cash, check, credit card or even a PayPal account. Cash Contributions will appear on
Schedule A of the report where they meet the over $100 contribution threshold (itemized contribution).

In-Kind Contributions
In-Kind contributions are gifts of goods or services to the committee (e.g. the gift of a computer for filing campaign finance reports is an in-kind contribution). In-Kind Contributions will appear on Schedule B of the report where they meet the over $100 contribution threshold (itemized contribution).

Refund, Rebate or Interest
Sometimes referred to as “other receipts”, these are monies earned from interest on the committee’s account, a refunded expenditure, or a rebate on a purchased item. Refund, Rebate or Interest will appear on Schedule C of the report.

Adding New Receipts
To enter receipts click on the “Receipts” button in the red navigation bar at the top of your Home screen (or in the yellow boxes below your committee from the Home screen). Click on “Add a New Receipt” (see below) to establish a new receipt record.

When creating a receipt, you will have the option to check the box for a “Cash Contribution, In-Kind Contribution, or Refund, Rebate or Interest”. As you click through the different receipt types, the required fields for each will change based on the type of contribution. As you click between “Source” types (Individual or Corporate), you will notice that the required information changes based on the type.

Be sure to enter information required (as noted by the red asterisk) and click “Save” once you are finished. If you click out of this screen before saving, the information entered will be lost.

The fields displayed with blue asterisks are required if the contribution for the contributor exceeds $100 for the period.
NOTE: The memo field is for committee reporting only. That information will not be reported publicly and will not be visible to anyone who is not listed as a committee user.

Searching Receipts

From the “Receipts” home page, you can click on the “Search Receipts” bar to search previously entered receipts. Searching can be done on any part of the name or by date entered.

Click on the column headings in the list to sort receipts by Date, Type, Source, and Amount.
**Editing and Deleting Receipts**

There are two icons next to the Amount field (illustrated above). Scrolling your mouse over the icons will bring up a box which describes what action is completed by clicking on the icons. Clicking on the red “X” icon (above) will display a screen to confirm deleting the receipt (Figure A). Clicking on the icon with a pencil (above) will open the screen to allow you to edit the receipt (Figure B).

Figure A:

![Delete Receipt](image1.png)

**NOTE:** You cannot edit the Source/Contact information from the edit screens. You must click on “Contacts” from the red navigation bar to make edits to individuals or corporations.

**B. Expenditures**

Expenditures are monies that the committee spent in some manner. There are four different types of expenditures:

**Expense**
An expense is the most common type of expenditure and is used to report any expenditure which does not fit in any of the other three categories. Expenses are listed on Schedule D of the report.

**Debt Payment**
A debt payment is any payment made to a debt incurred by the committee. If the debt payment is made to reduce or pay off a loan, then it is reported on Schedule E of the report. If the debt payment is to make a payment on any other type of debt, it is listed on Schedule D of the report. The amount owed on the debt is reported on Schedule F.

**Loan Payment**
A loan payment is any payment made to pay off a loan to the committee. Loan payments are listed on Schedule E of the report.

**Surplus**
A surplus expenditure is only used when a committee is disbursing its surplus funds just before filing a final report. There are statutory limitations for disbursing surplus funds. Surplus is only reported on Schedule I of the committee’s final report.

**Entering New Expenditures**
To enter expenditures click on the “Expenditures” button in the red navigation bar at the top of your screen (or in the yellow boxes below your committee from the Home screen).

Click on “Add a New Expenditure” (see below) to establish a new record.

When creating an expenditure, you will have the option to check the box for a “Debt Payment; Expense; Loan Payment; and Surplus”. The default type is “Expense”. As you click through the different expenditure types, the required fields for each will change. As you click between the “Source” types (Individual or Corporate), you will notice that the required information changes based upon the type.

When saving line item expenditures, COMET provides the option to “Save” or “Save and New”. When “Save” is selected, the previous page will be displayed after the data on the current page is saved. When “Save and New” is selected, data on the page will be saved and the same page will be redisplayed with fields cleared for entry of the next set of data. “Save and New” feature is advantageous in the case where many line items of the same type need to be entered at once by eliminating the need to re-navigate back to the same page and reducing clicks.

Be sure to enter information required (as noted by the red asterisk) and click “Save and Return” or “Save and New” once you are finished. If you click out of this screen before saving, then the information entered will be lost.

**Searching Expenditures**
From the Expenditures home page, you can click on the “Search Expenditures” bar to search previously entered expenditures. Searching can be done on any part of the name or by date entered.
Click on column headings of the list to sort receipts by Date, Type, Source, and Amount.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Payee</th>
<th>Details</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/10/2012</td>
<td>Loan Payment</td>
<td>Burns, Montgomery</td>
<td>Loan: 03/09/12 Burns, Montgomery C. For: $5000.00 Paid: $5...</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>03/09/2012</td>
<td>Loan Payment</td>
<td>Burns, Montgomery</td>
<td>Loan: 03/09/12 Burns, Montgomery C. For: $5000.00 Paid: $5...</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>02/29/2012</td>
<td>Loan Payment</td>
<td>Fidelity Loans</td>
<td>Loan: 01/02/12 Fidelity Loans For: $5000.00 Paid: $600.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>02/20/2012</td>
<td>Expense</td>
<td>Redford, Lynn</td>
<td>Authorized By: Fred Services</td>
<td>$45.00</td>
</tr>
<tr>
<td>02/15/2012</td>
<td>Expense</td>
<td>Redford, Lynn</td>
<td>Authorized By: Joe Rovers</td>
<td>$55.00</td>
</tr>
<tr>
<td>02/13/2012</td>
<td>Loan Payment</td>
<td>Fidelity Loans</td>
<td>Loan: 01/02/12 Fidelity Loans For: $5000.00 Paid: $600.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>02/12/2012</td>
<td>Expense</td>
<td>Redford, Lynn</td>
<td>Authorized By: Fred Test</td>
<td>$110.00</td>
</tr>
<tr>
<td>02/08/2012</td>
<td>Expense</td>
<td>Redford, Lynn</td>
<td>Authorized By: Fred Stuff</td>
<td>$40.00</td>
</tr>
<tr>
<td>02/05/2012</td>
<td>Expense</td>
<td>Home Depot</td>
<td>Authorized By: Fred Merchandise</td>
<td>$450.00</td>
</tr>
<tr>
<td>01/17/2012</td>
<td>Expense</td>
<td>Redford, Lynn</td>
<td>Authorized By: Fred Test</td>
<td>$23.00</td>
</tr>
</tbody>
</table>

**Deleting and Editing Expenditures**

There are two icons next to the Amount field. Scrolling your mouse over the icons will bring up a box which describes what action is completed by clicking on the icons. Clicking on the red “X” icon (above) will open the page to confirm deletion of the expenditure (Figure C). Clicking on the icon with a pencil (above) will open the page to allow you to edit the expenditure (Figure D).

**Figure C**

**Figure D**
NOTE: You cannot edit the Source/Contact information from the edit screens. You must click on “Contacts” from the red navigation bar to make edits to individuals or corporations.

C. Loans/Debts

A loan is money received by the committee which it intends to pay back. Loans are first reported on Schedule E. Upon receiving a loan, the committee owes a debt and must report it on Schedule F until the loan is fully repaid. A debt can also be a service received for which the committee has not yet paid. All debts are reported on Schedule F until they are repaid (which is then reported on Schedule D).

Entering New Loans/Debts

To enter expenditures, click on the “Loans/Debts” button in the red navigation bar at the top of your screen (or in the yellow boxes below your committee’s name from the Home screen).

Click on “Add a New Loan/Debt” (see below) to establish a new record.

When creating Loan or a Debt, you will have the option to check the box for a “Loan” or “Debt”. The default type is “Loan”. As you click through the different types, the required fields for each will change. As you click between the “Lender/Debtholder” types (Individual or Corporate), you will notice that the required information changes based upon type.

When saving line item loans/debts, COMET provides the option to “Save” or “Save and New”. When “Save” is selected, the previous page will be displayed after the data on the current page is saved. When “Save and New” is selected, data on the page will be saved and the same page will be redisplayed with fields cleared for entry of the next set of data.
“Save and New” feature is advantageous in the case where many line items of the same type need to be entered at once by eliminating the need to re-navigate back to the same page and reducing clicks.

Be sure to enter information required (as noted by the red asterisk) and click “Save and Return” or “Save and New” once you are finished. If you click out of this screen before saving, then the information entered will be lost. Note that there is an area to enter the Co-Borrower as well.

**Repaying Loans/Debts**

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Lender</th>
<th>Co-Borrower</th>
<th>Details</th>
<th>Amount</th>
<th>Total Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/06/2012</td>
<td>Loan</td>
<td>Johnson, Tom</td>
<td></td>
<td></td>
<td>$500.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>01/23/2012</td>
<td>Loan</td>
<td>Moneybags, McGee</td>
<td></td>
<td></td>
<td>$5,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>01/11/2012</td>
<td>Loan</td>
<td>Barns, Montgomery C.</td>
<td></td>
<td></td>
<td>$5,000.00</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>12/03/2011</td>
<td>Loan</td>
<td>Wells Fargo</td>
<td></td>
<td></td>
<td>$5,000.00</td>
<td>$5,000.00</td>
</tr>
</tbody>
</table>

After entering a new loan/debt, you will notice on the Loans/Debts home screen a money stack icon (above). To make a repayment on a loan, click that icon.

**NOTE:** You can also access loan repayments through the Expenditures home screen by clicking “Add a New Expenditure” and choosing “Loan Payment”. A drop-down box will appear allowing you to choose the loan on which you wish to make a payment. Enter the date and amount to be repaid and click “save”.

**Forgiving a Loan/Debt**

There may be times when the committee cannot repay its obligation and the lender decides to “forgive” the debt. In this case, the law requires that the forgiven portion of the loan be reported as both a contribution on Schedule **A** and a loan repayment on Schedule **E** (debt payments are only reported on Schedule D).

To forgive a loan in COMET, open the loan to be forgiven from the Expenditures Home
Screen and click the “Forgive This Loan” button. This will create the appropriate records as required by law in the amount of the loan balance.

Searching Loans/Debts

From the Loans/Debts home page, click on the “Search Loans/Debts” bar to search previously entered loan/debt. Searching can be done on any part of the name or by date entered.

Further, you can click on the headings in the graph to sort receipts by Date, Type, Source, Amount and Total Paid.
V. Large Dollar and Large Pre-Election Contributions

Political committees, not candidate committees, will always be prompted by COMET to file large dollar contributions. Skip to the next section named Filing Large Contribution Reports Prior to General Election for all Committees for details.

When large dollar and pre-election contributions are submitted in COMET, a message will display to prompt the committee to file a large contribution report with the following exception. Large Pre-Election contributions to Candidate Committees based on nominating events or primary dates of an election or any other requirement to file large pre-election reports other than based on election date must be submitted by the committee without a prompt from COMET.

Filing Large Contribution Reports Prior to Nominating Event and/or Primary date

A receipt that matches large pre-election contributions reporting requirements but not within an election date, will display a link once the receipt is saved named “Create Large Contribution Report”. It is the committee’s responsibility to understand whether the timing requires the filing of a large pre-election contribution based on the timing with regards to Nominating Events and/or primary elections.

1. Create the receipt and save it.

2. Open the receipt to be submitted as a large contribution report.

3. Click on “Create Large Contribution Report” if the contribution is required to be filed as a large pre-election report.
4. Click on “Large Contribution Report” to view the prepared report prior to submitting it.

If the report has been prepared but not submitted, you can remove the prepared, unsubmitted report by saving the receipt. The status line will change back to the following:

5. Click the link in the text “This record has an unsubmitted Large Contribution Report” link to open the page to review and submit the report to the Department of Elections.

6. To submit the report, check the “I declare…” statement and click “Submit Report”.

7. The large contribution report will be filed and displayed on the public website with the next report upload.
Filing Large Contribution Reports Prior to General Election for all Committees

Whenever a receipt (cash or in-kind) or loan is entered in COMET that meets the conditions of large (dollar or pre-election) contributions and does not meet the exception described above, COMET will display a message in the details of the line item entry screen to indicate the entry should be filed as a large contribution, as in the example below.

To file the report,

1. Click “View Report”
   (1) From the next page, you will see the report that is ready to be submitted.

2. When the report is ready to be submitted, check the box in the Statement of Treasurer section which affirms that report is true, correct and complete to the best of the filer’s knowledge.

3. Click “Submit Report”

The page will be redisplayed with a confirmation message of the date/time the report was submitted and name of the person who submitted the report. (See example below).

An email will be sent to the committee members and the filer to confirm receipt of the report by the Department of Elections. If the report is filed late, additional messages will be emailed to inform committee members of penalties, details as to why, and outstanding amounts owed (if others).

To return to add more line items, click the applicable buttons, in red.
To view the large contribution reports that have been filed, click the “Large Contribution Reports” button.
To amend a large contribution report:

1. Select the line item by which the large contribution report was triggered.
   a. Click “Large Contribution Reports” button
   b. Locate the large contribution report and click “View”
   c. From the view of the submitted report, click “Receipt”
2. Make the necessary change(s) to the line item entry.
3. Click Save.
4. From the resulting page, click “View” in the “Related Reports” section by the latest Amendment (see example page below):

The page will display the large contribution report, including the Amendment Count and the “Amended filing” flag will be checked.

Follow the same steps as taken to file an original report (see steps previous).

If a line item entry is submitted as a large contribution and then the line item is later deleted, the system will treat the change as an amendment of a large contribution report and it must be filed to maintain compliance. These types of reports will display a message that the information was deleted since originally filed as a large contribution.

If a line item entry is submitted as a large contribution and then changes are made to the line item that eliminates it as meeting large contribution conditions, it will still be treated as a large contribution. Consequently, the change will need to be submitted as an amended large contribution report.
VI. Managing Contacts

COMET maintains all of your contacts in one location. From your Contacts home screen, you can search and locate every individual and company which has given your committee a contribution or to which you have expended money. Further, you can add contacts to your committee’s record for quick finding at a later date.

To access your Contacts home screen, click on “Contacts” in the red navigation bar (or the yellow box underneath the committee’s name from your Home screen).

From the Contacts home screen, you can search, edit and view contacts in the same way as you have done for your line-item entries. But the Contacts home screen also allows you to click on a new icon titled, “View Contact Details”.

When you click on a Contact’s details you are taken to a screen which allows you to perform multiple tasks on one contact. Click on “Edit Contact” to make changes to the contact’s record such as address or occupation. You also have the option of deleting the contact.

**NOTE:** Deleting a contact will delete ALL transactions related to that contact and may therefore require amendments to be filed.

The contact details page also allows you to add transactions for the contact. Finally, you can click on the transaction type tabs to see a listing of each transaction entered for that contact (you’ll also notice that you can edit those transactions from this screen as well).
VII. Preparing and Submitting Your Report – E-Filers

For committees that indicated reports would be reported through e-filing in COMET, Reports are automatically generated from the receipts, expenditures, loans, and debts entered into COMET. There are 3 steps to filing a report:

1. Select the Reporting Period.

From the Home Page, click “Reporting” with the appropriate Statement of Organization. The report schedule will display for the Committee. Click “File” to start the process.

Step 1: Select Reporting Period

![Scheduled Reports Table]

Step 2: Prepare Report for Review

If this is the Final Report, check “Is Final Report”.

NOTE: A Final Report indicates that the committee is disbanding and does not intend to file campaign finance reports in the future. Campaign committees must file a final report with an ending balance of “$0.00” and repay all debts. Political committees may be able to file final reports with cash on hand assuming certain criteria are met. Please contact the Department of Elections if you have any questions.

If there is no activity to report for the period, check “No Activity”. The report will be prepared with no line items even if there are any for the given reporting period.
If this is the first report for your committee in COMET, click Baseline Finances on the page to enter existing amounts to be used in Schedules G & H and click “Save”.

When all options are selected and ready, click “Prepare Report for Review”. This will create a draft version of the report which can be reviewed prior to submitting to the Department of Elections.
A message will display to indicate the report is being prepared. This should just take a few minutes, depending upon the size of the report.

The date and time the report was requested will display in the “Report Requested” column.
When the report has been prepared, the “Report Prepared” column will display the date and time of completion. Note the “Submitted Date” column explains that the report has not been submitted at this time.

Click “Review and Submit” to see the report that was generated and to subsequently have the option to Submit the report to the Department of Elections.

**Step 3: Review Prepared Report and File**

The report is displayed below starting with the “Report” header information. Click any
of the yellow button letters to view the information on each schedule, as labeled.
Review the Schedule A and B Contact Statistics section to insure the contact information entered is above the 80% minimum compliance requirement. Contact information that is missing information in the “Blue Asterisked” fields of a contact record would not be counted as a complete entry.

To update records which are incomplete click on Schedule A or B. The form will highlight which records are incomplete. To edit these contacts, you may click “Contacts” in the red navigation bar, search for the contact and click the “Edit Contact Details” icon. Or simply click on the contact’s name in the report and you will go directly to the contact’s record where you can make edits.

NOTE: If any changes are made to contacts, line-item entries—whether added, updated or deleted, a new report must be prepared again in order for the changes to be included in the report.

You can change the un-itemized reporting figures on Schedule G at this point.

1. Click “G” button
2. Click “Edit Unitemized”
3. The “Schedule G: Edit Unitemized” page will display:

```
<table>
<thead>
<tr>
<th>Change Unitemized Contributions</th>
<th>Report</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E-1</th>
<th>E-2</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unitemized Count</td>
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<tr>
<td>Unitemized In-Kind Count</td>
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</tr>
</tbody>
</table>
```

4. Make applicable changes and click “Save”
5. Schedules G and H will be updated accordingly

**NOTE:** When a report is amended, you will have to prepare the report again and go back to Schedule G edit function to re-enter the un-itemized data. It will not be saved for amendments. Likewise, these fields cannot be changed once a report is filed unless the report is amended.

Check the “I declare…” statement in the Statement of Treasurer section to confirm that you have read the agreement. Until this is checked, you will not be able to submit the report.

If the report is not ready, the prepared report does not have to be submitted or filed. You can enter or update any line-item entries as needed and prepare the report as many times as needed prior to submitting the final report.

**NOTE:** If any changes are made to contacts, line-item entries-whether added, updated or deleted, a new report must be prepared again in order for the changes to be included.
If the report is ready to be submitted, click the “Submit Report” button at the bottom of this page. The Submitted Date column will be updated on page 2.

Once a report is submitted, the Report Schedule on Step 1 will reflect it. You can click “View or Amend Report” to see the submitted report or elect to Amend the submitted report. If you prepare another report after a report has been submitted, the system will automatically handle the amendment numbering process. A report may be amended as often as necessary.
VIII. Time Outs

The Server on which this software runs will automatically log you off (time out) after 30 minutes if it does not detect “server” activity. The safest course to take so that data is not lost is to be sure to save your work often. Should the server time out while you are logged in, you will be prompted with the following screen to log back in.

IX. APPROVED VENDORS UPLOADING
COMET allows for the uploading of Approved vendor software that generates .xml files which conform to specifications established by the agency. ELECT will accept e-filed campaign finance reports generated by vendor’s software and submitted by candidates and committees registered with ELECT.

To be set up as an Approved Vendor filer, your Statement of Organization will need to state that your committee is using an Approved Vendor under the “Filing Type” section and choose the vendor which you are using.

To upload an .XML file, the user needs to log into COMET, then from the Home Page click “Reporting” under the appropriate committee. The report schedule will display for the Committee.

Reports are automatically generated from the receipts, expenditures, loans, and debts entered into COMET. There are 3 steps to filing a report:

1. Select the Reporting Period.

**Step 1: Select Reporting Period**

Click “File” to start the process

![Reporting for Test Ref (RC-12-00041)](image)

Step 2: Prepare Report for Review

Click the “Browse” button. Locate the appropriate .xml file on your computer for the report you are trying to upload. Then click the yellow button “Upload Selected File”.
When the report is uploaded, the “File Uploaded” message will display. Click “Review” to see the report that was generated.

**Step 3: Review Prepared Report and File**

The report is displayed below starting with the “Report” header information. Click any of the yellow button letters to view the information on each schedule, as labeled. Review the Schedule A and B Contact Statistics section to insure the contact information entered is above the 80% minimum compliance requirement. Contact information that is missing information in the “Blue Asterisked” fields of a contact record would not be counted as a complete entry.
To update records which are incomplete click on Schedule A or B. The form will highlight which records are incomplete. To edit these contacts, you must make changes to the data in your vendor software, recreate the .xml file and upload the data again.

**NOTE:** If any changes are made to contacts, line-item entries—whether added, updated or deleted, a new report must be prepared again in order for the changes to be included in the report.

Check the “I declare…” statement in the Statement of Treasurer section to confirm that you have read the agreement. Until this is checked, you will not be able to submit the report.

**NOTE:** If any changes are made to contacts, line-item entries—whether added, updated or deleted, a new report must be prepared again in order for the changes to be included in the report.

If the report is not ready, the prepared report does not have to be submitted or filed. You can enter or update any line-item entries as needed and prepare the report as many times as needed prior to submitting the final report.

**NOTE:** If any changes are made to contacts, line-item entries—whether added, updated or deleted, a new report must be prepared again in order for the changes to be included in the report.

If the report is ready to be submitted, click the “Submit Report” button at the bottom of this page. The Submitted Date column will be updated on page 2.
Once a report is submitted, the Report Schedule on Step 1 will reflect it. You can click “View or Amend Report” to see the submitted report or elect to Amend the submitted report. If you prepare another report after a report has been submitted, the system will automatically handle the amendment numbering process. A report may be amended as often as necessary.
X. Exporting Line Items to Excel

COMET provides functionality to allow Line Items entered and Contact information to be exported to Excel. From the list of Expenditures, Loans / Debts, Receipts, or Contacts, click “Click to Open” on the “Search…” line.

To download all records in the given line item type or Contact:

- Click “Download Records 1 to xx”
- Click “Open” to download all the line items of the given type to Excel.

You can download a subset of the data for line items and contacts. Line item data can be subset based on Contact Last Name and/or Date Range whereas Contact data can only be subset based on Contact Last Name.

To download a subset of the line item records based on Contact Name and/or Date Range:

Enter the Contact Name and/or Min Date and/or Max Date, click Search.

The subsetted data will be displayed. The download link will show the count of records as in “Download Records 1 to xx”.

Click that download link to copy the subset of data to Excel.

To return to the full set of data, blank out the search fields and click “Search”

In Excel, the line item data will include a SourceID and SourceName for each entry. To retrieve the details of that source, export the contact data and use the “CommitteeContactId” value to match to the “SourceID” value in the line item download.

XI. FAQ’s
1. **WHO DO I CONTACT IF I HAVE QUESTIONS OR PROBLEMS WITH COMET?**
   a. You can email your questions, comments and suggestions to ef@elections.virginia.gov or call the Department of Elections at 804-864-8901 / 1-800-552-9745.

2. **WHY HAS ELECT REPLACED THE DESKTOP VAFILEING SOFTWARE?**
   a. VAFileing (first introduced in 1999) has exceeded its useful lifespan. As the product has aged, ELECT has had to divert more and more of its limited resources to provide Help Desk support for the more than 750 users. The time has come to shift from desktop software installed on each user's PC to a “cloud” application which allows users to access the program through a Web browser.

3. **WILL I BE ABLE TO CONTINUE USING PRIVATE VENDOR SOFTWARE TO FILE MY CAMPAIGN FINANCE REPORTS?**
   a. Yes. The new system will accept files generated by software on the approved vendor list. ELECT will provide vendors with new specifications and require vendors to be certified under the new system. We anticipate these changes will be minimal. However, it will be the responsibility of the vendor to make any adjustments necessary to certify the software for use by clients.

4. **CAN I USE COMET ON A MAC?**
   a. Yes. The new system will be compatible with commonly used browsers, regardless of what type of computer (PC or Apple) you are using.

5. **WHERE WILL MY DATA BE STORED AND WHO WILL HAVE ACCESS TO MY INFORMATION?**
   a. All information entered into the new application will be stored on a server managed and protected by ELECT. Just like the current system, the information you are required to disclose on campaign finance reports will not be visible to the public before the filing deadline and until you tell the system to file your report. However, any information entered (including small donors, whose names are not required to be disclosed publicly) will reside on ELECT’s server. We have put in place security measures and administrative policies to ensure the privacy of your information. In addition, the 2010 General Assembly, in anticipation of this system, passed a law that protects your information from requests under Virginia’s Freedom of Information Act.

6. **CAN I IMPORT MY VAFILEING DATA INTO COMET?**
a. No. You will retain your legacy data on your desktop. The new system will contain data only from 2012 forward.

7. **IF I NEED TO AMEND AN OLDER REPORT, WILL I USE VAFILEING OR COMET?**
   a. For now, ELECT expects that reports submitted using VAFileing will need to be amended using VAFileing.

8. **CAN I USE COMET TO FILE PAPER REPORTS WITH MY LOCAL REGISTRAR?**
   a. The online system for compiling finance reports will be available only to candidates and committees that chose the e-file option. Paper filers who currently use VAFileing to generate paper reports for submission to local registrars will have the choice of converting to e-filing or reverting to pen and paper. (Will registrars still accept paper reports generated on VAFileing?) Paper filers’ interaction with the system will be limited to preparing their Statements of Organization. In the new system, e-filers will retain the ability to print their reports on paper for review prior to submitting electronically.

9. **WILL I BE ABLE TO DOWNLOAD MY DATA INTO A FILE OR SPREADSHEET ON MY COMPUTER?**
   a. Not yet. We are developing an export feature which will allow you to download your data into Excel or a .csv file which you can then sort or filter to suit your data needs.

10. **WILL I BE ABLE TO UPLOAD DATA FROM QUICKEN OR OTHER SOFTWARE, SO I DON’T HAVE TO TYPE IT IN TWICE?**
    a. Not initially, but we intend to look into this as an option in the future.
XII. Additional Questions

If you have additional questions, comments or suggestions, please contact the Department of Elections’ Campaign Finance Section at (804) 864-8901 or via email at efile@elections.virginia.gov.