



**TO: PROSPECTIVE CANDIDATES FOR MCMINNVILLE CITY COUNCIL POSITIONS FOR NOVEMBER 3, 2026 GENERAL ELECTION:**

Thank you for your interest in running for the McMinnville City Council in 2026! Terms of office for Councilor Sal Peralta (Ward 1), Councilor Zack Geary (Ward 2), and Councilor Carson Benner (Ward 3) will expire on December 31, 2026. The Council Positions for Ward 1, Ward 2, and Ward 3 will be on the November 3, 2026, General Elections ballot. Successful candidates from each Ward position will serve a 4-year term that begins in January 2027 and ends on December 31, 2030.

The first day to file with the City Elections Officer (the City Recorder) is **June 3, 2026**. The filing process, including signature verification, must be completed by:

- **ELECTED INCUMBENT CANDIDATES:** Deadline is **August 18, 2026 at 5:00pm**. **It is strongly recommended that signature sheets be submitted no later than August 11, 2026 in order to allow for sufficient time for County verification.**
- **NON-INCUMBENT (ALL OTHER) CANDIDATES:** Deadline is **August 25, 2026, at 5:00pm**. **It is strongly recommended that signature sheets be submitted no later than August 18, 2026 in order to allow for sufficient time for County verification.**

Nomination papers include several forms that need to be submitted to the State and the City. In McMinnville, the only way a City Council candidate can qualify for the ballot is by collecting fifty (50) valid signatures during the filing period.

**Please note signature sheets must be approved by the City Elections Officer before they may be circulated to collect signatures. Signatures gathered prior to approval will be rejected.**

The following materials are intended to provide an overview of the local election process. Please read thoroughly. It is your responsibility to ensure your candidate paperwork is complete and submitted on time. For McMinnville election regulations, please refer to the [McMinnville City Charter](#). In addition to understanding McMinnville's regulations, candidates also need to be aware of State requirements, including campaign finance rules and should reference the current publications posted on the [Oregon Secretary of State Elections Division website](#). Candidates may access all State of Oregon Elections [manuals](#) and [forms](#) electronically. In addition, the [Yamhill County Elections website](#) is a valuable resource for local candidates.

As your City Elections Officer, I am here as a resource, please contact me with any questions at 503-435-5702 or email [claudia.cisneros@mcminnvilleoregon.gov](mailto:claudia.cisneros@mcminnvilleoregon.gov). **When you are ready to file your paperwork or have questions, please call or email me to **schedule an appointment**.** You may also contact the Secretary of State's Office at 503-986-1518 or Yamhill County Elections at 503-434-7518 with any questions.

Sincerely,

Claudia Cisneros  
City Recorder/City Elections Officer

## CITY COUNCIL POSITIONS FOR THE NOVEMBER 3, 2026 GENERAL ELECTION

Councilor Ward 1	Currently held by Sal Peralta	Four-Year Term
Councilor Ward 2	Currently held by Zack Geary	Four-Year Term
Councilor Ward 3	Currently held by Carson Benner	Four-Year Term

## IMPORTANT DATES

If you are interested in running for office, here are some critical dates for your calendar:

<b>June 3, 2025</b>	Any person running for a position on the City Council must have been a city resident by and since this date.
<b>June 3, 2026</b>	First day to file Prospective Petition papers with the City Elections Officer comprising of: <ul style="list-style-type: none"><li>• <a href="#">Form SEL 101</a> Candidate Filing</li><li>• <a href="#">Form SEL 121</a> Candidate Signature Sheet</li></ul> <b>Note: signature sheets (petition) must be approved before being circulated.</b>
<b>August 11, 2026</b> <i>(Elected Incumbent Candidates ONLY)</i>	<b>Strongly recommended</b> deadline to submit signature sheets for verification to the city elections officer as sheets need to be verified with the <b>County Clerk's Office and verification can take up to a few days.</b>
<b>August 18, 2026</b> <i>(Elected Incumbent Candidates ONLY)</i>	Last day for completion of all filing requirements. <b>Note: signature sheets (petition) must be verified by the County Elections Office by 4:00 p.m. on this day. If you don't have enough verified signatures your name will not appear on the November ballot.</b>
<b>August 18, 2026</b> <i>(Non-Incumbent (all other) Candidates)</i>	<b>Strongly recommended</b> deadline to submit signature sheets for verification to the city elections officer as sheets need to be verified with the <b>County Clerk's Office and verification can take up to a few days.</b>
<b>August 25, 2026</b> <i>(Non-Incumbent (all other) Candidates)</i>	Last day for completion of all filing requirements. <b>Note: signature sheets (petition) must be verified by the County Elections Office by 4:00 p.m. on this day. If you don't have enough verified signatures your name will not appear on the November ballot.</b>
<b>August 25, 2026</b>	Last day to file candidate statements for inclusion in the Yamhill County Voter Pamphlet. You will need to file this with the <a href="#">Yamhill County Clerk's Office</a> .
<b>August 28, 2026</b>	Last day to withdraw candidacy.
<b>October 13, 2026</b>	Last Day to Register to Vote.
<b>October 14 - 20, 2026</b>	The County Elections Office mails out local ballots.
<b>November 5, 2026</b>	<b>Election Day.</b>
<b>December 08, 2026</b>	Election results are certified at the City Council Regular Meeting.
<b>January 12, 2027</b>	Oath of Office is administered for all positions at the first Council meeting on January 12, 2027.

## QUALIFICATIONS FOR CANDIDACY

- Must be a City of McMinnville resident during the twelve (12) months immediately preceding the nomination.
- Must be a qualified elector (voter) in the State of Oregon.

## ABOUT THE CITY COUNCIL

- The City Council is composed of a mayor and six councilors.
- Each Council (with the exception of the Mayor) position is elected by Ward. There are three Wards in McMinnville.
- Each prospective candidate must reside in the Ward for which they are running.
- Terms are four (4) years unless one is filling an unexpired term.
- A candidate may run for only one position.
- Councilors must take an Oath of Office before commencing duties.
- The Mayor and Councilor positions are volunteer/non-paid.
- Councilors attend multiple city meetings each month including regular City Council meetings on the second and fourth Tuesdays of most months, work sessions on the Wednesday between, and other committee meetings as assigned, as well as special or emergency meetings as needs arise
- Councilors must file an annual "Statement of Economic Interest" with the Oregon Government Ethics Commission (OGEC).
- Required to take mandatory OGEC ethics training.

## HOW TO FILE FOR CANDIDACY

The City of McMinnville follows the state guidelines for Candidates Filing by Nominating Petition. Approved candidate filing forms are available from the City Recorder/Elections Officer by appointment, on the [city elections webpage](#), or you may download them directly from the [State Elections Division website](#). No filing fees are required to run for City of McMinnville offices.

**Step #1: Establish your Candidate Committee** with the [Secretary of State, Elections Division](#). These forms may be submitted electronically via the [ORESTAR system](#). Please refer to the [Campaign Finance Manual](#) or contact the [Secretary of State's office](#) for questions on the Candidate Committee, 503-986-1518. Possible forms you may be required to file are **Form SEL 220: Statement of Organization for Candidate Committee** (NOTE: SEL 220 must be filed within three (3) business days of receiving a campaign contribution that exceeds the threshold or making an expenditure) and Form [PC 7](#); Certificate of Limited Corporate Paid-in-Capital.  
**\*\*Check with the Secretary of State to confirm the requirement of Candidate Committee Forms\*\***

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**Step #2: Complete the following two forms** and submit them to the City Recorder/City Elections Officer for approval **BEFORE GATHERING ANY SIGNATURES** and **WELL** in advance of the filing deadline:

1. [Form SEL 101: Candidate Filing](#)  
and
2. [Form SEL 121: Candidate Signature Sheet – Nonpartisan](#)

Guidelines for completion of these forms are in the [County, City, and District Candidate Manual](#).

**All signature sheets (SEL 121) must be approved in writing by the City Elections Officer, before circulating.** Please contact the City Recorder/Elections Officer at 503-435-5702 or email [Claudia.Cisneros@mcminnvilleoregon.gov](mailto:Claudia.Cisneros@mcminnvilleoregon.gov) to arrange a time to review and approve your signature sheet. Once your SEL 121 has been approved, you may start collecting signatures. Failure to obtain approval prior to circulation will result in the rejection of those signature sheets.

**Step #3: The City's Elections Officer reviews** the prospective petition and provides **written approval** authorizing the candidate to begin the collection of signatures. **Signatures gathered prior to written approval will be rejected.**

**All signature sheets (SEL 121) must be approved in writing by the City Elections Officer, before circulating.** Please contact the City Recorder/Elections Officer at 503-435-5702 or email [Claudia.Cisneros@mcminnvilleoregon.gov](mailto:Claudia.Cisneros@mcminnvilleoregon.gov) to arrange a time to review and approve your signature sheet.

Once your SEL 121 has been approved, you may start collecting signatures. Failure to obtain approval prior to circulation will result in the rejection of those signature sheets.

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**Step #4: The Candidate (or circulator) Collects Signatures**

The [McMinnville City Charter](#) requires candidates to acquire a minimum of fifty (50) qualified signatures (McMinnville registered voters) from the ward in which the candidate is running in order to qualify for the ballot. The Mayoral position requires candidates to acquire a minimum of fifty (50) qualified signatures (McMinnville registered voters) from any ward within the city limits. It is recommended you gather more than the minimum to help ensure you have the required amount necessary.

Oregon law requires each petition sheet be properly certified by its circulator, who must personally witness each signature. Guidelines for the circulation of petitions are found in the State's Manual ([City, County, and District Candidate Manual](#)).

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**Step #5 Signature Sheets and Petition are Submitted to the City Elections Officer**

When ample signatures have been collected, the candidate shall submit the Petition Submission Form ([SEL 338](#)) and completed Signature Sheets ([SEL 121](#)) to the City Elections Officer/ City Recorder. The signature sheets and petition submission should be turned in:

- **ELECTED INCUMBENT CANDIDATES:** The signature sheets and petition submission should be turned in no later than **Tuesday, August 11, 2026**, in order to provide sufficient time for the signature verification process
- **NON-INCUMBENT (ALL OTHER) CANDIDATES:** The signature sheets and petition submission should be turned in no later than **Tuesday, August 18, 2026**, in order to provide sufficient time for the signature verification process.

**Sheets need to be verified with the County Clerk's Office, and verification can take up to a few days.**

When submitting the signature sheet to the City Elections Officer/City Recorder, the candidate will:

- Ensure each signature sheet certification is signed and dated by the circulator; and
- Number each signature sheet sequentially in the space provided.

The City Elections Officer/City Recorder will deliver the original signature sheets and petition submission to the Yamhill County Clerk's Office to verify signatures.

If it is determined that there are **insufficient valid signatures** and the filing deadline has not passed, the candidate may gather and submit additional signatures.

## Step #6 Complete Filing

The candidate will be notified in writing once the signatures have been verified by the Yamhill County Clerk's Office. If the candidate qualifies to be added to the ballot, Candidates will have five days to sign an **Acceptance of Nomination Form**. The City Elections Officer will provide you with this form and will arrange a time to collect your signature.

- **ELECTED INCUMBENT CANDIDATES:** The filing process, including all signature verifications, must be completed by **August 18, 2026, at 5:00 p.m.**
- **NON-INCUMBENT (ALL OTHER) CANDIDATES:** The filing process, including all signature verifications, must be completed by **August 25, 2026, at 5:00 p.m.**

## WITHDRAWAL OF CANDIDACY OR NOMINATION

To withdraw from candidacy or nomination, a candidate must file a [SEL 150 Candidate Filing Withdrawal form](#) with the City Elections Officer no later than **August 28, 2026**, for the **November 3, 2026**, General Election.

## FOLLOW CAMPAIGN FINANCE REPORTING REQUIREMENTS

As required by state law, candidates must follow campaign finance reporting requirements. **All campaign finance reporting is handled at the Oregon Secretary of State Elections Division.**

All forms and additional information regarding the campaign finance reporting are located on the [Oregon Secretary of State Elections Division website](#). See the [Campaign Finance Manual](#) for detailed information. The Oregon Secretary of State campaign finance electronic program is referred to as ORESTAR. A [Transaction Filing in ORESTAR "Quick Guide"](#) has been included in the packet. If you have questions regarding Campaign Finance, please contact the Oregon Secretary of State Elections Division at 503-986-1518 or [orestar-support.sos@oregon.gov](mailto:orestar-support.sos@oregon.gov).

## Campaign Finance Guidelines

Each candidate must establish a campaign account and file a [Statement of Organization \(SEL 220\)](#) designating a candidate committee **unless** the candidate meets **ALL** three of the following conditions:

- The candidate serves as the candidate's own treasurer; **AND**
- The candidate does not have an existing candidate committee; **AND**
- The candidate does not expect to spend or receive more than \$1,500 during the entire calendar year.

See the [Campaign Finance Manual](#) for more detailed information.

You must keep track of all contributions and expenditures because if you exceed the \$1,500 threshold, you must establish a committee and open a dedicated bank account not later than three business days after exceeding the threshold.

If you do not meet all the above conditions and do not expect to receive a total of more than \$5,00 or spend a total of more than \$5,00 for the entire calendar, you must do all of the following:

- File a Statement of Organization (SEL 220) and establish a dedicated bank account – either by using ORESTAR or by submitting the paper form [Statement of Organization \(SEL 220\)](#); **AND**
- File a Certificate of Limited Contributions and Expenditures either by using ORESTAR or by submitting the paper form [Certificate of Limited Contributions and Expenditures PC7](#) not later than seven days after receiving a contribution or making an expenditure.

If you expect to spend or receive more than \$5,00, you will need to do the following:

- Establish a dedicated campaign bank account.
- File a Statement of Organization (SEL 220) and establish a dedicated bank account – either by using ORESTAR or by submitting the paper form [Statement of Organization \(SEL 220\)](#); **AND**
- File campaign finance transactions using ORESTAR.

### **STATEMENT OF ECONOMIC INTEREST / STATE REPORTING REQUIREMENTS**

All persons holding office in the City of McMinnville are required to file an Annual Verified Statement of Economic Interest (SEI) with the Oregon Government Ethics Commission (OGEC). The SEI must be filed by April 15 every year of the incumbency of the elected official. Information will be requested concerning sources of income, property, business interests, and gifts related to the office. Civic penalties may be imposed for failure to file or for insufficient information. Training webinars, sample forms, and additional information are located at [www.oregon.gov/OGEC](http://www.oregon.gov/OGEC). For questions, contact the Oregon Government Ethics Commission at [mail@ogec.oregon.gov](mailto:mail@ogec.oregon.gov) or (503) 378-5105.

### **THE COUNTY VOTERS' PAMPHLET**

Candidates have the opportunity to place a statement in the [Yamhill County Voter Pamphlet](#). Each candidate is responsible for their own voters' pamphlet submission to the [County Clerk's Office](#) which generally includes a current photograph, a brief biography, and a statement on issues. City candidates' deadline to file a Voter's Pamphlet statement is **August 25, 2026**. City candidate statements will become public by **August 31, 2026**. Application forms can be obtained from [Yamhill County Elections](#).

### **POLITICAL SIGNS AND PRINTED MATERIAL**

[McMinnville Municipal Code Chapter 17.62.060 Temporary Signs](#) – Election signs cannot be posted more than 6 weeks before an election and must be removed within fourteen (14) days following the election.

#### **Election Sign Display Period for the November 3, 2026 Election**

*September 22, 2026 – November 17, 2026*

Please refer to the City of McMinnville document titled "[Temporary Political Signs](#)" for more information.

### **MISCELLANEOUS**

All forms for City elections are filed and maintained by the City Elections Officer/City Recorder and are a matter of public record.

As the Elections Officer for the City of McMinnville, the City Recorder is available as a resource during your candidacy. Please call City Recorder Claudia Cisneros at 503-435-5702 if you have any questions on the election process or contact her by e-mail at [claudia.cisneros@mcminnvilleoregon.gov](mailto:claudia.cisneros@mcminnvilleoregon.gov).

## RESOURCES

Secretary of State's Elections Division  
(503) 986-1518

<https://sos.oregon.gov/voting-elections/Pages/default.aspx>

Campaign Finance

Campaign Finance Manual – SOS

ORESTAR Quick Guide – Transaction Filing

Email: [orestar-support.sos@oregon.gov](mailto:orestar-support.sos@oregon.gov)

[McMinnville City Charter](#)  
[McMinnville Political Signs](#)

Yamhill County Clerk

(503) 434-7518

Email: [clerk@yamhillcounty.gov](mailto:clerk@yamhillcounty.gov)

<https://www.yamhillcounty.gov/404/Clerk-Records-Elections>

[Voter Pamphlet Instructions & Forms](#)

[Attorney General's Public Records & Meeting Manual](#)

[Oregon Government Ethics Law – A Guide for Public Officials](#)



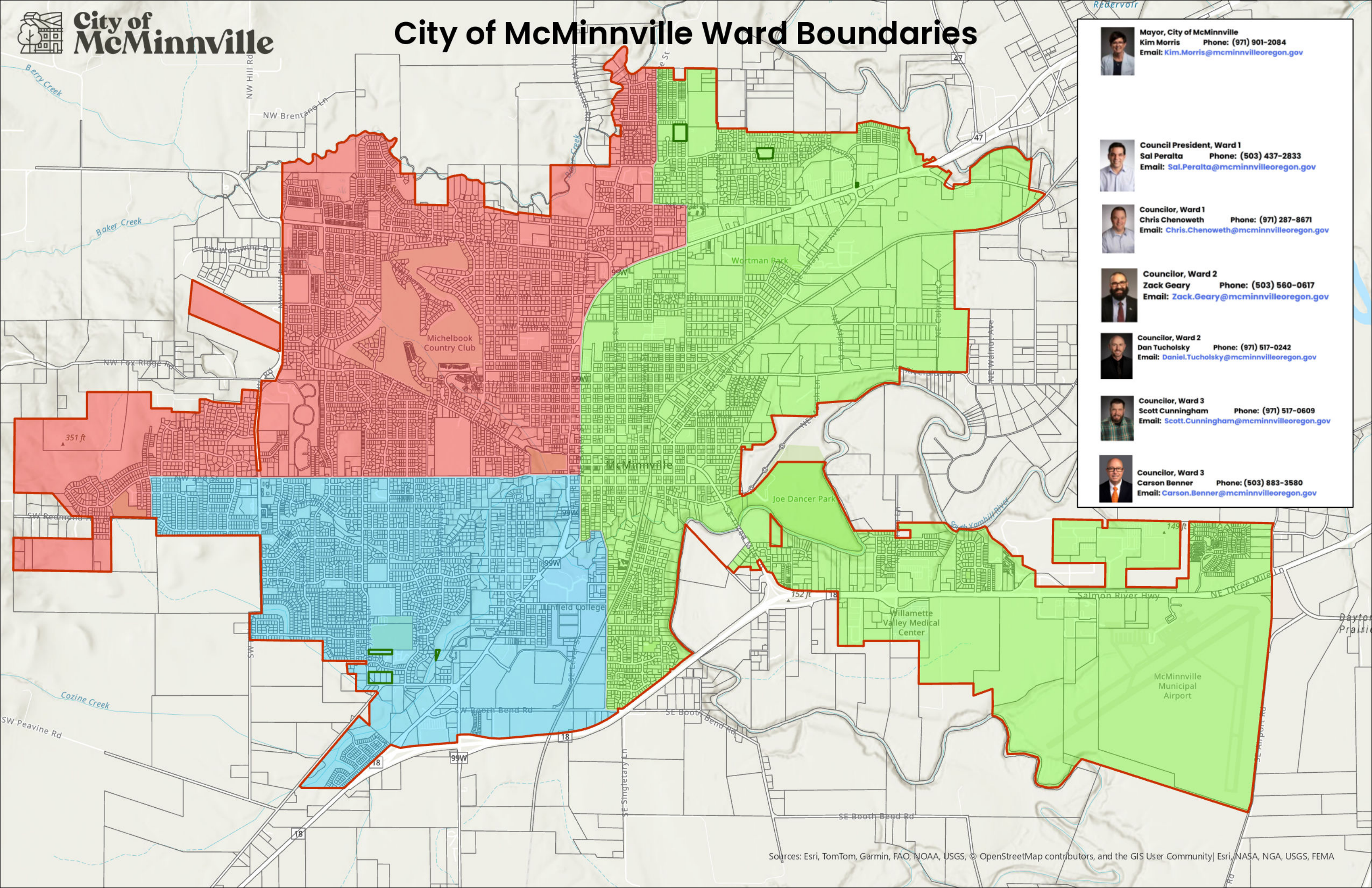
# City of McMinnville


## November 3, 2026 Elections Calendar


City Councilors Ward 1, 2, & 3


<b>First day</b> to file as a candidate	June 3, 2026
<b>First day</b> to submit statement to County for voter's pamphlet	July 6, 2026
Strongly <b>recommended deadline</b> to submit signature sheets for verification to the city elections officer as sheets need to be verified with the County Clerk's Office and verification can take up to a few days.	<b>August 11, 2026</b> (For Elected Incumbent Candidates)  <b>August 18, 2026</b> (For Non-Incumbent - all other Candidates)
<b>Last day</b> for completion of all filing requirements.	<b>August 18, 2026</b> (For Elected Incumbent Candidates)  <b>August 25, 2026</b> (For Non-Incumbent - all other Candidates)
<b>Last day</b> to file candidate statement for inclusion in the Yamhill County Voter Pamphlet.	August 25, 2026
<b>Last day</b> to withdraw candidacy.	August 28, 2026
<b>Election Sign display period</b>	September 22, 2026 – November 17, 2026
<b>Last day</b> to register to vote.	October 13, 2026
<b>Election Day</b>	<b>November 3, 2026</b>
Election results are certified at the City Council Regular Meeting	TBD - December 2026 Mtg
<b>Oath of Office</b> administered to elected candidates.	January 12, 2027


# City of McMinnville Ward Boundaries




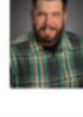
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**Mayor, City of McMinnville**  
**Kim Morris** Phone: (971) 901-2084  
 Email: [Kim.Morris@mcminvilleoregon.gov](mailto:Kim.Morris@mcminvilleoregon.gov)
  
- 

**Council President, Ward 1**  
**Sal Peralta** Phone: (503) 437-2833  
 Email: [Sal.Peralta@mcminvilleoregon.gov](mailto:Sal.Peralta@mcminvilleoregon.gov)
  
- 

**Councilor, Ward 1**  
**Chris Chenoweth** Phone: (971) 287-8671  
 Email: [Chris.Chenoweth@mcminvilleoregon.gov](mailto:Chris.Chenoweth@mcminvilleoregon.gov)
  
- 

**Councilor, Ward 2**  
**Zack Geary** Phone: (503) 560-0617  
 Email: [Zack.Geary@mcminvilleoregon.gov](mailto:Zack.Geary@mcminvilleoregon.gov)
  
- 

**Councilor, Ward 2**  
**Dan Tuchsosky** Phone: (971) 517-0242  
 Email: [Daniel.Tuchsosky@mcminvilleoregon.gov](mailto:Daniel.Tuchsosky@mcminvilleoregon.gov)
  
- 


**Councilor, Ward 3**  
**Scott Cunningham** Phone: (971) 517-0609  
 Email: [Scott.Cunningham@mcminvilleoregon.gov](mailto:Scott.Cunningham@mcminvilleoregon.gov)
  
- 

**Councilor, Ward 3**  
**Carson Benner** Phone: (503) 883-3580  
 Email: [Carson.Benner@mcminvilleoregon.gov](mailto:Carson.Benner@mcminvilleoregon.gov)

# County, City, and District Candidate Manual

*Published by*

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Salem, OR 97310-0722

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*Adopted by*

Oregon Administrative Rule No. 165-010-0005



## Secretary of State

Elections Division Rev. 11/2025

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# Using This Manual

## Icons

The following icons are used in this manual to emphasize information:



**alert icon**  
indicates alert; warning; attention needed



**info icon**  
indicates additional information



**deadline icon**  
indicates a deadline



**petition sheet icon**  
indicates a reference to a signature sheet



**form icon**  
indicates a reference to a form



**search icon**  
indicates information located elsewhere


## Help

For help, please contact:

Elections Division  
255 Capitol St NE Suite 126  
Salem OR 97310

 **503 986 1518**  
**fax 503 373 7414**

 [elections.sos@sos.oregon.gov](mailto:elections.sos@sos.oregon.gov)  
 [www.oregonvotes.gov](http://www.oregonvotes.gov)

 **1 866 673 8683**  
se habla español

**tty 1 800 735 2900**  
for the hearing impaired

## Other Assistance

For city candidate assistance contact your city administrator or city recorder (auditor). For county and district candidate assistance, contact your county:

### Baker County

1995 Third St, Ste 150  
Baker City, OR 97814-3365  
541-523-8207/TTY 800-735-2900  
[skirby@bakercountyor.gov](mailto:skirby@bakercountyor.gov)

### Benton County

4500 SW Research Way, 2nd Floor  
Corvallis, OR 97333  
541-766-6756/TTY 541-766-6080  
[elections@bentoncountyor.gov](mailto:elections@bentoncountyor.gov)

### Clackamas County

1710 Red Soils Ct, Ste 100  
Oregon City, OR 97045-4300  
503-655-8510/TTY 503-655-1685  
[elections@clackamas.us](mailto:elections@clackamas.us)

### Clatsop County

820 Exchange St, Ste 220  
Astoria, OR 97103-4609  
503-325-8511/TTY 800-735-2900  
[clerk@clatsopcounty.gov](mailto:clerk@clatsopcounty.gov)

### Columbia County

Courthouse 230 Strand St.  
St Helens, OR 97051-2040  
503-397-3796/TTY 503-397-7246  
[elections@columbiacountyor.gov](mailto:elections@columbiacountyor.gov)

### Coos County

Courthouse 250 N Baxter St.  
Coquille, OR 97423-1875  
541-396-7610/TTY 800-735-2900  
[coosclerk@co.coos.or.us](mailto:coosclerk@co.coos.or.us)

### Crook County

Courthouse 300 NE Third St, Rm 23  
Prineville, OR 97754-1919  
541-447-6553/TTY 800-735-2900  
[elections@crookcountyor.gov](mailto:elections@crookcountyor.gov)

### Curry County

94235 Moore St, Ste 212  
Gold Beach, OR 97444-97055  
541-247-3297 or 877-739-4218  
[clerk@co.curry.or.us](mailto:clerk@co.curry.or.us)

### Deschutes County

PO Box 6005  
Bend, OR 97708-6005  
541-388-6547/TTY 1-800-735-2900  
[elections@deschutescounty.gov](mailto:elections@deschutescounty.gov)

### Douglas County

PO Box 10  
Roseburg, OR 97470-0004  
541-440-4252/TTY 1-800-735-2900  
[elections@douglascountyor.gov](mailto:elections@douglascountyor.gov)

### Gilliam County

PO Box 427  
Condon, OR 97823-0427  
541-351-9491/TTY 800-735-2900  
[ellen.wagenaar@gilliamcountyor.gov](mailto:ellen.wagenaar@gilliamcountyor.gov)

**Grant County**

201 S Humbolt, Ste 290  
Canyon City, OR 97820-6186  
541-575-1675/TTY 800-735-2900  
[catesl@grantcounty-or.gov](mailto:catesl@grantcounty-or.gov)

**Harney County**

450 N Buena Vista Ave, Ste 14  
Burns, OR 97720-1565  
541-573-6641/TTY 800-735-2900  
[elections@harneycountyor.gov](mailto:elections@harneycountyor.gov)

**Hood River County**

601 State St  
Hood River, OR 97031-1871  
541-386-1442/TTY 800-735-2900  
[elections@hoodrivercounty.gov](mailto:elections@hoodrivercounty.gov)

**Jackson County**

1101 W Main St, Ste 201  
Medford, OR 97501-2369  
541-774-6148/TTY 800-735-2900  
[elections@jacksoncountyor.gov](mailto:elections@jacksoncountyor.gov)

**Jefferson County**

Courthouse 66 SE D St, Ste C  
Madras, OR 97741-1739  
541-475-4451/TTY 800-735-2900  
[elections@jeffersoncountyor.gov](mailto:elections@jeffersoncountyor.gov)

**Josephine County**

PO Box 69  
Grants Pass, OR 97528-0203  
541-474-5243/TTY 1-800-735-2900  
[clerk@josephinecounty.gov](mailto:clerk@josephinecounty.gov)

**Klamath County**

305 Main St  
Klamath Falls, OR 97601-6332  
541-883-5134/TTY 800-735-2900  
[elections@klamathcounty.org](mailto:elections@klamathcounty.org)

**Lake County**

513 Center St.  
Lakeview, OR 97630-1539  
541-947-6006/ TTY 800-735-2900  
[elections@co.lake.or.us](mailto:elections@co.lake.or.us)

**Lane County**

275 W 10th Ave.  
Eugene, OR 97401-3008  
541-682-4234/TTY 800-735-2900  
[elections@lanecountyor.gov](mailto:elections@lanecountyor.gov)

**Lincoln County**

225 W Olive St, Rm 201  
Newport, OR 97365-3811  
541-265-4131/TTY 800-735-2900  
[countyclerk@co.lincoln.or.us](mailto:countyclerk@co.lincoln.or.us)

**Linn County**

PO Box 100  
Albany, OR 97321-0031  
541-967-3831/TTY 800-735-2900  
[elections@co.linn.or.us](mailto:elections@co.linn.or.us)

**Malheur County**

251 B St. W, Ste 4  
Vale, OR 97918-1375  
541-473-5151/TTY 800-735-2900  
[elections@malheurco.org](mailto:elections@malheurco.org)

**Marion County**

PO Box 14500  
Salem, OR 97309-5036  
503-588-5041 or 800-655-5388  
TTY 503-588-5610  
[elections@co.marion.or.us](mailto:elections@co.marion.or.us)

**Morrow County**

PO Box 338  
Heppner, OR 97836-0338  
541-676-5604/TTY 800-735-2900  
[elections@morrowcountyor.gov](mailto:elections@morrowcountyor.gov)

**Multnomah County**

1040 SE Morrison St  
Portland, OR 97214-2417  
503-988-8683/ TTY 800-735-2900  
[elections@multco.us](mailto:elections@multco.us)

**Polk County**

850 Main St, Rm 201  
Dallas, OR 97338-3179  
503-623-9217/TTY 800-735-2900  
[clerk.elections@polkcountyor.gov](mailto:clerk.elections@polkcountyor.gov)

**Sherman County**

PO Box 243  
Moro, OR 97039-0365  
541-565-3606/TTY 800-735-2900  
[countyclerk@shermancounty.net](mailto:countyclerk@shermancounty.net)

**Tillamook County**

201 Laurel Ave.  
Tillamook, OR 97141-2311  
503-842-3402/TTY 800-735-2900  
[clerk@tillamookcounty.gov](mailto:clerk@tillamookcounty.gov)

**Umatilla County**

216 SE 4th St, Ste 18  
Pendleton, OR 97801-2699  
541-278-6254/TTY 800-735-2900  
[elections@umatillacounty.gov](mailto:elections@umatillacounty.gov)

**Union County**

1001 Fourth St, Ste D  
La Grande, OR 97850-2100  
541-963-1006/TTY 800-735-2900  
[clerk@union-county.org](mailto:clerk@union-county.org)

**Wallowa County**

101 S River St, Ste 100  
Enterprise, OR 97828-1363  
541-426-4543, option 3/TTY 800-735-2900  
[slathrop@wallowacounty.gov](mailto:slathrop@wallowacounty.gov)

**Wasco County**

401 E 3<sup>rd</sup> Street, STE 100  
The Dalles, OR 97058-2562  
541-506-2530/TTY 800-735-2900  
[countyclerk@co.wasco.or.us](mailto:countyclerk@co.wasco.or.us)

**Washington County**

2925 NE Aloclek Dr, Ste 170  
Hillsboro, OR 97124  
503-846-5800/TTY 800-735-2900  
[Elections@washingtoncountyor.gov](mailto:Elections@washingtoncountyor.gov)


**Wheeler County**

PO Box 327  
Fossil, OR 97830-0327  
541-763-2374/TTY 800-735-2900  
[bsnowpotter@co.wheeler.or.us](mailto:bsnowpotter@co.wheeler.or.us)

**Yamhill County**

414 NE Evans St  
McMinnville, OR 97128-4607  
503-434-7518/TTY 800-735-2900  
[elections@yamhillcounty.gov](mailto:elections@yamhillcounty.gov)

## 2026 Local Elections Calendar

	Last day for	March 10	Primary Election May 19	August 25	General Election November 3
<b>County Elections Official to Publish</b>					
→ notice of district board election ( <a href="#">ORS 255.075</a> )	November 22, 2025	January 22	May 9	July 9	
<p><b>⚠ To ensure compliance with Section 17b of HB 4024 (2024), the notice should be filed by the 47th day before the filing deadline.</b></p> <p><b>⚠ Regular district elections are generally held in May of odd numbered years. Districts should contact the county elections official of the county in which the district's administrative office is located for election information.</b></p>					
<b>County, City or District Candidates to file with Local Elections Official (other than Elected Incumbents)</b>					
→ a declaration of candidacy and required filing fee	January 8	March 10	June 25	August 25	
→ a verified nominating petition containing 100% of the required number of signatures					
<b>County, City or District Elected Incumbent Candidates to file with Local Elections Official</b>					
→ a declaration of candidacy and required filing fee	January 2	March 3	June 18	August 18	
→ a verified nominating petition containing 100% of the required number of signatures					
<b>County, City or District Candidates to file Voters' Pamphlet with Local Elections Official</b>					
→ a statement for inclusion in county voters' pamphlet	January 9	March 12	June 26	August 25	
<p><b>ⓘ District Candidates:</b> The enabling statutes, or principal act, of a district specifies how board members are elected. Most districts, as defined in <a href="#">ORS 255.012</a>, elect board members at the regular district election which is held in May of odd numbered years or at the Primary or General Election. As provided for in <a href="#">ORS 255.235(2)(a)</a>, the March and August deadlines included above are only applicable if the election is a district's first election to elect board member and are not included in the daily calendar.</p>					

## 2027 Local Elections Calendar



Last day for

March 9

May 18

August 24

November 2

### County Elections Official to Publish

→ notice of district board election (ORS 255.075)

November 21,  
2026

January 30

May 8

July 17

**i** To ensure compliance with Section 17b of HB 4024 (2024), the notice should be filed by the 47<sup>th</sup> day before the filing deadline.

**i** Regular district elections are generally held in May of odd numbered years. Districts should contact the county elections official of the county in which the district's administrative office is located for election information.

### Candidates to file for Office with County Elections Official

→ verified signatures or \$10 filing fee (ORS 255.235)

January 7\*

March 18\*

June 24\*

September 2\*

\*An incumbent seeking re-election to the same office must file their declaration of candidacy or nominating petition at least seven days before applicable filing deadline for non-incumbent candidates. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.

### Candidates to file Voters' Pamphlet with County Elections

→ statement for inclusion in county voters' pamphlet

January 8

March 19

June 25

September 3

**i** **County and City Candidates:** Deadlines applicable to county and city office are not included on this calendar. Candidates for those offices, unless otherwise provided for by charter or ordinance, are elected at the primary or general election. If a county or city charter provides for candidates to be elected at an election other than the primary or general election but does not specify a deadline or adopts the statutory filing deadline, ORS 249.722 applies.

**i** **District Candidates:** The enabling statutes, or principal act, of a district specifies how board members are elected. Most districts, as defined in ORS 255.012, elect board members at the regular district election which is held in May of odd numbered years or at the Primary or General Election. The March, August and November deadlines included above, are only applicable if the election is a district's first election to elect board member (ORS 255.235(2)(a)). They are not included in the daily calendar.

# Getting Started

## Types of Public Office

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There are two types of public office in Oregon, partisan and nonpartisan.

### Partisan Offices

A partisan office is an office for which a candidate may be nominated by a major or minor political party or as a nonaffiliated candidate.

Partisan offices include:

- County Commissioner (unless county home rule charter or ordinance specifies otherwise) and
- Precinct Committeeperson.

### Nonpartisan Offices

A nonpartisan office is an office for which a candidate does not run under the name of any political party. All candidates for nonpartisan office must run in the primary election.

Nonpartisan offices include:

County Commissioner (unless county home rule charter or ordinance specifies otherwise), County Clerk, Sheriff, County Assessor, County Auditor, County Treasurer, County Tax Collector, County Surveyor, Justice of the Peace, County Judge who exercises judicial functions, Mayor, City Councilor, Municipal Judge, Board Member, Director of a District, all Special District offices, any elected office of a metropolitan service district under [ORS chapter 268](#), and any office designated nonpartisan by a home rule charter or ordinance.

For local offices not listed, please contact the local elections official to determine whether the office is partisan or nonpartisan.

## Deadlines to File for Public Office

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All candidacy filings must be delivered to and actually received at the office of the designated filing officer not later than 5:00:00 pm on the applicable filing deadline. Any applicable filing fees must also be received not later than 5:00:00 pm on the applicable filing deadline. When a person chooses to submit signatures in lieu of paying the filing fee, they may be subject to earlier deadlines to guarantee the filing officer will have sufficient time to verify the signatures before 5:00:00 pm on the applicable filing deadline.

Section 17b of House Bill 4024 (2024) changed the candidate filing deadline for incumbent public office holders. An incumbent seeking re-election to the same office must file their declaration of candidacy or nominating petition at least seven days before the applicable filing deadline for non-incumbent candidates. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.

### Filing deadlines for:

Precinct Committeeperson - can be found on page 10

County Candidates Partisan Office - can be found on page 12

County Candidates Nonpartisan Office - can be found on page 21

City Candidates - can be found on page 23


District Candidates - can be found on page 25

## Filing Methods for Public Office

Generally, candidates may file for public office by:

- submitting a completed candidate filing form and paying the required filing fee, if any;
- or

- submitting a nominating petition containing the required number of valid signatures.

 A prospective petition may be filed at any time. However, candidates need to allow enough time for signature collection and signature verification to be completed by county elections officials prior to the filing deadline.

 See the Filing Requirements on pages 10, 12, 21, 23 and 25 for filing fees and deadline to submit completed forms.

Candidate filing forms can be submitted by:

- mail, fax, or as a scanned attachment to an email.

## Multiple Nominations to Public Offices

In Oregon, **candidates running for partisan office** may be nominated by multiple political parties. Candidates nominated by more than one party or by other nominating processes may select up to three parties or designations to be printed with their name on the general election ballot.

A candidate may designate the order in which the parties or designations will be listed, with two exceptions:

- If a political party nominates one of its members for a partisan office, that party will be listed first, followed by no more than two additional parties.
- If individual electors or an assembly of electors nominate a nonaffiliated candidate, “nonaffiliated” will be listed first, followed by no more than two additional parties.

When selecting political parties or other designations the following rules apply:


	<b>Candidate is nominated by:</b>	<b>Information and default order listed on ballot:</b>
<b>Member of political party</b>	Party of which the candidate is a member	The ballot lists this party first, followed by two or fewer additional parties in alphabetical order. The candidate may specify a different order for the additional parties.
	Party of which the candidate is not a member	The ballot lists three or fewer parties in alphabetical order. The candidate may specify a different order. If more than three parties nominate the candidate, the candidate may choose which appear.
<b>Not affiliated with any political party</b>	Individual Electors or Assembly of Electors	The ballot lists “nonaffiliated” first, followed by two or fewer parties in alphabetical order. The candidate may specify a different order for parties. If more than two parties nominate the candidate, the candidate may choose which appear.
	Any political party	Three or fewer parties are listed in alphabetical order. If more than three parties nominate the candidate, the candidate may choose which appear.

## Running for Multiple Offices

---

Candidates can file for more than one position as long as the offices are:

- not on the same district board;
- not a city office on the same ballot;
- not for more than one precinct committeeperson's office; and
- not a lucrative office;

 An office is considered lucrative if a salary or other compensation beyond expenses is attached to it; it is created by statute or the constitution; its holder exercises part of the sovereign power of government; it is a matter of public concern; and the position is not temporary or intermittent.

## Campaign Finance Reporting

---

Oregon campaign finance law may require candidates to establish a campaign account, file a Statement of Organization designating a candidate committee and file contribution and expenditure transactions with the Elections Division.

For further details on campaign finance reporting requirements, review:

 The [Campaign Finance Manual](#), and the [ORESTAR User's Manuals](#) available at [www.oregonvotes.gov](http://www.oregonvotes.gov).

## Qualifications for Public Office

---

The qualifications for public offices differ depending on the office. Before filing, the candidate should review the constitutional and statutory requirements for the office sought.

 See the qualifications for most offices provided in each applicable section of this manual.

However, qualifications for city or district office are governed by city charter or ordinance or district by-laws and are not provided. Contact the local elections official for more information.

# Precinct Committeeperson Candidates

ORS 248.015-248.029, 249.031, and 249.037

## Qualifications for Precinct Committeeperson

All Candidates must be US Citizens and Registered Voters

Office	Age	Residency	Term of Office	Vacancies
Precinct Committeeperson	18	A candidate may be elected to represent the precinct in which they reside, an adjoining precinct in the same county or a precinct that is in the same county and the same state representative district as the precinct the candidate resides in. ORS 248.015	A precinct committeeperson holds office from the 35 <sup>th</sup> day after the primary to the 35 <sup>th</sup> day after the next primary.	Vacancies are filled according to ORS 248.026.

### Special Requirements

To be placed on the ballot, a candidate must be a member of the major political party by September 11, 2025.

A write-in candidate must be a member of the major political party for 180 days prior to the Primary election.

An otherwise qualified person who becomes a U.S. citizen during the filing period, and who is registered as a member of the major political party on or before the deadline for filing a declaration of candidacy or a write-in declaration; is eligible to file to be listed on the ballot and to be elected to the office, including by write-in votes.

Any votes received for a write-in candidate will only be counted if an [SEL 105D Write-In Candidate Declaration](#) or [SEL 105N Write-In Candidate Nomination](#) is filed no later than May 19, 2026, 8 pm.

Any candidate must receive at least 3 votes to be elected to the office.

## Filing Requirements for Precinct Committeeperson

All filings required to be filed must be delivered to and actually received at the office of the designated officer not later than 5:00:00 pm on the applicable filing deadline.

Office	Filing Fee	First day to file	Last day to file	Last day to Withdraw
Precinct Committeeperson	None	September 11, 2025	March 10, 2026	March 13, 2026
Write-In Declaration	None	September 11, 2025	May 19, 2026, 8 pm	Not applicable
Write-In Nomination	None	September 11, 2025	May 19, 2026, 8 pm	Not applicable

## Filing Method for Precinct Committeeperson Candidate

A precinct committeeperson candidate must choose one of two methods of election and file the required form with the **county elections** official. They may also be nominated by another person, if the person resides in the same precinct, adjacent precinct, or house district as the candidate.



See the instructions for completing the required portions of the [Candidate Filing form on page 33](#).

### Candidate Filing

A precinct committeeperson candidate who wants their name to appear on the ballot must file:



Form SEL 105 Candidate Filing – Precinct Committeeperson



A person may not hold office as a committeeperson in more than one precinct. A person may only file for one precinct committeeperson at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. [ORS 249.013](#)

### Write-In Candidate Declaration

A precinct committeeperson candidate who wants to be elected by write-in votes must file:



Form SEL 105D Write-In Declaration – Precinct Committeeperson



Filing Form SEL 105D withdraws any precinct committeeperson candidate declaration previously filed for the same election. County elections officials will only count the write-in votes received by candidates who file Form 105D no later than 8 pm, May 19, 2026.

### Write-In Nomination

An elector who wants to nominate another elector as a write-in precinct committeeperson must file:



Form SEL 105N Write-In Nomination – Precinct Committeeperson

## County Candidates

### General Information

*ORS 249.056*

Candidates may file with the county elections office by paying a fee or by petition to obtain signatures.



See the instructions for completing the required portions of the [Candidate Filing form on page 33](#).



A prospective petition may be filed at any time. However, candidates need to allow enough time for signature collection and signature verification to be conducted by county elections officials prior to the filing deadline.

County charter requirements for county offices may differ. For information regarding specific candidate filing requirements for county office, contact the county elections official.




A person may only file for one lucrative office at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. [ORS 249.013](#)

# Partisan Office – County

ORS 249.031






## Qualifications

All Candidates must be US Citizens and Registered Voters

Office	Age	Residency	Term of Office	Special Requirements	Vacancies
<b>County Commissioner</b>	18	Resident of county one year prior to election ORS 204.016	4 years ORS 204.010	This is a partisan office unless a county home rule charter or ordinance deems it nonpartisan.  Contact the local elections official for further information.	County governing body appoints qualified person until successor is elected ORS 236.215

## Filing Requirements

All filings and an accompanying payment of fees or verified signatures required to be filed, must be delivered to, and actually received at the office of the designated officer not later than 5:00:00 pm on the applicable filing deadline.

Office	Major Party Fee or Required Signatures	Minor Party	Individual Electors	Assembly of Electors
 <b>First Day to File</b>	September 11, 2025	June 3, 2026	June 3, 2026	June 3, 2026
 <b>Last Day for Candidates to File</b> <i>(other than Elected Incumbents)</i>	March 10, 2026	August 25, 2026	August 25, 2026	August 25, 2026
 <b>Last Day for Elected Incumbent Candidates to File</b>	March 3, 2026	August 18, 2026	August 18, 2026	August 18, 2026
 <b>Last Day to Withdraw</b>	March 13, 2026	August 28, 2026	August 28, 2026	August 28, 2026
<b>County Commissioner</b>  Contact the local elections official for applicable charter or ordinance provisions that may supersede this information.	\$50 <b>or</b> The lesser of either 500 signatures or 2% of the number of votes cast in the county for US President by members of the candidate’s party	Nominating convention held in accordance with party bylaws and state law	Number of signatures equal to 1% of the number of votes cast in the county for US President	250 signatures obtained at a nominating convention held in one place, at one time, during a 12-hour period

# Major Party Candidates – County

## Party Membership Required for Party Nomination

Major political party candidates must be registered to vote as a member of that political party 180 days before the deadline for filing a nominating petition or declaration of candidacy. Exceptions are allowed if the candidate's registration is inactive, or the candidate will turn 18 within the period of 180 days. [ORS 249.046](#)



**The deadline to register as a member of the major political party is September 11, 2025. \***

\*An incumbent seeking re-election to the same office must ensure they are registered with the major political party by September 4, 2025. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.



A major political party candidate on the primary election ballot who is not nominated to the general election may not be the candidate of any other political party or become a nonaffiliated candidate for the same office at the general election. [ORS 249.048](#)

## Filing Methods for a Major Party Candidate Other than Precinct Committeeperson

[ORS 249.031](#)



A person may only file for one lucrative office at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. [ORS 249.013](#)

### Filing by Fee

[ORS 249.056](#)

A candidate must file:



Form SEL 101 Candidate Filing – Major Political Party or Nonpartisan;

**and**

→ Pay the required filing fee, if any; See Filing Requirements on page 12.

### Filing by Petition

[ORS 249.008](#), [249.020](#), [249.031](#), [249.035](#), and [249.061-249.076](#)

The following information provides instructions on collecting and submitting sufficient valid signatures to place the candidate's name on the ballot.



Violations of certain circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. [ORS 260.715](#)

### Prospective Petition

Prior to obtaining any signatures, candidates must file the following to begin the signature sheet approval process:



Form SEL 101 Candidate Filing-Major Political Party or Nonpartisan marked "Prospective Petition"

**and**



Form SEL 102 Candidate Signature Sheet – Major Party.



See Signature Sheet Requirements on page 28.

Forms are available online at [www.oregonvotes.gov](http://www.oregonvotes.gov).

## Approval to Circulate

After receiving the completed forms, the elections official reviews for required information and if complete will provide written approval to circulate the prospective nominating petition that includes:

- petition number;
- number of signatures required; and
- filing deadline.



All signature sheets must be approved in writing by the elections official before circulating. Failure to do so will result in the rejection of the signature sheets.

## Required Signatures

County partisan candidate must have the lesser of either:

- 500 signatures;
- or
- 2% of the number of votes cast in the electoral district for president by members of the candidate's party.

## Complete Filing

To complete the filing process a candidate must:

- 1 ensure each signature sheet certification is signed and dated by the circulator;
- 2 submit the signature sheets with Form [SEL 338 Petition Submission – Candidate, Voters' Pamphlet](#) to the county elections official for verification allowing sufficient time for the verification process to be completed prior to the filing deadline.

## Filing Methods for a Minor Party Candidate

Minor political parties may nominate candidates for any partisan office in a general or special election, including federal, state, and county offices, as long as the party has been established within the electoral district and meets ongoing requirements to maintain status as a minor political party.

A minor political party nominates candidates by convening a nominating convention that complies with party bylaws and state law. Candidates that are nominated by a recognized minor political party complete and file the following form with the appropriate elections official:



Form [SEL 110 Candidate Filing – Minor Political Party](#) with the Candidates Nomination Certificate executed by a party officer and notarized.

## Nonaffiliated Candidates – County

To qualify for nomination by Individual Electors, or to conduct an Assembly of Electors, the candidate must be registered to vote as a nonaffiliated voter at least 180 days before the deadline for filing the certificate of nomination.



**The deadline to register as a nonaffiliated voter is February 26, 2026. \***

\*An incumbent seeking re-election to the same office must ensure they are registered to vote as nonaffiliated voter by February 19, 2026. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.

## Filing Methods for a Nonaffiliated Candidate

Candidates who are not a member of any political party may file for a partisan or nonpartisan office on the general election ballot by completing one of two processes:

→ Individual Electors

A nomination by individual voters involves obtaining the required number of valid signatures from registered voters

or

→ Assembly of Electors

An Assembly of Electors involves a gathering of registered voters in one place at one time to nominate candidates to partisan office.

### Individual Electors

*ORS 249.740*

To be nominated by individual electors, a candidate must submit the required number of valid signatures from active Oregon registered voters in the district where the candidate is running for office.

#### 1 File a Prospective Petition

Prior to obtaining any signatures candidates must file the following forms to begin the signature sheet approval process:

 Form SEL 114 Candidate Filing – Individual Electors marked Prospective Petition, designating circulator pay status

and


 SEL 122 Candidate Signature Sheet – Individual Electors with all fields completed.

 See Signature Sheet Requirements on page 28.

#### 2 Receive Approval to Circulate

If the form is complete, the elections official will give written approval that includes:

- petition number;
- number of signatures required; and
- filing deadline.

 All signature sheets must be approved in writing by the elections official before circulating. Failure to do so will result in the rejection of the signature sheets.

#### 3 Gather Petition Signatures

Once the petition has been approved to circulate, but before collecting any signatures, a candidate must review with all circulators the legal requirements and guidelines for circulating the candidate nominating petition.

 See Guidelines for Circulation on page 29.

 Violations of certain circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. *ORS 260.715 and 260.993*

After reviewing the legal requirements and guidelines for circulating the nominating petition, a candidate may begin gathering signatures.



Failure to comply with the legal requirements will result in the rejection of those sheets.

A candidate is advised to obtain more than the required number of signatures to ensure the petition has a sufficient number of valid signatures.

#### 4 Complete the Petition

Allow sufficient time for the verification process to be completed prior to the filing deadline.

Before submitting signature sheets for verification, the candidate must:

- ensure each signature sheet certification is signed and dated by the circulator; and
- sort the signature sheets by county, if required;

#### 5 Signature Verification

To complete the petition process a candidate must file with the appropriate elections official:



Form SEL 338 Petition Submission – Candidate, Voters’ Pamphlet;

and

- the signature sheets that contain at least 100% of the required number of signatures.

The elections official reviews each signature sheet to ensure that sheets are sorted by county if required and that the circulator’s certification is sufficient. After reviewing the signature sheets the elections official tabulates the number of valid signatures contained on the accepted signature sheets.



If the elections official determines the petition does not contain the required number of valid signatures and the filing deadline has not passed, the candidate may submit additional signatures.

### Assembly of Electors

*ORS 249.735-249.737*

An Assembly of Electors is a nominating convention of active Oregon registered voters who gather in one place, on a single day during a single 12-hour period. A presiding officer conducts the assembly, and the assembly secretary records nominations in the minutes. The minutes also include the signatures of the assembly participants. Those signatures are submitted to the elections official.



The presiding officer must coordinate the date, time, and place of the assembly with the elections official, so elections staff can attend and supervise the nominating convention.



See the [Filing Requirements](#) section for a list of required signatures and the deadline to submit completed forms.

#### 1 File a Prospective Petition

The candidate or presiding officer must file:

Form SEL 115 Candidate Filing – Assembly of Electors, leaving the Assembly of Electors portion on the second page of the form blank, that portion will be completed after the assembly is conducted.

and



SEL 116 Candidate Signature Sheet – Assembly of Electors with all fields completed.



See Signature Sheet Requirements on page 28.

## 2 Determine the Logistics for the Assembly

The candidate or presiding officer must coordinate with the elections official to:

- determine a mutually convenient time to conduct the assembly and
- review assembly requirements.

## 3 Receive Approval to Schedule the Assembly


If the form is complete, the Elections Division will give written approval to schedule the Assembly of Electors.

## 4 Publish a Notice of Assembly

Next, the candidate or presiding officer must publish a notice of the Assembly of Electors at least once, in at least three newspapers of general circulation in the electoral district for which the assembly will nominate a candidate.


The notice must contain:


- the time and place of the assembly;
- the office or offices for which nominations will be made; **and**
- the names and addresses of at least 25 active Oregon registered voters who want to have the assembly and who are eligible to participate;

 Before publishing the notice, the candidate or presiding officer must submit the 25 names to the elections official to confirm that they are active registered voters.

## 5 File the Notice of Assembly

To receive final approval to convene the assembly, the candidate or presiding officer must file a copy of the published notice with elections official.


 The candidate or presiding officer must publish the notice and file it with the elections official no later than ten days before the nominating convention. [ORS 249.735\(3\)](#).

 If the published notice is not filed on time or does not meet the requirements described above, the Assembly of Electors will be cancelled. The candidate or presiding officer may reschedule the assembly in coordination with the elections official and may hold the assembly once all the requirements are met.

## 6 Get Affidavits to Prove the Notice was Published

The candidate or presiding officer must get an affidavit from each of the newspapers where the notice is published, to prove that the notice was published, as required. Each affidavit should attach to a copy of the notice and be signed by one of the following:

- the newspaper's owner; **or**
- the newspaper's editor; **or**
- the newspaper's publisher; **or**
- the newspaper's manager; **or**
- the newspaper's advertising manager; **or**
- the principal clerk of the owner or editor or manager; **or**
- the newspaper's printer or the printer's foreperson.

 The candidate or presiding officer should not submit the affidavit with the filed notice. They should keep it and submit it to the elections official when they file the completed petition after the Assembly of Electors. [ORS 249.735 \(4\)](#)

### 7 Receive Approval to Hold the Assembly

Once the candidate or presiding officer files a copy of the published notice (see Step 5, above), the elections official will review it for completeness. If complete, the elections official will give approval, in writing, to hold the Assembly of Electors. The approval document will include:

- the petition number; and
- the number of required signatures; and
- the filing deadline; and
- a signature sheet template, to use for gathering signatures.

### 8 Hold the Assembly of Electors

The presiding officer is advised to invite more than the required number of participants, to ensure that the minutes include enough valid signatures from active voters. After starting the assembly, the presiding officer must explain that:

- the nominating convention is held in one day in one location and is completed within 12 hours or the process must begin again;
  - the assembly participants must be active Oregon registered voters within the electoral districts from which the assembly is nominating candidates;
  - the assembly may only nominate candidates for offices published in the notice;
  - the candidate who receives the highest number of votes for an office will be the assembly's nominee for that office;
  - only assembly participants who are active registered voters may sign the signature sheets;
- and**
- once the required number of active registered voters are present to participate, they must remain in the assembly until candidates have been nominated, signature sheets are signed, and the convention is adjourned.

### 9 Filing a Vacancy in Nomination(s)

If a vacancy in nomination occurs, it may be filled in one of the following ways:

- The presiding officer may reconvene the assembly following the same rules as the original assembly. **or**
- The original assembly must vote to appoint the committee to whom the assembly will delegate the authority to fill vacancies. A committee designated by the original assembly may select a nominee to fill the vacancy. The assembly is considered the same assembly if the presiding officer and secretary are the same as during the original assembly. The committee only has the authority to select a nominee to fill the vacancy if the petition has the required number of signatures.

The presiding officer, or the committee, must file with the elections official a certificate of nomination designating the nominee to fill the vacancy.





The vacancy must be filled no later than the 70th day before the general election, August 25, 2026.

## 10 Adjourn the Assembly of Electors

After the assembly has completed the nomination process and selected the committee to fill vacancies, if any, the assembly is adjourned. The elections official collects all completed signature sheets and stamps each sheet under the last signature line signed to ensure no additional signatures are added. The signature sheets will be returned to the presiding officer.

## 11 Complete the Petition, Signature Verification

To complete the petition process the candidate or presiding officer must submit to the elections official:

-  Notarized form [SEL 115 Candidate Filing – Assembly of Electors](#) with the Certificate of Nomination executed by the presiding officer and secretary of the assembly;
  -  The Certificate of Nomination may be executed and notarized on a copy of the [SEL 115](#) originally submitted. If executed and notarized on a new [SEL 115](#), all sections of the form must be completed in their entirety.
- signature sheets that contain at least 100% of required number of signatures;
- and**
- proof of published notice affidavit(s).

The candidate or presiding officer submits signature sheets to the appropriate county elections official for verification allowing sufficient time for the verification process to be completed prior to the filing deadline.

The county elections official verifies the signatures against the voters' registration record.

## 12 Signature Tally

The elections official tabulates the number of valid signatures contained on the accepted signature sheets and notifies the candidate and presiding officer of the final tally.

# Nonpartisan Office – County

ORS 249.031

In a county nonpartisan race, a candidate does not run as a member of a political party.

County nonpartisan offices include County Assessor, County Auditor, County Clerk, Sheriff, County Treasurer, County Surveyor, Justice of the Peace, and County Judge; it may also include County Commissioner.

ORS 249.002.

Check with the County Clerk for specific qualifications.

## Qualifications

All Candidates must be US Citizens and Registered Voters

Office	Age	Residency	Term of Office	Special Requirements	Vacancies
<b>Assessor</b>	18	Resident of county one year prior to election ORS 204.016	4 years ORS 204.010	The candidate must be a registered appraiser or an appraiser trainee; have two years accounting experience or two years employment in an appraiser’s office; and be certified to be eligible by the Dept. of Revenue. ORS 204.016(4)(5)	County governing body appoints qualified person to serve until successor is elected ORS 236.210
<b>Auditor</b>	18	Resident of county one year prior to election	4 years	Auditor must be a registered CPA	County governing body appoints qualified person to serve until successor is elected ORS 236.210
<b>Clerk, Treasurer</b>	18	Resident of county one year prior to election ORS 204.016	4 years OR Const., Art VI, §6		County governing body appoints qualified person to serve until successor is elected ORS 236.210
<b>Sheriff</b>	21	Resident of county one year prior to election ORS 204.016	4 years OR Const., Art VI, §6	Proof of certification or eligibility for certification by the Department of Public Safety Standards and Training must be provided to the filing officer no later than the 61 <sup>st</sup> day prior to the election. Exceptions may apply. ORS 206.015 (3) and (4)	County governing body appoints qualified person to serve until successor is elected ORS 236.210
<b>Commissioner</b>	18	Resident of county one year prior to election ORS 204.016	4 years ORS 204.010	This is a partisan office unless a county home rule charter or ordinance deems it nonpartisan. Contact the local elections official for further information.	County governing body appoints qualified person to serve until successor is elected ORS 236.215

*Continued on the next page*

# Qualifications

All Candidates Must be US Citizens and Registered Voters

Office	Age	Residency	Term of Office	Special Requirements	Vacancies
<b>Justice of the Peace</b>	18	Resident of state for 3 years, residence or office in district 1 year prior to appointment or becoming a candidate ORS 51.240	6 years	Be a licensee of the Oregon State Bar. ORS 51.240 If not a licensee of the state bar, must take 30 hours of continuing education every 2 calendar years ORS 51.245 Must retire at end of the calendar year in which the judge turns 75 OR Const., Art VII §1a	Governor appoints qualified person to serve until successor is elected ORS 51.260
<b>County Judge Who Exercises Judicial Functions</b>	No older than 75	Resident of county one year prior to election ORS 204.016	6 years	Must retire at end of the calendar year in which the judge turns 75 OR Const., Art VII §1a	Governor appoints qualified person to serve until successor is elected ORS 236.210
<b>County Judge without Judicial Functions</b>	18	Resident of county one year prior to election ORS 204.016	4 years		County governing body appoints qualified person to serve until successor is elected ORS 236.210
<b>Surveyor</b>	18	Resident of county one year prior to election ORS 204.016	4 years ORS 204.010	Must be registered as a professional land surveyor in the state. County residence requirement does not apply to counties of less than 25,000 population. ORS 204.016	County governing body appoints qualified person to serve until successor is elected ORS 236.210

*i* Qualifications for county, city, or district office may be governed by county or city charter or ordinance or district by-laws and are not provided. For those offices or any other office not listed in these tables, contact the local elections official for the qualifications.

# Filing Requirements


All filings and an accompanying payment of fees or verified signatures required to be filed, must be delivered to and actually received at the office of the designated officer not later than 5:00:00 pm on the applicable filing deadline.

	Primary Election	General Election	Regularly Scheduled District Election
<b>🕒 First Day to File</b>	September 11, 2025	June 3, 2026	February 6, 2027
<b>🕒 Last Day for Candidates to File (other than Elected Incumbents)</b>	March 10, 2026	August 25, 2026	March 18, 2027
<b>🕒 Last Day for Elected Incumbent Candidates to File</b>	March 3, 2026	August 18, 2026	March 11, 2027
<b>🕒 Last Day to Withdraw</b>	March 13, 2026	August 28, 2026	March 18, 2027
Office	Fee		
<b>Justice of the Peace</b>	No fee ORS 249.056 (2)		
<b>County Assessor, Auditor, Clerk, Commissioner, Judge, Sheriff, Surveyor, or Treasurer</b>	\$50 or the lesser of either 500 signatures or 1% of the number of votes cast in the district for Governor at the last election at which the Governor was elected to a full term.		

*i* Contact the local elections official for applicable charter or ordinance provisions that may supersede this information.

## Filing Methods for a Nonpartisan Office Candidate

ORS 249.020

 A person may only file for one lucrative office at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. ORS 249.013

### Filing by Fee

ORS 249.056

A candidate files form SEL 101, and pays the required filing fee, if any. See Filing Requirements above.

### Filing by Petition




ORS 249.008, 249.020, 249.031, 249.035, and 249.061-249.076

The following information provides instructions on collecting and submitting sufficient valid signatures to place the candidate's name on the ballot.

 Violations of certain circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. ORS 260.715 and 260.993

### Prospective Petition


Prior to obtaining any signatures, candidates must file the following forms to begin the signature sheet approval process:

-  SEL 101 Candidate Filing-Major Political Party or Nonpartisan marked "Prospective Petition" **and**
-  SEL 121 Candidate Signature Sheet – Nonpartisan.
-  See Signature Sheet Requirements on page 28.

### Approval to Circulate

After receiving the required forms, the elections official reviews for required information and if complete will provide written approval to circulate the prospective nominating petition that includes:

- petition number, number of signatures required, and filing deadline.

 All signature sheets must be approved in writing by the elections official before circulating. Failure to do so will result in the rejection of the signature sheets.

### Required Signatures

County nonpartisan candidates must have the lesser of either:

- 500 signatures **or**
- 1% of the number of votes cast in the electoral district for governor.

A nonpartisan candidate may obtain signatures from any active Oregon registered voter in the county, regardless of political party affiliation.

### Complete Filing

To complete the filing process a candidate must:

- 1 ensure each signature sheet certification is signed and dated by the circulator;
- 2 submit the signature sheets to the county elections official for verification allowing sufficient time for the verification process to be completed prior to the filing deadline; **and**
- 3 file the signature sheets with the Form SEL 338 Petition Submission – Candidate, Voters' Pamphlet.

# City Candidates

City candidates may file with the city elections office by paying a filing fee or by a petition containing signatures.

The city elections official will verify qualification for a candidate prior to their name being placed on the ballot. If the candidate does not qualify for the position, the filing will be rejected and any fees will be refunded.

Qualifications and requirements set by city charter or ordinance may differ from state statutes. For more information and specific requirements, contact the city elections official before filing.

## Filing Requirements

All filings and an accompanying payment of fees or verified signatures required to be filed, must be delivered to and actually received at the office of the designated officer not later than 5:00:00 pm on the applicable filing deadline.

	Primary Election	General Election
<b>First Day to File</b>	September 11, 2025	June 3, 2026
<b>Last Day for Candidates to File</b> <i>(other than Elected Incumbents)</i>	March 10, 2026	August 25, 2026
<b>Last Day for Elected Incumbent Candidates to File</b>	March 3, 2026	August 18, 2026
<b>Last Day to Withdraw</b>	March 13, 2026	August 28, 2026
<b>Office</b>	<b>Fee</b>	<b>Required Signatures</b>
<b>City Office</b> Contact the local elections official to determine which election the office will appear on and for any applicable charter or ordinance provisions that may supersede this information.	Set by charter or ordinance <b>or</b>	The lesser of either 500 signatures or 1% of the number of votes cast in the district for Governor at the last election at which the Governor was elected to a full term.

## Filing Methods for City Candidates

A person may only file for one lucrative office at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. [ORS 249.013](#)

### Filing by Fee

*ORS 249.056*

A candidate must file the following with the city elections office:

- Form SEL 101 Candidate Filing – Major Political Party or Nonpartisan **and**
- pay the required filing fee, if any.

City candidate filing fees may be set by a city charter or ordinance. Check with your city elections official for more information.

### Filing by Petition

*ORS 249.008, 249.020, 249.031, 249.035, and 249.061-249.076*

All signatures must be from active Oregon registered voters within the district.

A candidate must allow sufficient time for signatures to be verified before the filing deadline.

Violations of certain circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. [ORS 260.715](#) and [260.993](#)

The following forms must be completed and filed with the city elections office:



SEL 101 Candidate Filing – Major Political Party or Nonpartisan marked “Prospective Petition”

and



SEL 121 Candidate Signature Sheet – Nonpartisan.



See Circulator and Petition Sheet Requirements on page 28.

### Approval to Circulate

After receiving the completed forms the elections official reviews for required information and if complete will provide written approval to circulate the prospective nominating petition that includes:

- petition number;
- number of signatures required; and
- filing deadline.



All signature sheets must be approved in writing by the elections official before circulating. Failure to do so will result in the rejection of the signature sheets.

### Required Signatures

A candidate is advised to obtain more than the required number of signatures to ensure the petition contains a sufficient number of valid signatures.

City candidate must have the lesser of either:

- 500 signatures **or**
- 1% of the votes cast in the electoral district for all candidates for Governor at the last election where the Governor was elected to a full term.

City charter or ordinance may have different requirements.

### Complete Filing

To complete the filing process a candidate must:

- 1 ensure each signature sheet certification is signed and dated by the circulator;
- 2 submit the signature sheets to the city elections official for verification allowing sufficient time for the verification process to be completed prior to the filing deadline; **and**
- 3 file the signature sheets with Form SEL 338 Petition Submission – Candidate, Voters’ Pamphlet.

### Signature Verification

The city elections official will review signature sheets for sufficient circulator certification.

The city elections official will submit the signatures to the county elections official for signature verification.

The county elections official will:

- verify the signatures against the voters’ current registration record **and**
- return the certified signature sheets to the city elections official.

The city elections official will notify the candidate of the results of the signature verification. If it is determined that there are not enough valid signatures and the filing deadline has not passed, the candidate may submit additional signatures.

# District Candidates

ORS 255.235

For special district positions, the filing officer is the County Elections Official of the county where the administrative office of the district is located.

District candidates may file with the county elections official by paying a filing fee or by petition to obtain signatures.

## Qualifications for District Offices

Contact the Elections Division for what procedures apply to candidates for a newly created district board. Before filing for district office, a candidate should contact the county elections official to review the statutory requirements for the office sought.

Special district statutory requirements may differ from general state elections requirements.

Soil and Water Conservation District candidates must contact the Oregon Department of Agriculture for information related to filing for candidacy.

Regular district elections to elect district board members are held at the May election in each odd-numbered year. For more information and specific requirements, contact the county elections official before filing.

Candidates for Metropolitan Service District (MSD) offices must follow the same process as state and county nonpartisan candidates.

## Filing Requirements for District Offices


**Contact the appropriate county elections official to ensure all statutory requirements are met.**

All filings and an accompanying payment of fees or verified signatures required to be filed, must be delivered to and actually received at the office of the designated officer not later than 5:00:00 pm on the applicable filing deadline.

	Primary Election	General Election	Regularly Scheduled District Election
<b>First Day to File</b>	January 29	July 16	February 6, 2027
<b>Last Day for Candidates to File</b> <i>(other than Elected Incumbents)</i>	March 10, 2026	August 25, 2026	March 18, 2027
<b>Last Day for Elected Incumbent Candidates to File</b>	March 3, 2026	August 18, 2026	March 11, 2027
<b>Last Day to Withdraw</b>	March 10, 2026	August 25, 2026	March 18, 2027
<b>Office</b>	<b>Fee</b>	<b>Required Signatures</b>	
<b>District Office</b> District board members are elected at the regular district election in May of each odd-numbered year.	\$10	or the lesser of either 25 signatures or 10% of the total number of active registered voters in the district.  Contact the local elections official for any applicable by-laws that may supersede this information.	

No person may be a candidate for more than one position on the same district board to be filled at the same election. ORS 249.013


## Filing Methods for District Candidates

 A person may only file for one lucrative office at the same election. Unless the person has withdrawn from the first filing, all filings are invalid. [ORS 249.013](#)

### Filing by Fee

*ORS 249.056*

A candidate will file:

-  Form SEL 190 District Candidate Filing form
- and**
- The appropriate filing fee.

### Filing by Petition

*ORS 249.064, 249.076, 255.012, 255.235*



A candidate must allow sufficient time to have the signatures verified before the filing deadline. A candidate nominating petition for a district candidate is not approved by the county elections official prior to circulation. Instead, the district candidate uses the following signature sheet to gather signatures:

-  Form SEL 121 Candidate Signature Sheet – Nonpartisan
-  See Circulator and Petition Sheet Requirements on page 28.

 Violations of certain circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. [ORS 260.715](#) and [260.993](#)

### Complete Filing

To complete the filing process a candidate must:

- 1 obtain the required number of signatures, although obtaining more than the required number may help to ensure the petition contains a sufficient number of valid signatures;
  - 2 ensure each signature sheet certification is signed and dated by the circulator;
- and**
- 3 submit the signature sheets to the appropriate county elections official for signature verification along with:
    -  Form SEL 190 Candidate Filing – District
    - and**
    -  Form SEL 338 Petition Submission – Candidate, Voters’ Pamphlet.

### Signature Verification

The county elections official reviews signature sheets for sufficient circulator certification and verifies the signatures against the voters’ current registration record.

# Write-In Candidates

ORS 254.548

Oregon voters have the option of writing in the name of a candidate for any office instead of voting for a candidate printed on the ballot. Write-in votes are tallied together with a lump sum recorded for each office unless there is no candidate on the ballot, or the total number of write-in votes exceeds the candidate with the most votes.

A candidate seeking nomination or election to office by write-in does not complete any candidate filing forms but must qualify for the office and may be required to establish a campaign account and file a Statement of Organization designating a candidate committee.

 See the [Campaign Finance Manual](#) and the [ORESTAR User’s Manuals](#) available at [www.oregonvotes.gov](http://www.oregonvotes.gov).

Prior to sending a notification to any person who is nominated or elected by write-in, the filing officer will conduct a review of the qualifications of the office. If the person who received the most votes does not qualify for the position, the office becomes vacant.

If any individual is nominated or elected by write-in votes, the procedures for accepting the nomination of office are explained in the following sections.

## Notification

The elections official notifies the candidate by sending:

 Form [SEL 141 Write-In Candidate Acceptance](#)

## Acceptance of Nomination or Office

To accept the nomination or office, the candidate completes, signs, and returns form [SEL 141](#) to the elections official.

### Certificate of Nomination or Election

Upon receipt of the completed and signed [SEL 141](#) the elections official prepares and delivers a certificate of nomination or election to the candidate and if applicable, issues a proclamation of election.

 **Deadline to Complete Write-In Process**

	Precinct Committeeperson	Primary Election	General Election	District Election
<b>Notification</b>	June 15, 2026	June 26, 2026	December 11, 2026	June 25, 2027
<b>Acceptance</b>	June 22, 2026	July 1, 2026	December 16, 2026	June 30, 2027
<b>Certificate</b>	June 23, 2026	July 6, 2026	December 18, 2026	July 2, 2027

## Vacancy

The procedures for the filling of vacancies in an elective public office or nomination are dependent on the office. A **vacancy in nomination** occurs when a candidate on the ballot becomes disqualified or dies (a candidate may only withdraw from the ballot after they have filed and up to the specified deadline for withdrawal). A **vacancy in office** occurs when the current office holder resigns, is recalled, becomes disqualified or dies.

For local elective public offices, the vacancy procedures are under the authority of the local jurisdiction and the Secretary of State, Elections Division does not generally provide advice or resolve disputes about those procedures. The Secretary of State, Elections Division has a role **only** in the vacancy procedures for **state offices**. These procedures differ depending on whether the public office is partisan or nonpartisan and also differ for specific offices within those categories.

A vacancy in office may occur at any time during the term of office, even before the person takes the oath of office or before the term ends.

- The processes for filling a vacancy are dependent upon the type of office and when the vacancy occurred, not why the vacancy occurred.
- Reasons for vacancies may include death, resignation, disqualification, or recall.
- [ORS 236.320](#) provides that resignations for public office shall be in writing and filed with the appropriate filing officers.

The Oregon Constitution, Oregon Revised Statutes, and Oregon Administrative Rules have applicable sections regarding vacancies. The Oregon Constitution and Oregon Revised Statutes can be searched [here](#). The search can be narrowed by using the ORS General Index. Oregon Administration Rules are found [here](#).

## Petition Guidelines and Requirements

The guidelines and requirements for producing and circulating candidate nominating petition signature sheets are explained in the following sections.


### Official Signature Sheets

*ORS 249.031, 249.061, and 249.064*

Local candidates must use approved signature sheet forms to collect signatures. Candidate nominating petitions cannot be circulated using an electronic signature sheet.

Signature sheets must be submitted for approval exactly as intended to circulate, including weight, style, and color of paper. Official signature sheets include:

- Form SEL 102, Candidate Signature Sheet – Major Party
- Form SEL 116, Candidate Signature Sheet – Assembly of Electors
- Form SEL 121, Candidate Signature Sheet – Nonpartisan
- Form SEL 122, Candidate Signature Sheet – Individual Electors

 Any proposed variation to the approved signature sheet must be resubmitted and approved in writing by the elections official before circulating.

### Signature Sheet Requirements

Each signature sheet must meet the following formatting requirements:

- standard 8½ x 11 size paper or equivalent;
- at least 20 pound uncoated paper or equivalent; **and**
- printed on white or colored paper stock to enable elections officials to readily verify signatures.

 Forms are available online at [www.oregonvotes.gov](http://www.oregonvotes.gov).

## Guidelines for Circulation

ORS 249.061

To ensure compliance with circulating requirements, candidates must educate circulators on the guidelines for circulating and monitor their activities.

### Circulator Requirements

Each circulator must:	What this means:
→ personally witness each signature collected;	<ul style="list-style-type: none"> <li>✓ Watch the person sign the petition.</li> <li>ⓘ It is not sufficient to merely be present in the same room or vicinity.</li> </ul>
→ complete the circulator certification after witnessing all signatures collected on a sheet; and	<ul style="list-style-type: none"> <li>✓ Sign the certification using a legal signature.</li> <li>ⓘ A legal signature is defined as a signature possessing obvious and predominantly matching characteristics to signatures on file from a paid circulator’s registration, signatures in the Oregon voter registration file, or the signature on an official government document.</li> <li>ⓘ Initials, signature stamps, illegible or printed script are not sufficient unless verified by exemplar.</li> </ul>
→ provide the date when the certification was signed.	<ul style="list-style-type: none"> <li>✓ The date must be provided in month, day, year order if written in all numbers.</li> </ul>



A circulator’s failure to comply with these requirements may result in the rejection of the petition signature sheets and a felony conviction for the circulator.

### Circulator Prohibitions



It is against the law for circulators to knowingly:

- circulate a petition containing a false signature;
- attempt to obtain the signature of a person who is not qualified to sign the petition;
  - ⓘ Only active Oregon registered voters may sign a petition.
- make false statements to any person who signs the petition or requests information about it;
- offer money or anything of value to another person to sign or not sign the petition;
- sell or offer to sell signature sheets; or
- write, alter, correct, clarify or obscure any information about the signers unless the signer initials after the changes are made.
  - ⓘ A circulator may assist a disabled signer who requests assistance in completing their printed name, address and date signed. In such a case, no initials are required.



Violations of the circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. ORS 260.715 and 260.993


## Signer Requirements

Each petition signer must:	What this means:
<b>All Petition Types</b>	
<ul style="list-style-type: none"> <li>→ Signers should provide an original signature and should be encouraged to provide their printed name and date signed.</li> <li> These informational fields, while optional unless otherwise noted below, provide valuable assistance when verifying signatures.</li> <li> Signers must include printed name for Nomination by Assembly of Electors and for Major Party Presidential Candidates.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Signers must sign the petition using a signature contained in their voter registration record.</li> </ul>
<ul style="list-style-type: none"> <li>→ Signers should be an active registered voter at the time of signing the petition in the candidate’s electoral district.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Information in the voter's registration record is up to date, and they would be able to vote for the candidate.</li> </ul>
<ul style="list-style-type: none"> <li>→ Sign a petition sheet that is designated for their county of residence, if applicable.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Signers should sign a petition sheet designated for the county in which they are registered to vote.</li> </ul>
<ul style="list-style-type: none"> <li>→ Provide a residence or mailing address.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Signers should provide the address at which they are registered to vote.</li> </ul>
<b>Nominating Petition Only</b>	
<ul style="list-style-type: none"> <li>→ At the time of signing the petition, signers are encouraged to include the signer’s precinct name or number.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Signers are encouraged to provide precinct information.</li> </ul>
<b>Major Party Petition Only</b>	
<ul style="list-style-type: none"> <li>→ At the time of signing the petition, the signer should be a member of the same political party as the candidate.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Information in the voter's registration record is up to date, and they would be able to vote for the candidate at a primary election.</li> </ul>

## Signature Date

If no date is provided by the signer, the signature is only considered valid if the signer:


- ✓ was an active Oregon registered voter between the date the petition was approved to circulate and the circulator’s certification date; or
- ✓ was originally registered to vote on or after the date the petition was approved to circulate and was an active registered voter between their original registration date and the circulator’s certification date.

 This standard also applies to any signer that provides a date of birth or a date that at the time of verification has not yet occurred instead of the date they signed the petition.

## Signer Prohibitions

It is against the law for signers to knowingly:


- sign another person’s name under any circumstances;
- sign a petition more than one time; or
- sign a petition when not qualified to sign it.

 Only active Oregon registered voters may sign a petition. If the signer is not registered to vote or an active voter the signature will be rejected unless a completed registration card is received by a designated voter registration agency or an elections filing officer before 5:00:00 pm the day the petition is signed or 11:59:00 pm if completed electronically online at [www.oregonvotes.gov](http://www.oregonvotes.gov).

## Certification of Signature Sheets




*OAR 165-014-0270*

After all signatures on a signature sheet have been collected, circulators complete the certification by signing their legal signature and providing the date when the certification was signed. A legal signature is defined as a signature possessing obvious and predominantly matching characteristics to signatures on file from a paid circulator’s registration, signatures in the Oregon voter registration file, or the signature on an official government document.




 If the circulator certification is not completed or determined to be insufficient the signature sheet will be rejected.

Prior to submission to elections officials the circulator may correct the following defects:

### Circulator Signature Defects



If the circulator has:	Then the circulator should:
→ signed using only initials;  Unless verified by exemplar.	✓ sign and re-date certification with legal signature;
→ signed using a signature stamp;  Unless approved under ORS 246.025.	✓ re-sign and re-date certification with legal signature;
→ signed using an illegible signature;  Unless verified by exemplar.	✓ re-sign and re-date certification with legal signature;
→ photocopied or carbon copied the certification; or	✓ sign and re-date certification with legal signature; or
→ signed in a manner that the signature, printed name, and address are all illegible;	✓ re-sign and re-date certification with legal signature.

### Certification Date Defects

If the date is:	Then the circulator should:
→ missing;	✓ re-sign and date <b>or</b> date and initial correction;
→ crossed out;	✓ re-sign and re-date <b>or</b> re-date and initial correction;
→ overwritten with a different date;	✓ re-sign and re-date <b>or</b> re-date and initial correction;
→ earlier than all petition signers;  Unless the circulator and the only signer are the same person.	✓ re-sign and re-date <b>or</b> re-date and initial correction;
→ earlier than some, but not all petition signers;  Only those signatures dated on or before the date of the certification will be accepted.	✓ re-sign and re-date <b>or</b> re-date and initial correction;
→ partial or ambiguous; or	✓ re-sign and re-date <b>or</b> re-date and initial correction; or  Date must be provided in month, day, and year order if written in all numeric characters.
→ obscured in any way by white out or other correction fluid or adhesive tape.	✓ re-sign and re-date <b>or</b> re-date and initial correction.

The following defects in the circulator certification cannot be corrected and any signature sheet submitted that contains one of these defects will be rejected:

### Incurable Defects


- the original signature of a circulator has been crossed out, and a different circulator's signature is inserted;
  -  Does not apply if the original signature is that of an individual whose signature appears on the same signature sheet as a signer.
- two individuals sign and date as circulator; or
  -  Does not apply if the only signers and the circulators are the same people.
- white-out or other correction fluid or adhesive tape appears on the signature line.

## Guidelines for Completing Candidate Filing Forms

*ORS 249.031*

Failure to provide information for each of the required fields may result in rejection of the candidate filing.

If any of the required information is incomplete or insufficient, the filing officer will notify the candidate by phone, or in writing, including by email, of the deficiencies on the forms. The filing will not be processed or considered filed until the required information is provided.

 Providing false statements on filing forms is a violation of Oregon Election Law and the candidate may be convicted of a Class C Felony. *ORS 260.715(1) and 260.993*

Counties may create an electronic version of Candidate Filing Forms. The electronic version of Candidate Filing Forms must contain the required information listed in the statute and have the same components as the PDF version posted on [oregonvotes.gov](http://oregonvotes.gov).

### Residence Address Exemption Request

Candidates for public office must provide their residential address for elections officials to confirm that candidates and elected officials reside in the appropriate district and/or jurisdiction.

However, a candidate may choose to limit the public accessibility of candidate's residence address from the filing form and a list of electors delivered under *ORS 247.940* or *247.945*. Candidates wanting to exempt their residence address from public disclosure must complete and file the following form:

 [SEL 180 – Residence Address Exemption Request](#)

This exemption does not apply to precinct committeeperson or candidates for that office.

Candidates who choose to exempt their residence address from disclosure must provide a publicly disclosable mailing address.

The ballot for each election will be sent to the publicly disclosable mailing address provided by the candidate.


The Elections Official will make all efforts to review the request for exemption within five (5) business days.

If the exemption is granted, it is effective until the person is no longer a candidate; candidate was not elected to the public office; candidate ceases to hold public office.

To terminate the exemption early, submit a written request to the Elections Official.

The publicly disclosable mailing address listed on Residence Address Exemption Request will be used as the mailing address on the candidate filing if the exempt residence address is used as the mailing address on the filing.

The residence address of a candidate is still subject to inspection as a public record, under *ORS 192.311* to *192.478*, only to a person who has filed a written public records request.

 Forms are available online at [www.oregonvotes.gov](http://www.oregonvotes.gov).

# Candidate Filing Form

## Original or Amendment

May indicate if the filing is an Original filing or an Amendment that is changing information prior to the filing deadline.

## Office Information

Complete the following information.

- **Filing for Office of:** Must indicate the office the candidate is filing for.
- **District, Position or County:** Must indicate the district, position or county of the office the candidate is filing for except when filing for countywide offices.
- **Incumbent:** Must indicate whether the candidate is the current office holder seeking reelection for an additional term by selecting “No” or “Yes”.
- **If Incumbent:** Must indicate whether the candidate is Elected or Appointed Incumbent.

Section 17b of House Bill 4024 (2024) changed the candidate filing deadline for incumbent public office holders. An incumbent seeking re-election to the same office must file their declaration of candidacy or nominating petition at least seven days before the applicable filing deadline for non-incumbent candidates. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.

## Candidate Information

Complete the following information:

- **Name of Candidate:** Must include at least the first and last name. This should be the candidate’s full name (first, middle initial (if applicable) and last). If filing online through ORESTAR, this field is automatically populated from the user profile and cannot be modified.
- **How Name Should Appear on Ballot:** Must include how the candidate wishes their name to appear on the ballot. If a nickname is used in connection with the candidate’s full name, the nickname should be in parentheses. Titles and designations (e.g., Dr., CPA) should not be included as they cannot appear on the ballot.
- **Candidate Residence Address:** Residential address of the candidate, including the county, must be provided
- **Mailing Address for Candidate Correspondence:** Must include the address where the candidate wishes to receive correspondence from the elections official.



Do not use an address included on a non-disclosure order on file. A publicly disclosable mailing address listed on the non-disclosure request will be used as the mailing address on the candidate filing if the exempt residence address is used as the mailing address on the filing.

- **Contact Information:** Enter valid phone number where the candidate can be reached during normal business hours, fax, email address, and website, if applicable.

The following are guidelines to complete the required fields of occupation, occupational background, educational background, and prior governmental experience on the candidate filing forms. These fields are required and information provided must be accurate. Not every occupational, educational, or prior governmental experience is required to be provided, but what is listed must be accurate. If the candidate has no relevant experience, “None” or other equivalent must be entered.

## Occupation and Occupational Background

- **Occupation (present employment – paid or unpaid):** The current full- or part-time employment or other line of work, business, craft, or professional information (not required to indicate whether paid or not paid). If not employed, enter “Not Employed”, or “None”, or other equivalent.
- **Occupational Background (previous employment – paid or unpaid):** Previous full- or part-time employment or other line of work, business, craft or professional information (not required to indicate whether paid or not paid).

## Educational Background

- **Educational Background (schools attended):** This may include schools attended by the candidate, including the last grade level completed, whether a diploma, degree or certificate was received, and the course of study. It is not required that every educational experience be listed, but what is listed must be accurate.
- **Educational Background (other):** Other educational experiences of the candidate.



A degree indicates a college, university or professional school has awarded a title upon the person for completion of a program of study. For this purpose, honorary degrees or degrees from "degree mills" should not be included under this requirement.

## Prior Governmental Experience

- **Prior Governmental Experience (elected or appointed):** The current or previous governmental experience, which refers to a person’s involvement in governmental activities, such as appointed boards and commissions, elected boards other elected or appointed public offices or organizations that are recognized by a governmental body. Full- or part-time, paid or unpaid, or volunteer experience may be included (not required to indicate whether paid or not paid). If the candidate has no prior governmental experience, enter “None” or other equivalent.

## Candidate Signature and Date Signed

## Additional Information Required

The following instructions are for fields on specific forms that are unique to that form.

### SEL 101 Candidate Filing – Major Political Party or Nonpartisan

#### Filing Method


Complete the following information.

- **Fee:** If paying a fee, may check this box.
- **Prospective Petition:** If collecting signatures in lieu of paying the filing fee, may check this box.
- **Some circulators may be paid:** When collecting signatures, circulator pay status must be disclosed. If circulators may be paid to gather the sufficient number of signatures, mark “Yes.” If circulators are volunteering their time to help collect signatures, mark “No.”

### SEL 110 Candidate Filing – Minor Political Party

#### Nomination Information

- **Which political party’s nomination are you accepting with this filing:** Must check the box for the party that is nominating the candidate and whose nomination the candidate is accepting.
- **Ballot Order:** Indicate whether the order of the parties will be in default order or in a specified order. If marking Specified, specify the order in the space provided. If a selection is not made, the party names will be printed in the default order specified on page 8.

 If the candidate previously filed a candidacy filing with the filing officer for the current election cycle, skip to the Candidate Nomination Certificate and Candidate Attestation on the form. If the candidate has **not** previously filed a candidacy filing with the filing officer for the current election cycle, fill out all remaining fields.

#### Candidate Nomination Certificate

Candidate filings by a minor party must be notarized prior to submission. The following fields must be completed.

- **Name of Minor Political Party:** Must include the name of the Minor Party nominating the candidate.
- **Printed Name of Minor Political Party Officer:** Must include the clearly printed name of the officer that signed the candidate filing form.
- **Signature of Minor Political Party Officer:** Must include the signature of one of the officers listed on the by-laws of the minor political party.
- **Date Signed:** Must include the date the officer of the political party signed the candidate filing form.

#### The following required fields are completed by the Notary Public.

- **State of Oregon, County of:** Include the name of the county in which the Notary Public is signing the notarization.
- **Subscribed and sworn to (or affirmed) before me on:** Include the date the Notary Public witnessed the Minor Political Party officer sign the candidate filing form.
- **Minor Political Party Officer’s Name:** Include the name of the Minor Political Party officer.
- **Notary Public of Oregon:** Include the signature of the Notary Public.

## SEL 114 Candidate Filing – Individual Electors

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- **Name of Chief Sponsor:** Must include the name of the candidate or other person interested in placing the candidate name on the ballot. This can be the candidate.

## SEL 115 Candidate Filing – Assembly of Electors

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### Assembly of Electors fields to complete.

- **Name of Person Submitting Certificate of Nomination:** Must include the name of candidate or a person designated as the presiding officer.
- **Address of Person Submitting Certificate of Nomination:** Must include the address of the candidate or the presiding officer named in the above field.
- **Signature of Presiding Officer:** Must include the signature of the candidate or the signature of the presiding officer of the assembly.
- **Printed Name of Presiding Officer:** Must include the clearly printed name of the presiding officer.
- **Signature of the Secretary:** Must include the signature of the candidate or the secretary of the assembly.
- **Printed Name of the Secretary:** Must include the signature of the candidate or the signature of the secretary of the assembly.

### The following required fields are completed by the Notary Public.

- **State of Oregon, County of:** Include the name of the county in which the Notary Public is signing the notarization.
- **Subscribed and sworn to (or affirmed) before me on:** Include the date the Notary Public witnessed the Minor Political Party officer sign the candidate filing form.
- **Minor Political Party Officer's Name:** Include the name of the Minor Political Party officer.
- **Notary Public of Oregon:** Include the signature of the Notary Public.

## SEL 141 Candidate Filing – Write-In Acceptance

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### Nomination or Election

Must indicate whether the candidate is accepting a nomination or if the candidate won the election for this office.


### Office Information

Complete the following required information.

- **Filing for Office of:** Indicate the office for which the candidate is accepting the nomination.
- **District, Position or County:** If the office has a district number and/or a position number or the office covers an entire county, indicate that information in this field.

## Nomination Information

- **Party nomination(s) being accepted:** **Must** check the box for the party or parties that nominated the candidate by write-in at the Primary election and whose nomination the candidate is accepting.
- **Order of parties on ballot:** Indicate whether the order of the parties will be in default order or in a specified order. If marking Specified, specify the order in the space provided. If a selection is not made, the party names will be printed in the default order specified on page 8.

 If the candidate previously filed a candidacy filing with the filing officer for the current election cycle, skip to the signature line on the form. If the candidate has **not** previously filed a candidacy filing with the filing officer for the current election cycle, fill out the remaining fields.

## SEL 150 Candidate Filing – Withdrawal

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### Withdrawal from Candidacy or Nomination for Office Information

- **Office of:** Must indicate the office for which the candidate originally filed.
- **District, Position or County:** Must indicate the applicable district, position number, or county of the office for which the candidate filed.
- Must check the box to indicate the candidate is withdrawing from candidacy or nomination.
- **Withdrawal Reason:** In the box, must indicate why the candidate is withdrawing candidacy.

## SEL 190 Candidate Filing - District

---

### Office Information

Complete the following information

- **Filing for Office of:** Must indicate the office for which the candidate is filing.
- **District, Position or County:** Must indicate the district, position, or county of the office for which the candidate is filing.

### Filing Information

Must check the method used to file a completed form.

- Filing with the required \$10.00 fee or
- Prospective Petition, see the District Candidate section of this manual for the requirements for a candidate filing by petition.

## Other Forms

**Additional forms that may be necessary to file.**

### SEL 220 Statement of Organization for a Candidate Committee

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Please refer to the Campaign Finance Manual for further information about the SEL 220.

### PC 7 Certificate of Limited Contributions and Expenditures

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Please refer to the Campaign Finance Manual for further information about the PC 7.

### SEL 338 Petition Submission

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Form used to report the number of signatures submitted for verification on a candidate nominating petition.



## List of Forms

**SEL 101**

Candidate Filing – Major Political Party or Nonpartisan

**SEL 102**

Candidate Signature Sheet – Major Party

**SEL 105**

Candidate Filing – Precinct Committeeperson

**SEL 105D**

Write-in Declaration – Precinct Committeeperson

**SEL 105N**

Write-in Nomination – Precinct Committeeperson

**SEL 110**

Candidate Filing – Minor Political Party

**SEL 114**

Candidate Filing – Individual Electors

**SEL 115**

Candidate Filing – Assembly of Electors

**SEL 116**

Candidate Signature Sheet – Assembly of Electors

**SEL 180**

Residence Address Exemption Request

**SEL 121**

Candidate Signature Sheet – Nonpartisan

**SEL 122**

Candidate Signature Sheet – Individual Electors

**SEL 141**

Write-In Candidate Acceptance Form

**SEL 150**

Withdrawal – Candidacy or Nomination

**SEL 190**

Candidate Filing – District

**SEL 220**

Statement of Organization for a Candidate Committee

**SEL 338**

Petition Submission – Candidate Voters' Pamphlet

**PC 7**

Certificate of Limited Contributions and Expenditures

# Candidate Filing

## Major Political Party or Nonpartisan

**SEL 101**

rev 09/25  
ORS 249.031

Filing Dates		Candidate Filing		Candidate Withdrawal	
<b>Primary Election</b> <b>May 19, 2026</b>	First Day to File Last Day to File	September 11, 2025 March 10, 2026*			March 13, 2026
<b>General Election</b> <b>November 3, 2026</b>	First Day to File Last Day to File	June 3, 2026 August 25, 2026*			August 28, 2026

\*An incumbent seeking re-election to the same office must file their declaration of candidacy or nominating petition at least seven days before applicable filing deadline for non-incumbent candidates. Incumbent candidates that were appointed to the position they are seeking election to are subject to the same filing deadline as non-incumbent candidates.

**Filing Information**

This filing is an  Original  Amendment

**Office Information**

Filing for Office of:

District, Position or County:

Party Affiliation:  Democratic Party  Republican Party  Nonpartisan

Incumbent:  No  Yes      If Incumbent:  Elected\*\*  Appointed

**\*\*If you are an Elected Incumbent, you are subject to an earlier filing deadline!**

**Filing Method**

Fee

Office	Filing Fee	Office	Filing Fee
United States Senator	\$150	Justice of the Peace	n/a
United States Representative	\$100	County Office	\$50
Statewide Offices	\$100	City Office	Set by charter or ordinance
State Senator or Representative	\$25	MSD Executive Officer, MAD Director	\$100
Circuit Court, District Attorney	\$50	MSD Councilor	\$25

Prospective Petition, in lieu of filing fee      Some circulators may be paid  Yes  No

**Candidate Information**

**Name of Candidate**

First | MI | Last

**How you would like your name to appear on the ballot**

**Candidate Residence / Route Address**

Street Address | City | State | Zip | County

**Candidate Mailing Address and Contact Information** Only one phone number and an email is required.

Street Address or PO Box | City | State | Zip

Work Phone | Home Phone | Cell Phone

Email Address | Web Site, if applicable

**Race and Ethnicity** Optional

**Occupation (present employment)** If not employed, enter "Not Employed".

**Occupational Background (previous employment)** If no relevant experience, None or NA must be entered.

**Educational Background (schools attended)**

Complete name of School	Last Grade completed	Diploma/Degree/Certificate	Course of Study
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**Educational Background (other)** Attach a separate sheet if necessary.

**Prior Governmental Experience (elected or appointed)** If no relevant experience, None or NA must be entered.

**Campaign Finance Information** Not applicable to candidates for federal office.

A candidate must file a Statement of Organization not later than three business days of first receiving a contribution or making an expenditure and no later than the deadline for filing a nominating petition, declaration of candidacy, or certificate of nomination, whichever occurs first, unless they meet the criteria for an exemption. To meet the criteria, the candidate must serve as their own treasurer, not have an existing candidate committee, and not expect to spend or receive more than \$1,500 during the entire calendar year (including in-kind contributions and personal funds).

If you have an existing candidate committee you must amend the statement of organization not later than 10 days after a change in information. This includes changes to the election you are active in and the office you are running for.

See the [Campaign Finance Manual](#) for the procedural and legal requirements of establishing and maintaining a candidate committee.

**Residence Address Exemption**

To exempt your residence address from public disclosure, complete form [SEL 180 – Residence Address Exemption Request](#). The request for a Residence Address Exemption MUST include a publicly disclosable mailing address. See the Candidates Manual for further information.

I don't want my residence address to be disclosed. I will be filing a separate [SEL 180 – Residence Address Exemption Request](#).


**Candidate Attestation**

*By signing this document, I hereby state that:*

- I will accept the nomination for the office indicated above;
- I will qualify for said office if elected;
- All information provided by me on this form is true to the best of my knowledge; **and**
- No circulators will be compensated based on the number of signatures obtained by the circulator on a prospective petition

**For Major Political Party Candidates**

- if not nominated, I will not accept the nomination or endorsement of any political party other than the one named
- I have been a member of said political party, subject to the exceptions stated in ORS 249.046, for at least 180 days before the deadline for filing a nominating petition or declaration of candidacy (ORS 249.031). Does not apply to candidates filing for the office of US President.

 **Warning** Supplying false information on this form may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. (ORS 260.715). A person may only file for one lucrative office or not more than one precinct committee person at the same election. Unless the person has withdrawn from the first filing, **all** filings are invalid. (ORS 249.013 and ORS 249.170)

Candidate Signature


Date

# Candidate Signature Sheet | Nonpartisan

Petition ID \_\_\_\_\_

SOME Circulators  No Circulators for this petition are being paid.


This is a candidate nominating petition. Signers of this page must be active registered voters in the county listed.

 Signatures must be verified by the appropriate county elections official before the petition can be filed with the filing officer.

County \_\_\_\_\_

Candidate Information	
Name	Office
Election	District or Position Number (include city if applicable)

To the Elections Official/Filing Officer, We the undersigned voters, request the candidate's name be placed on the ballot at the election listed above for nomination to the office indicated.

 Signers must initial any changes the circulator makes to their printed name, residence address or date they signed the petition.

Signature	Date Signed mm/dd/yy	Print Name	Residence or Mailing Address street, city, zip code
-----------	----------------------	------------	---

1	_____
2	_____
3	_____
4	_____
5	_____
6	_____
7	_____
8	_____
9	_____
10	_____

**Circulator Certification** This certification **must** be completed by the circulator and additional signatures **should not** be collected on this sheet once the certification has been signed and dated! I hereby certify that I witnessed the signing of the signature sheet by each individual whose signature appears on the signature sheet, and I believe each person is a voter qualified to sign the petition (ORS 249.061). I also hereby certify that compensation I received, if any, was not based on the number of signatures obtained for this petition.

\_\_\_\_\_  
Circulator Signature

Date Signed mm/dd/yy

\_\_\_\_\_  
Sheet Number

Completed by  
Candidate

\_\_\_\_\_  
Printed Name of Circulator

Circulator's Address street, city, zip code

# Petition Submission

## Candidate, Voters' Pamphlet

**SEL 338**rev. 12/24  
OAR 165-010-0005, 165-016-0000

→ This form must be completed and filed with any submission of signatures.

Election Type			Year		
<input type="checkbox"/> Primary	<input type="checkbox"/> General	<input type="checkbox"/> Special Election	<input type="checkbox"/> 2024	<input type="checkbox"/> 2025	<input type="checkbox"/> 2026

Petition Information
Petition ID/Candidate's Name

Type of Filing	Number of Signatures Submitted
<input type="checkbox"/> Candidate Nominating	
<input type="checkbox"/> Voters' Pamphlet, Candidate	
<input type="checkbox"/> Voters' Pamphlet, Measure	

Candidate's Nominating/Voters' Pamphlet Filing
→ By signing this document, I hereby state that all information on the form is true and correct to the best of my knowledge.

Name	Contact Phone	Email Address
Signature	Date Signed	

Measure Argument Filing
→ By signing this document, I hereby state that all information on the form is true and correct to the best of my knowledge.

Name	Contact Phone	Email Address
Signature	Date Signed	

For office use only	
Submittal number	Number of signatures accepted
Is the petition complete? <input type="checkbox"/> Yes <input type="checkbox"/> No	Will there be additional submittals? <input type="checkbox"/> Yes <input type="checkbox"/> No

# Candidate Filing Withdrawal

**SEL 150**

rev 04/25

ORS 249.170, ORS 249.180 ORS 249.830, ORS 255.235

## Withdrawal Deadlines

<b>2026 Primary Election</b> March 13, 2026	<b>2026 General Election</b> August 28, 2026	<b>2027 District Election</b> March 18, 2027
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 All information must be completed, or the form will be rejected.

## Withdrawal from Candidacy or Nomination for Office Information

Office of:

District, Position or County:

 Withdrawal from Candidacy Withdrawal from Nomination: Please indicate below what party or parties you are withdrawing from: Constitution Democratic Independent Libertarian Pacific Green Progressive Republican Working Families

## Candidate and Nominee Information

### Name of Candidate

First

MI

Last

## Candidate Residence/Route Address

Street Address

City

State

Zip

## Candidate Mailing Address and Contact Information: Only one phone number and an email are required.

Street Address or PO Box

City

State

Zip

Work Phone

Home Phone

Cell Phone

Fax

Email Address (required)

Web Site, if applicable

## Withdrawal Reason (required)

I submit notice of withdrawal from candidacy or nomination to the above-named office. My reason for withdrawal is:

By signing this document, I hereby state that:

- I withdraw my candidacy or nomination for the office stated above **and**
- The reasons provided by me on this form for withdrawal are true.



### Warning

Supplying false information on this form may result in conviction of a felony with a fine of up to \$125,000 and/or prison for up to 5 years. (ORS 260.715).

Candidate's Signature

Date Signed

# Transaction Filing in ORESTAR “Quick Guide”



This “Quick Guide” is a summary of general campaign finance reporting guidelines and does not encompass all regulations and requirements. For all legal and procedural requirements refer to the Campaign Finance Manual.

More detailed information is available in the manuals listed below at [www.oregonvotes.gov](http://www.oregonvotes.gov). These manuals help a user navigate through ORESTAR committee registration and campaign finance reporting:

- ✓ The **Campaign Finance Manual** includes information about Oregon campaign finance regulations.
- ✓ The **ORESTAR User’s Manual: Statement of Organization** explains how to electronically file a Statement of Organization.
- ✓ The **ORESTAR User’s Manual: Transaction Filing** explains how to electronically file and amend transactions.


The Elections Division encourages all persons subject to campaign finance reporting requirements to read these manuals for guidance.

## If you need assistance:

Elections Division

255 Capitol St NE Suite 126

Salem OR 97310

 503 986 1518

fax 503 373 7414



[orestar-support.sos@oregon.gov](mailto:orestar-support.sos@oregon.gov)



[www.oregonvotes.gov](http://www.oregonvotes.gov)



1 866 673 VOTE/673 8683

se habla español

tty 1 800 735 2900

for the hearing impaired

## Transaction Types

There are six transaction types that must be disclosed under campaign finance reporting requirements. The two most commonly used types are Contribution and Expenditure. Other types of include: Other Accounts Receivable, Other, Other Receipt, and Other Disbursement. See the **ORESTAR User’s Manual: Transaction Filing** for instructions on how to add, save, file, and amend transactions in ORESTAR.

## When is a Committee Eligible to File a Certificate of Limited Contributions and Expenditures?

If a committee expects to receive a total of more than \$5,000 or spend a total of more than \$5,000 for a calendar year, the committee must file all transactions electronically using ORESTAR. If a committee does not expect to receive a total of more than \$5,000 or spend a total of more than \$5,000 in a calendar year, the committee may file a Certificate of Limited Contributions and Expenditures.



*If a committee has already entered or filed transactions electronically in the calendar year, a Certificate cannot be filed for that year; a Certificate must be filed prior to entering any transactions in ORESTAR.*



*Refer to **pages 14 – 15 of the Campaign Finance Manual** for the requirements to track all activity when a certificate is filed and what a committee must do if the \$5,000 threshold is exceeded **and** general information about reporting detailed transactions.*

## Committee Reporting Deadlines

ORESTAR automatically calculates transaction due dates. A transaction is due not later than 11:59:00 pm on the day of the deadline to file a transaction. Generally, a transaction is due not later than 30 calendar days after the date of the transaction, but there are some circumstances when a transaction is due not later than seven calendar days after the date of the transaction.



*Refer to **pages 21 – 24 of the Campaign Finance Manual for the “Schedule of Transaction Deadlines”** for Candidate, Political Action Committees and Petition Committees.*

## Contributions

- ✓ **Cash Contribution:** Includes cash, checks, or any legal instrument redeemable as currency, transmitted via physical or electronic means.
  - ! *Oregon Election Law requires you report the first and last name, address and occupational information for each individual contributor that is employed or self-employed. If Occupation information is not provided you must send an Occupation Letter requesting that information **within 7 days** of receiving the contribution and report the date the letter is sent when filing the transaction.*
- ✓ **In-Kind Contribution:** A good or service, other than money, having monetary value.
- ✓ **In-Kind/Forgiven Personal Expenditures:** Previously reported personal expenditures for reimbursement that are forgiven by the person who made the personal expenditures.
- ✓ **In-Kind/Forgiven Account Payable:** A previously reported account payable that is forgiven by the creditor.
- ✓ **Loan Received (Non-Exempt):** A loan from a source other than a financial institution. \* = REQUIRED FIELDS

<p><b><u>Cash Contribution</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Contribution</li> <li>* <b>Subtype:</b> Cash Contribution</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li><b>Description and/or Purpose</b></li> <li><b>Occupation Letter Date</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>In-Kind Contribution</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the committee first has knowledge that the In-Kind Contribution has occurred</li> <li>* <b>Type:</b> Contribution</li> <li>* <b>Subtype:</b> In-Kind Contribution</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li>* <b>Description and/or Purpose</b></li> <li><b>Occupation Letter Date</b></li> <li><b>Notes</b></li> </ul>
<p><b><u>In-Kind/Forgiven Personal Expenditures</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the Personal Expenditure is forgiven</li> <li>* <b>Type:</b> Contribution</li> <li>* <b>Subtype:</b> In-Kind/Forgiven Personal Expenditures</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li><b>Description and/or Purpose</b></li> <li><b>Occupation Letter Date</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>In-Kind/Forgiven Account Payable</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the Account Payable is forgiven</li> <li>* <b>Type:</b> Contribution</li> <li>* <b>Subtype:</b> In-Kind/Forgiven Account Payable</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li><b>Description and/or Purpose</b></li> <li><b>Occupation Letter Date</b></li> <li><b>Notes</b></li> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate: forgiving a portion of an Account Payable</i></li> <li>- <i>Complete: forgiving the full amount of the Account Payable</i></li> <li>- <i>The Account Payable transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>
<p><b><u>Loan Received (Non-Exempt)</u></b></p> <p><i>Loan not from a financial institution</i></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Contribution</li> <li>* <b>Subtype:</b> Loan Received (Non-Exempt)</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li>* <b>Interest Rate</b> <i>(may be zero)</i></li> <li>* <b>Repayment Schedule</b> <i>(may be “when funds available” or a specific timeframe)</i></li> <li><b>Description and/or Purpose</b></li> <li><b>Occupation Letter Date</b></li> <li><b>Notes</b></li> </ul>	

# Expenditures

- ✓ **Cash Expenditure:** An expenditure made by the committee via check, credit card, debit card, or other electronic transmission.
- ✓ **Account Payable:** An amount owed to a creditor for the purchase of goods or services.
- ✓ **Personal Expenditure for Reimbursement:** An expenditure by a person from their personal funds, made on behalf of the candidate or committee, if the person expects reimbursement.
- ✓ **Loan Payment (Non-Exempt):** A payment made on the **principal** of a non-exempt loan. \* = REQUIRED FIELDS

<p><b><u>Cash Expenditure</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> Either the date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Expenditure</li> <li>* <b>Subtype:</b> Cash Expenditure</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Payment Method</b> (If “Check” is selected, a check number is required)</li> <li>* <b>Amount</b></li> <li>* <b>Description and/or Purpose:</b> If reimbursing a previously reported Personal Expenditure you must use the Purpose “Reimbursement for Personal Expenditures”</li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>* <b>Transaction Association</b>  <i>Only required if paying an Accounts Payable</i> <ul style="list-style-type: none"> <li>- <i>Associate: paying a portion of an Account Payable</i></li> <li>- <i>Complete: paying off the full Account Payable</i></li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>	<p><b><u>Personal Expenditure for Reimbursement</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the person makes the Expenditure from personal funds (using cash, check, credit card or debit card)</li> <li>* <b>Type:</b> Expenditure</li> <li>* <b>Subtype:</b> Personal Expenditure for Reimbursement</li> <li>* <b>Payer of Personal Expenditure:</b> Name of Person that made purchase with their own money</li> <li>* <b>Contributor/Payee:</b> Who the expenditure was paid to</li> <li>* <b>Amount</b></li> <li>* <b>Description and/or Purpose</b></li> </ul> <p><b>Notes</b></p>
<p><b><u>Account Payable</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the obligation is first incurred, even if an invoice is not received until a later time</li> <li>* <b>Type:</b> Expenditure</li> <li>* <b>Subtype:</b> Account Payable</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li>* <b>Description and/or Purpose</b></li> </ul> <p><b>Notes</b></p>	<p><b><u>Loan Payment (Non-Exempt)</u></b>  <i>Loan not from a financial institution</i></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> Either the date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Expenditure</li> <li>* <b>Subtype:</b> Loan Payment (Non-Exempt)</li> <li>* <b>Contributor/Payee</b></li> <li>* <b>Payment Method</b> (If “Check” is selected, a check number is required)</li> <li>* <b>Amount</b></li> <li>* <b>Description</b></li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate: paying a portion of Loan</i></li> <li>- <i>Complete: paying full amount of Loan</i></li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>

## Other Account Receivable

- ✓ **Miscellaneous Account Receivable:** This is the only subtype used to report an Other Account Receivable. This subtype includes the receivable associated with a loan extended by a committee, or to report the fair market value of auction/fundraising proceeds that have not been collected.

\* = REQUIRED FIELDS

<b><u>Miscellaneous Account Receivable</u></b>	
* <b>Date:</b> When the committee makes an Expenditure for a Loan	* <b>Contributor/Payee</b>
* <b>Type:</b> Other Account Receivable	* <b>Amount</b>
* <b>Subtype:</b> Miscellaneous Account Receivable	* <b>Description and/or Purpose</b>
	<b>Notes</b>

## Other

- ✓ **Cash Balance Adjustment and Personal Expenditure Balance Adjustment:** A transaction adjusting the committee’s cash balance or personal expenditure balance on the Account Summary page.



*Balance adjustment transactions will result in an automatic 10% penalty*

- ✓ **Account Payable Rescinded:** A previously reported account payable transaction that is no longer owed because the payable is disputed.
- ✓ **Loan Forgiven (Non-Exempt):** A previously reported non-exempt loan received that is forgiven by the lender.

\* = REQUIRED FIELDS

<p><b><u>Cash Balance Adjustment</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the committee determines it cannot reconcile or find the discrepancy in their balance</li> <li>* <b>Type:</b> Other</li> <li>* <b>Subtype:</b> Cash Balance Adjustment</li> <li><b>Contributor/Payee</b></li> <li>* <b>Amount:</b> <i>To subtract amount from balance, enter a – before the number or enter the number in (parenthesis)</i></li> <li>* <b>Description:</b> <b>To match bank balance</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>Personal Expenditure Balance Adjustment</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the committee determines it cannot reconcile or find the discrepancy in their balance</li> <li>* <b>Type:</b> Other</li> <li>* <b>Subtype:</b> Personal Expenditure Balance Adjustment</li> <li><b>Contributor/Payee</b></li> <li>* <b>Amount:</b> <i>To subtract amount from outstanding balance, enter a – before the number or enter the number in (parenthesis)</i></li> <li>* <b>Description:</b> <b>To match committee records</b></li> <li><b>Notes</b></li> </ul>
<p><b><u>Account Payable Rescinded</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the Account Payable is rescinded</li> <li>* <b>Type:</b> Other</li> <li>* <b>Subtype:</b> Account Payable Rescinded</li> <li><b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li>* <b>Description</b></li> <li><b>Notes</b></li> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate: partial amount is rescinded</i></li> <li>- <i>Complete: full amount is rescinded</i></li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>	<p><b><u>Loan Forgiven (Non-Exempt)</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the Loan is forgiven</li> <li>* <b>Type:</b> Other</li> <li>* <b>Subtype:</b> Loan Forgiven (Non-Exempt)</li> <li><b>Contributor/Payee</b></li> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate: partial amount is forgiven</i></li> <li>- <i>Complete: full amount is forgiven</i></li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>

## Other Receipt

- ✓ **Items Sold at Fair Market Value:** Proceeds from the sale of items that are purchased at fair market value.
- ✓ **Lost or Returned Check:** A check that is returned or a check that has been reported as an expenditure but is subsequently lost in the mail, never cashed or a stop payment is ordered on the issued check.
- ✓ **Refunds and Rebates:** Refunds of deposits and rebates from vendors.
- ✓ **Interest/Investment Income:** Interest earned from bank accounts and proceeds earned from investments.
- ✓ **Miscellaneous Other Receipt:** Payments received on loans extended to another committee or organization and other miscellaneous receipts that are not contributions.
- ✓ **Loan Received (Exempt):** A loan from a financial institution.

\* = REQUIRED FIELDS

<p><b><u>Items Sold at Fair Market Value</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Items Sold at Fair Market Value</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>Interest/Investment Income</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the committee receives the statement reporting the interest earned on investment proceeds</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Interest/Investment Income</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul>
<p><b><u>Lost or Returned Check</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When the committee stops check, reissues a replacement, no longer expects check to be cashed or when notified check was returned</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Lost or Returned Check</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul> <p>* <b>Transaction Association</b></p> <ul style="list-style-type: none"> <li>- <i>Associate: partial amount is returned</i></li> <li>- <i>Complete: the full amount is returned</i></li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for the transaction</i></li> </ul>	<p><b><u>Miscellaneous Other Receipt</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Miscellaneous Other Receipt</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li>* <b>Description</b></li> <li><b>Notes</b></li> </ul> <p>* <b>Transaction Association</b></p> <ul style="list-style-type: none"> <li>- <i>Payment received for a Loan Extended must be “associated” or “completed” with the loan’s Misc. Account Receivable transaction</i></li> </ul>
<p><b><u>Refunds and Rebates</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Refunds and Rebates</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>Loan Received (Exempt)</u></b> <i>Loan from a financial institution</i></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> When funds are received into the committee’s custody</li> <li>* <b>Type:</b> Other Receipt</li> <li>* <b>Subtype:</b> Loan Received (Exempt)</li> </ul> <p><b>Contributor/Payee</b></p> <ul style="list-style-type: none"> <li>* <b>Amount</b></li> <li>* <b>Interest</b></li> <li>* <b>Repayment Schedule</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul> <p>* <b>Co-Signer Obligation:</b> Name and Amount <i>** Only required if there is a co-signer on the loan</i></p>

## Other Disbursement

- ✓ **Miscellaneous Other Disbursement:** Loss on an investment, expenses for the preparation and distribution of slate cards and sample ballots by state or local political party committees.
- ✓ **Loan Payment (Exempt):** A payment made on the **principal** of an exempt loan.
- ✓ **Nonpartisan Activity:** Expenses incurred in conducting nonpartisan activities.
- ✓ **Return or Refund of Contribution:** Contributions that are received by the committee, but subsequently returned or refunded to the contributor, or contribution checks returned by the bank due to insufficient funds.


\* = REQUIRED FIELDS

<p><b><u>Miscellaneous Other Disbursement</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> The date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Other Disbursement</li> <li>* <b>Subtype:</b> Miscellaneous Other Disbursement</li> <li>* <b>Contributor/Payee</b></li> <li><b>Payment Method</b></li> <li>* <b>Amount</b></li> <li>* <b>Description</b></li> <li><b>Notes</b></li> </ul>	<p><b><u>Non-Partisan Activity</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> The date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Other Disbursement</li> <li>* <b>Subtype:</b> Non-Partisan Activity</li> <li>* <b>Contributor/Payee</b></li> <li><b>Payment Method</b></li> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> </ul>
<p><b><u>Loan Payment (Exempt)</u></b></p> <p><i>Loan from a financial institution</i></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> The date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Other Disbursement</li> <li>* <b>Subtype:</b> Loan Payment (Exempt)</li> <li>* <b>Contributor/Payee</b></li> <li><b>Payment Method</b></li> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate:</i> paying part of the loan</li> <li>- <i>Complete:</i> paying off the entire loan</li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for that transaction.</i></li> </ul> </li> </ul>	<p><b><u>Return or Refund of Contribution</u></b></p> <ul style="list-style-type: none"> <li>* <b>Date:</b> The date written on the check, the date the credit/debit card was used, or date of EFT</li> <li>* <b>Type:</b> Other Disbursement</li> <li>* <b>Subtype:</b> Return or Refund of Contribution</li> <li>* <b>Contributor/Payee</b></li> <li><b>Payment Method</b></li> <li>* <b>Amount</b></li> <li><b>Description</b></li> <li><b>Notes</b></li> <li>* <b>Transaction Association</b> <ul style="list-style-type: none"> <li>- <i>Associate:</i> returning part of contribution</li> <li>- <i>Complete:</i> returning full contribution</li> <li>- <i>The transaction will display in the Transaction Association section. If it does not automatically display, conduct a search for the transaction</i></li> </ul> </li> </ul>

# Campaign Finance Manual

*Published by*

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**Secretary of State**

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## Icons

The following icons are used in this manual to emphasize information:

**alert icon**

indicates alert; warning; attention needed

**info icon**

indicates additional information

**deadline icon**

indicates a deadline

**search icon**

indicates information located elsewhere

**example icon**

indicates a detailed example of a concept, process or form

**form icon**

indicates a reference to a form

## Assistance

If you have any questions about the material covered in this manual or need further assistance, please contact:


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for the hearing impaired

# Getting Started

## Using the Campaign Finance Manual

---

The 2024 Campaign Finance Manual is intended to provide committees and persons required to file independent expenditures with information about the legal and procedural requirements of campaign finance reporting.

ORS chapter 260, “Campaign Finance Regulation; Election Offenses,” requires disclosure of contributions and expenditures related to any candidate, measure, or political party active in any election including initiative, referendum, and recall petition drives. Persons making independent expenditures related to an election may also be required to disclose those expenditures. It also requires the electronic filing of campaign finance transactions using ORESTAR.

This manual only covers Oregon state campaign finance law. It should not be construed as guidance or interpretations of federal laws and regulations, or laws from local jurisdictions that may have adopted their own campaign finance reporting requirements.



The Campaign Finance Manual and associated forms are adopted by Oregon Administrative Rule No. 165-012-0005.



See page 96, [Information Sources](#), for contact information on other regulatory organizations.

## Using the ORESTAR User’s Manuals and Video Tutorials

---

The system developed by the Secretary of State to disclose campaign finance activity is called the Oregon Elections System for Tracking and Reporting (ORESTAR). ORESTAR is used to file campaign finance transactions electronically.

Each committee and independent expenditure filer with reporting obligations should have an account in ORESTAR. Only the candidate, treasurer, and other authorized users designated by the candidate or treasurer of a committee, and the individual designated as the independent expenditure filer have access to the account.

Two manuals and several [video tutorials](#) have been developed to help a user navigate through ORESTAR committee registration and campaign finance reporting:

- The [ORESTAR User’s Manual: Statement of Organization](#) explains how to electronically file a Statement of Organization.
- The [ORESTAR User’s Manual: Transaction Filing](#) explains how to electronically file campaign finance transactions.

These manuals are available at [www.oregonvotes.gov](http://www.oregonvotes.gov)

# Creating a Committee


## Candidate Committees

“Candidate” includes any of the following:

- an individual whose name is printed on a ballot, for whom a declaration of candidacy, nominating petition, or certificate of nomination to public office has been filed, or whose name is expected to be or has been presented, with the individual’s consent, for nomination or election to public office;
- an individual who has solicited or received and accepted a contribution, made an expenditure, or given consent to an individual, organization, political party or political committee to solicit or receive and accept a contribution or make an expenditure on the individual’s behalf to secure nomination or election to any public office at any time, whether or not the office for which the individual will seek nomination or election is known when the solicitation is made, the contribution is received and retained, or the expenditure is made, and whether or not the name of the individual is printed on a ballot;

**or**

- a public office holder against whom a recall petition has been completed and filed.

 A candidate for federal office or the office of precinct committee person does not file a Statement of Organization or file contribution and expenditure transactions with the Elections Division.

Each candidate must establish a campaign account and file a Statement of Organization designating a candidate committee unless the candidate meets the exception described below.

## When to Create a Candidate Committee

A candidate must file a Statement of Organization not later than three business days after first receiving a contribution or making an expenditure or not later than the deadline for filing a nominating petition, declaration of candidacy, or certificate of nomination, whichever occurs first.


## Exception to Creating a Candidate Committee

A candidate is not required to form a candidate committee if the candidate meets all three of the following conditions:

- The candidate serves as the candidate’s own treasurer;
- The candidate does not have an existing candidate committee;

**and**

- The candidate does not expect to receive or spend more than \$1,500 during a calendar year.

 A candidate that has an existing candidate committee but meets the other two conditions may discontinue the candidate committee and close the bank account in order to meet the statutory exception.

The \$1,500 includes funds spent for any campaign-related costs, such as the candidacy filing fee; however, state or county voters’ pamphlet filing fees and *de minimis* costs associated with printing and circulating a petition in lieu of paying a fee for inclusion in a voters’ pamphlet, are not included when calculating contribution or expenditure totals. In general, the use of pens, paper, clipboards, and printer ink from existing household supplies qualifies as *de minimis* costs if the total combined value of using the items is less than \$50. Items purchased specifically for the petition circulation effort do not qualify as *de minimis* costs. If a candidate uses personal funds, those purchases are considered contributions.

If at any time during a calendar year the candidate exceeds \$1,500 in either contributions or expenditures, the candidate must establish a campaign account and file a candidate committee not later than three business days after exceeding the \$1,500 threshold. Further, the candidate must also either file all transactions or a Certificate of Limited Contributions and Expenditures (if eligible) within 7 calendar days after aggregate contributions or aggregate expenditures exceed \$1,500 during a calendar year. If the committee does not file a Certificate, all transactions are due on the same date as the transaction that caused the committee to exceed the \$1,500 threshold.

## Responsibilities and Liability

The candidate may serve as the committee's treasurer or appoint a separate treasurer. The treasurer of a candidate committee must be an Oregon elector.

The candidate and/or treasurer of a candidate committee is legally responsible for:

- establishing and maintaining a dedicated campaign account in an Oregon financial institution for depositing contributions and making expenditures;
  - signing and filing a Statement of Organization;
  - attesting to and filing transactions;
  - keeping detailed financial records current to within seven business days after the date of receiving a contribution or making an expenditure;
- and**
- preserving records as described in "Retention of Records."

The candidate is personally liable if the appointed treasurer fails to perform any of the required duties.

## Political Action Committees

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A political action committee is a combination of two or more individuals, or a person other than an individual, that receives a contribution or makes an expenditure for the purpose of supporting or opposing a candidate, measure, or political party. Each political action committee must establish a campaign account at an Oregon financial institution and file a Statement of Organization.

### When to Create a Political Action Committee

The treasurer of a political action committee must file a Statement of Organization not later than three business days after first receiving a contribution or making an expenditure.

### Exceptions to Creating a Political Action Committee

- a person who solicits and receives contributions designated to an identified candidate or political committee which are forwarded to a committee within seven business days of receipt;
  - a person who makes a contribution to a candidate or committee that is required to disclose the receipt of the contribution or has filed a Certificate of Limited Contributions and Expenditures;
- or**
- a group or organization formed to support or oppose a petition that is not certified to the ballot because it has not qualified as a measure or the governing body has not filed the Notice of Measure Election with the local filing officer.

However, a group or organization that intends to support or oppose a measure or petition is required to file as a political action committee when the petition is certified as a measure. If a group or organization is soliciting

contributions and making expenditures prior to forming a political action committee, it must keep track of all activity so that it can report all initial assets when the committee is filed. See “Initial Assets” on page 20 for more information.

## Responsibilities and Liability

The treasurer of a political action committee must be an Oregon elector.

The treasurer of a political action committee is legally responsible for all of the following:

- establishing and maintaining a dedicated campaign account in an Oregon financial institution for depositing contributions and making expenditures;
- signing and filing a Statement of Organization;
- attesting to and filing transactions;
- keeping detailed financial records current to within seven business days after the date of receiving a contribution or making an expenditure;

**and**

- preserving records as described in “Retention of Records.”

The treasurer of a political action committee is personally responsible for carrying out their duties and is personally liable should they fail to perform any required duties. The treasurer of record (i.e., the treasurer listed on the Statement of Organization at the time a transaction is due) is legally responsible for these duties until an amended Statement of Organization is filed appointing a new treasurer.

A political action committee may also have a Civil Penalty Designee that assumes liability for any penalty imposed for late or insufficient transactions. A Civil Penalty Designee must be named on the Statement of Organization and agree to be legally responsible for any penalty imposed for late or insufficient transactions by signing the Statement of Organization. The Civil Penalty Designee of record (i.e. the Civil Penalty Designee listed on the Statement of Organization at the time a transaction is due) must be an Oregon elector and is legally responsible for paying civil penalties until an amended Statement of Organization is filed removing the Civil Penalty Designee or appointing a new one.

## Petition Committees

A petition committee is a committee formed by the chief petitioners of an initiative, referendum, or recall petition. A petition committee must be designated to support only one initiative, referendum, or recall petition. The appointed treasurer of the petition committee must file a Statement of Organization and establish a campaign account at an Oregon financial institution.



Cover and signature sheets will not be approved for circulation until a petition committee is established.

## When to Create a Petition Committee

The treasurer of an initiative, referendum, or recall petition committee must file a Statement of Organization not later than three business days after first receiving a contribution or making an expenditure after filing a prospective petition with the appropriate filing officer or not later than the date the petition is approved for circulation, whichever occurs first.

## Exceptions to Creating a Petition Committee

- the chief petitioner(s) of a district formation;
- The chief petitioner(s) of a disincorporation;
- or**
- the chief sponsor of a minor political party formation.

**i** If the initiative, referendum, recall, district formation, disincorporation petition or minor political party subsequently qualifies, and the chief petitioner(s) intend to support the measure, minor political party or recall, the chief petitioner(s) must form a political action committee and file campaign finance activity.

## Responsibilities and Liability

The treasurer of a petition committee must be an Oregon elector.

The treasurer of a petition committee is legally responsible for all of the following:

- establishing and maintaining a dedicated campaign account in an Oregon financial institution for depositing contributions and making expenditures;
- signing and filing a Statement of Organization;
- attesting to and filing transactions;
- keeping detailed financial records current to within seven business days after the date of receiving a contribution or making an expenditure;

**and**

- preserving records as described in “Retention of Records.”

The treasurer of a petition committee is personally responsible for carrying out their duties and is personally liable should they fail to perform any required duties. The treasurer of record (i.e., the treasurer listed on the Statement of Organization at the time a transaction is due) is legally responsible for these duties until an amended Statement of Organization is filed appointing a new treasurer.

A petition committee may also have a Civil Penalty Designee that assumes liability for any penalty imposed for late or insufficient transactions. A Civil Penalty Designee must be named on the Statement of Organization and agree to be legally responsible for any penalty imposed for late or insufficient transaction by signing the Statement of Organization. The Civil Penalty Designee of record (i.e. the Civil Penalty Designee listed on the Statement of Organization at the time a transaction is due) must be an Oregon Elector and is legally responsible for paying civil penalties until an amended Statement of Organization is filed removing the Civil Penalty Designee or appointing a new one. The treasurer may also wish to review the [Filing Requirements if a Petition Qualifies to the Ballot](#) section on page 19

## Campaign Bank Account Information

All committees are required to establish a dedicated campaign bank account. This applies to an original filing and any amended filing changing the treasurer or adding a new signer on the account.

If the committee is filing an original Statement of Organization and the campaign account has not been established at the designated financial institution, the campaign account must be established within five business days of the filing. If the name of the financial institution changes, the committee must file an amended Statement of Organization within five business days of the original filing to disclose the updated campaign account information. Campaign account information provided is exempt from public disclosure.

The following rules apply to setting up and maintaining the campaign account:

- The account must be established in a financial institution located in Oregon.
- The account must be maintained in the name of the committee.
- For a candidate committee, the account holder must include the candidate or the name of the candidate committee. For a political action or petition committee, the account holder must include the treasurer or the name of the committee or the affiliated organization that administers the account. Other individuals may also be listed as account holders, as long as they also have signature authority.
- All expenditures made by the committee must be drawn from the campaign account and issued on a check or paid using a debit card or other form of electronic transmission. The treasurer, and candidate, if applicable, must be signers on the campaign account.
- Each contribution must be deposited into the campaign account not later than seven business days after the date the contribution is received.
- The campaign account must not include any moneys other than contributions or other receipts received by the committee.



Petty cash funds are not permitted.

## Where to File a Statement of Organization

All Statements of Organization and campaign finance transactions must be filed with the Elections Division.

A local jurisdiction (e.g., a city or county) may adopt ordinances that require a committee to also file campaign finance information with the local jurisdiction.



Electronic signatures on Statements of Organization, Certificates of Limited Contributions and Expenditures, and transactions filed using ORESTAR are executed by attaching the filer's username. Do not share your username or password. Do not log in using the username or password of another individual. The attestation and signature(s) on a Statement of Organization or on a Certificate of Limited Contributions and Expenditures filed using the paper forms will be converted to electronic documents and are the official record.

## Filing a Statement of Organization

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A committee may file the Statement of Organization electronically using ORESTAR or by completing the appropriate paper form and submitting it to the Elections Division by:

- scanning and emailing the forms to [orestar-support.sos@sos.oregon.gov](mailto:orestar-support.sos@sos.oregon.gov)
- mailing or hand delivering to Public Service Building, 255 Capitol St. NE, Suite 126, Salem, OR 97310.

or

- faxing to (503) 373-7414

Refer to the [ORESTAR User's Manual: Statement of Organization](#) to file the Statement of Organization electronically.

A political action committee or petition committee that has a Civil Penalty Designee cannot currently file a Statement of Organization electronically and must file by completing the paper form.

All forms and instructions may be downloaded from the Elections Division's website: [www.oregonvotes.gov](http://www.oregonvotes.gov).



See "Instructions for Completing Forms" on pages 87

If filing the Statement of Organization by completing the paper form one of the following three forms must be submitted:

- Candidate Committee: Form [SEL 220: Statement of Organization for Candidate Committee](#);
- Political Action Committee: Form [SEL 221: Statement of Organization for Political Action Committee](#);

or

- Petition Committee: Form [SEL 222: Statement of Organization for Petition Committee](#).

## Amending Statement of Organization Information

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If any of the information on the Statement of Organization changes, the change must be reported not later than the 10<sup>th</sup> calendar day after the change of information occurs. The amendment can be filed electronically using ORESTAR or by completing the appropriate paper form. A change in information on a Statement of Organization includes a change to any field of information on the filing. This includes changes in election activity to indicate that the committee is active in an election.



If a candidate is nominated at the primary election they must file an amended Statement of Organization to indicate that they will be active at the general election.

If an existing political action committee is supporting or opposing a measure they must file an amended Statement of Organization to indicate that they will be active at the election.


When filing an amendment using the paper form, complete the entire form, not just the updated information. The amended form must be signed by the treasurer, candidate, and civil penalty designee, if applicable, and will supersede all previous filings.

## Discontinuing a Committee

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A committee may discontinue when it:

- no longer intends to receive contributions or make expenditures;
  - has achieved a zero balance;
  - has no outstanding debts or obligations;
- and**
- the campaign bank account has been closed.

 A petition committee may not discontinue unless the petition has been withdrawn, the deadline to submit signatures for verification has passed, or the petition has been certified as a measure, whichever is earlier.

Any committee that has filed a Certificate of Limited Contributions and Expenditures for every calendar year since its original Statement of Organization was filed is not required to file contribution and expenditure transactions to discontinue, but it must achieve a zero balance and have no outstanding debts or obligations.

A committee with outstanding debts can achieve a zero balance by repaying or forgiving all debts (outstanding loans, personal expenditures, and accounts payable).



Warning: committee funds and assets must not be converted to personal use by any person.

Any remaining funds in the committee's campaign account may be:

- used to defray any expenses incurred in connection with the candidate's duties as a public office holder;
  - contributed to another committee;
  - contributed to any organization described in section 170(c) of Title 26 of the Internal Revenue Code or to any charitable organization defined in ORS 128.620;
- or**
- used for any other lawful purpose.



A user retains access to the committee's Private Workshop in ORESTAR for one year after the committee's discontinuation date.

# Independent Expenditure Filers

An independent expenditure is an expenditure or account payable that is not made with the cooperation or prior consent of, or in consultation with, or at the request or suggestion of, a candidate, agent, authorized committee of the candidate, any political committee, or agent of a political committee supporting or opposing a measure. A person must register as an independent expenditure filer if any of the following are true:

- A. a person makes independent expenditures of more than \$250 in a calendar year for a communication to support or oppose any candidate or measure;
- B. a person makes independent expenditures of \$250 or more for a communication that refers to a clearly identified candidate or measure that will appear on the ballot and the communication is published and disseminated to the relevant electorate within 60 calendar days before the primary election, 120 calendar days before the general election, or 90 calendar days before any other election; or
- C. a person makes independent expenditures more than \$250 for a communication that refers to a political party and the communication is published and disseminated to the relevant electorate within 60 calendar days before the primary election, 120 calendar days before the general election, or 90 calendar days before any other election.

Independent expenditure filers must register and disclose the independent expenditures using ORESTAR. The \$250 includes all political expenditures, not just expenditures for a single candidate, measure, or political party. The Filer is not a political action committee.

## Standards for Category A - Advocacy for “Support” or “Opposition”

The following information applies if a person makes independent expenditures of more than \$250 for a communication to support or oppose any candidate or measure (see A above):

- the communication clearly identifies the candidate or measure;
- when taken as a whole and with limited reference to external events, such as the proximity to the election, the communication could only be interpreted by a reasonable person as containing advocacy for the election or defeat of the candidate, passage or defeat of the measure;

**and**

- the communication is unmistakable, unambiguous and suggestive of only one meaning.

The above standards do not apply to communications referenced under B and C above.

**An independent expenditure is not:**

- a contribution made directly to a committee and reported by the committee
- or**
- an expenditure reported as an in-kind contribution by a committee.

## Exceptions to Category B and C – Nonpartisan Communications

A nonpartisan communication does not constitute an independent expenditure in the following situations:

- publication of a nonpartisan voters' guide that is:
  - permitted to be published by a nonprofit, 501(c)(3), entity or
  - includes or offers all major political party candidates for the state office referenced a reasonable opportunity to be included;
- a commercial communication that depicts a candidate's name, image, likeness, or voice only in the candidate's capacity as owner, operator, or employee of a business that existed prior to the candidate's declaration of candidacy;
- official publications produced or distributed by public employees while on the job during working hours;  
**or**
- a communication by a labor union, membership organization, or corporation only to its members, stockholders or executive or administrative personnel.

## Independent Expenditure Filer Registration Information

A person making independent expenditures may register prior to exceeding the threshold and enter the transactions in the person's Private Workshop so ORESTAR can calculate expenditure totals to determine when the \$250 threshold has been exceeded. When the threshold is exceeded, an email will be sent notifying the person that the \$250 threshold has been exceeded and that the expenditures must be filed not later than seven calendar days after exceeding the \$250 threshold.

Any additional expenditures made after exceeding the threshold are required to be filed not later than the applicable deadline: either seven or 30 calendar days after the date of the expenditure, depending on the proximity to the election. Independent expenditure filers are subject to the 7-day reporting deadlines for every election. See [Schedule of Transaction Deadlines for Independent Expenditure Filers](#) on pages 25-26.

Contact the Elections Division if you have questions regarding whether a particular expenditure is an independent expenditure.

## Independent Expenditure Filer Responsibilities

An independent expenditure filer is not required to be an Oregon elector. The Filer of Independent Expenditures is legally responsible for attesting to and filing transactions. The individual designated as the Independent expenditure filer can never be amended, nor can they designate an alternate transaction filer.

## Liability

The individual designated as the independent expenditure filer is personally liable for any penalties assessed for late and insufficient filings.

# Campaign Finance Transactions


This section outlines the deadlines and requirements for filing contribution and expenditure transactions. Oregon election law requires complete, accurate, and timely disclosure of contributions and expenditures by committees and independent expenditure filers.


Reporting deadlines are set by statute and penalties may be imposed for late or insufficient transaction reporting. After a transaction is saved in ORESTAR, you must also validate and file the transaction. Refer to the [ORESTAR User's Manual: Transaction Filing](#) for instructions on filing transactions using ORESTAR.

## Filing Campaign Finance Transactions

A committee must maintain detailed records of all contributions and expenditures. If a committee expects to receive a total of more than \$5,000 or spend a total of more than \$5,000 for a calendar year, the committee must file all transactions electronically using ORESTAR.

If a committee does not expect to receive a total of more than \$5,000 or spend a total of more than \$5,000 in a calendar year, the committee may file a Certificate of Limited Contributions and Expenditures. The committee may file a Certificate electronically using ORESTAR or may file the paper form [PC 7](#).

 If a committee has already filed transactions electronically in the calendar year, a Certificate cannot be filed for that year; a Certificate must be filed prior to filing any transactions in ORESTAR. If a committee has entered but not filed transactions for the calendar year, the unfiled transactions may be deleted in order to file a Certificate.


 A committee must file either detailed transactions or a Certificate, whichever is applicable. An independent expenditure filer is not eligible to file a Certificate and must file all expenditures after exceeding the \$250 threshold. Civil penalties may be imposed for failing to file a transaction or Certificate by the deadline.

## Filing a Certificate of Limited Contributions and Expenditures

A committee must be established in order to file a Certificate. A committee that has filed a Certificate is encouraged to enter its transactions into the committee's Private Workshop in ORESTAR so the system can calculate transaction totals to determine when it has exceeded the \$5,000 threshold. If the threshold is exceeded, an email will be sent notifying the committee that the Certificate threshold has been exceeded (i.e., that the Certificate has expired) and that all transactions that have occurred in that calendar year must be filed not later than seven calendar days after exceeding the threshold. It is important for the transactions to be entered in date order so ORESTAR can correctly calculate the date the threshold is exceeded and notify the committee appropriately.

### When to File a Certificate

A Certificate must be filed not later than seven calendar days after receiving the first contribution or making the first expenditure in a calendar year. If a committee has already filed transactions in ORESTAR in the calendar year, a Certificate cannot be filed for that year.

 A certificate must be filed each calendar year if the committee believes they are eligible and chooses not to file detailed transactions. If a committee filed a certificate for the previous calendar year and does not believe they will maintain eligibility the following year, they should contact the Elections Division to update their balance as of December 31 of the previous year.

## What if a Committee Exceeds the \$5,000 Certificate Threshold?

A committee must continuously maintain detailed records of all contributions received and expenditures made even if it files a Certificate. If at any time during the calendar year either the total contributions or total expenditures exceed \$5,000, the committee must file all transactions electronically using ORESTAR. The deadline for filing all transactions occurring during that calendar year is seven calendar days after the date of the transaction that causes the committee to exceed the threshold.

## Reporting Detailed Transactions

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For each transaction, detailed information about the contributor or payee must be disclosed to the public if the aggregate (total amount received from the same contributor or paid to the same payee) has exceeded \$100 in a calendar year.

The aggregate for a contributor includes transaction subtypes cash contribution, in-kind contribution, and non-exempt loan. The aggregate for a payee includes transaction subtypes account payable, cash expenditure, non-exempt loan payment, and personal expenditure for reimbursement. If the aggregate is not exceeded, the transaction is disclosed to the public as a miscellaneous transaction but no information about the contributor or payee is disclosed.

## Committee Reporting Deadlines

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The statutes designate specific deadlines for submitting transactions based on the date of an election and the date of the transaction; penalties may be imposed for late or insufficient reporting. If a committee is not eligible to file a Certificate of Limited Contributions and Expenditures, all transactions must be reported on a continuous basis, with each transaction having its own filing deadline. Continuous reporting also applies to independent expenditure filers.

ORESTAR automatically calculates transaction due dates based on the transaction dates entered by the committee. A transaction is due not later than 11:59:00 pm on the day of the deadline to file the transaction. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day. Generally, a transaction is due not later than 30 calendar days after the date of the transaction, but there are some circumstances when a transaction is due not later than seven calendar days after the date of the transaction.

For committees active in an election, transactions that occur between the 42<sup>nd</sup> day before the election and Election Day are due not later than seven calendar days after the date of the transaction. A transaction that occurs prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election, is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.

Refer to [Schedule of Transaction Deadlines](#) on pages 21-26 for Candidate, Political Action Committees and Petition Committees.

Additionally, there are specific reporting deadlines for contributions received during a legislative session, for recall and referendum petition committee transactions and for a committee that reports initial assets; see [pages 18 - 20](#) for an explanation of those deadlines.

## Independent Expenditure Filer Reporting Deadlines

An independent expenditure filer is required to file all expenditures made on or after January 1 of a calendar year electronically using ORESTAR not later than seven calendar days after exceeding the \$250 expenditure threshold. Any additional expenditure that is made after exceeding the threshold is also required to be filed. Independent expenditure filers are subject to the 7-day reporting deadlines for every election. See [pages 25-26](#) for independent expenditure filer transaction deadlines.

## Special Election Reporting Deadlines

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If a special election is held on an election date not regularly scheduled, any political action committee or independent expenditure filer active at the special election is subject to reporting deadlines for the special election. Except as otherwise provided in the 2025 and 2026 [Schedule of Transaction Deadlines](#) on pages 21-26, transactions related to any special election shall be filed according to the deadlines set forth below.

- a transaction that occurs on or before the 73<sup>rd</sup> day before the date of the special election is required to be filed not later than 30 calendar days after the date of the transaction;
- a transaction that occurs prior to the 42<sup>nd</sup> day before the date of the special election and has not been filed by the 43<sup>rd</sup> day before the special election is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the special election, whichever date occurs first; and
- a transaction that occurs on the 42<sup>nd</sup> day through the date of the special election is required to be filed not later than 7 calendar days after the date of the transaction.

## Active in an Election

Being active in an election means that the political committee or independent expenditure filer is subject to shorter transaction filing windows leading up to the election. Transactions that occur between the 42<sup>nd</sup> day before the election and Election Day are due no later than seven calendar days after the date of the transaction. Transactions that occur prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.

All candidate and political action committees are presumed to be active at each primary and general election and will be subject to shorter transaction filing windows unless they are eligible to inactivate themselves for the election and affirmatively take steps to do so by opting out of seven-day reporting.

A candidate committee or political action committee is active in an election and cannot inactive themselves and opt-out of seven-day reporting when it solicits contributions or makes expenditures to support or oppose a candidate or measure at the election or files a Statement of Organization designating activity at the election. This includes a candidate committee even if the candidate's name is not printed on the ballot.

Additionally, if a candidate or measure committee reports the receipt of a contribution from another committee and the recipient candidate or measure committee's current Statement of Organization indicates activity at an election, the contributing committee is considered active at the election.

Further, candidate committees and political action committees are active if they engage in any of the following activity:

- makes an expenditure to a measure committee and the recipient measure committee's current Statement of Organization indicates that it is supporting or opposing a measure;
- makes an expenditure to a candidate committee and the recipient candidate committee's current Statement of Organization designates activity at the election;
- makes an expenditure that is identified as an in-kind contribution benefiting a candidate or measure committee, and the candidate or measure committee's current Statement of Organization designates activity at the election;

**or**

- makes an expenditure and identifies it as an independent expenditure supporting or opposing a candidate or measure active at the election.



A candidate who is automatically nominated to the general election is not eligible to opt out of seven-day reporting for the primary election.



A petition committee is subject to seven-day reporting for primary and general elections and cannot opt-out. An independent expenditure filer is subject to seven-day reporting for every election and cannot opt-out of any election.



A committee that determines they are active in a special election and is not otherwise activated by ORESTAR based on the criteria above must contact the Elections Division to activate themselves for the election.

## How does a committee inactivate themselves and opt-out of seven-day reporting at the primary or general election?

The committee must access the Election Activity Log in the committee's Private Workshop in ORESTAR and indicate the committee is not active. See the [ORESTAR User's Manual: Statement of Organization](#) for instructions on inactivating a committee for an election.

## Reporting Contributions Received During Legislative Session

Oregon election law does not prohibit receiving contributions during a legislative session, but there is a separate and distinct deadline to file any contribution (cash, in-kind, or non-exempt loan of any amount), received from January 1 to adjournment of an annual legislative session or during a special legislative session, by:

- a legislative official, or a candidate for a legislative office at a future election;
- a statewide official, a statewide official-elect, or a candidate for a statewide office at a future election;
- the Governor, Governor-elect, and any candidate for Governor at a future election;

or

- a controlled committee (controlled by an individual subject to legislative reporting), or a legislative caucus committee.



"Statewide official" includes Secretary of State or Secretary of State-elect, State Treasurer or State Treasurer-elect, Attorney General or Attorney General-elect, and the Commissioner of the Bureau of Labor and Industries or the Commissioner-elect of the Bureau of Labor and Industries.

Contributions that are returned to the contributor within two business days, without being deposited into the campaign account, are not required to be reported.

## Legislative Session Reporting Deadlines

Contributions received from January 1 to adjournment (*Sine Die*) during an annual session, and during any special session of the Legislative Assembly must be filed not later than the reporting deadlines set forth below.



### Annual Legislative Session

Contributions received January 1 through the day before the annual legislative session begins are due not later than 11:59:00 pm of the second business day after the first day of the session. Contributions received on or after the first day of session are due not later than the second business day following the date the contribution is received.



### Special Legislative Session

Contributions received during any special session of the Legislative Assembly are due no later than 11:59:00 pm of the second business day following the date the contribution is received.



For the Governor, Governor-elect, or any candidate for Governor at a future election, the two-day reporting schedule does not end at *Sine Die*; two-day reporting continues until 30 business days after adjournment of an annual legislative session. This extension does not apply to a special legislative session.

## Petition Committee Transaction Filing Deadlines

This section describes the transaction filing deadlines for initiative, recall, and referendum petition committees and Statement of Organization filing requirements if the petition qualifies to the ballot. A petition committee may file a Certificate of Limited Contributions and Expenditures if it does not expect to receive or spend more than \$5,000 in a calendar year.

## Initiative Petition Committee Transaction Filing Deadlines

Generally, a transaction is due not later than 30 calendar days after the date of the transaction. However, in an even-numbered year, a transaction is due not later than 11:59:00 pm seven calendar days after the date of the transaction during three specific time frames:

- the 42nd day before the date of the primary election and ending on the date of the primary election;
- the 42nd day before the date that is four months prior to the general election and ending on the date four months before the general election;
- the 42nd day before the date of the general election and ending on the date of the general election.

A transaction that occurs prior to the 42<sup>nd</sup> day before the date that is four months before the general election and has not been filed by the 43<sup>rd</sup> day before the date that is four months before the general election, is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the date that is four months before the general election, whichever date occurs first.

A transaction that occurs prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election, is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.



See the “[Schedule of Transaction Deadlines](#)” for Initiative Petition Committees on pages 23-24.

## Recall Petition Committee Transaction Filing Deadlines

For a recall petition committee, a transaction is due not later than seven calendar days after the date of the transaction beginning on the date the completed prospective petition is filed with the filing officer and ending on the deadline for submitting signatures for verification.

Beginning on the day after the deadline for submitting signatures, a transaction is due not later than 30 calendar days after the date of the transaction. All transactions must be filed electronically and are due no later than 11:59:00 pm on the deadline for filing the transaction.

## Referendum Petition Committee Transaction Filing Deadlines

For a referendum petition committee, a transaction is due not later than seven calendar days after the date of the transaction beginning on the date the petition committee timely files its Statement of Organization with the Elections Division and ending on the deadline for submitting signatures for verification.

Beginning on the day after the deadline for submitting signatures, a transaction is due not later than 30 calendar days after its occurrence. All transactions must be filed electronically and are due not later than 11:59:00 pm on the deadline for filing the transaction.

## Filing Requirements if a Petition Qualifies to the Ballot

If the filing officer determines that a sufficient number of signatures have been submitted to qualify the petition to the ballot, and the petitioner intends to be active at the election, a political action committee must be formed not later than three business days after receiving a contribution or making an expenditure. If the petitioners are soliciting contributions and making expenditures using an existing miscellaneous or measure political action committee, the treasurer of the committee must amend the Statement of Organization not later than ten calendar days after the measure is certified to the ballot to indicate they will be active at the election.


To determine transaction filing deadlines if an initiative or referendum petition qualifies to the ballot, refer to the appropriate election date in the [Schedule of Transaction Deadlines](#). on pages 21-26.

If a recall committee is formed to support or oppose a candidate subject to the recall, transactions are due not later than the 7 calendar days after the date of the transaction through the date of the recall election.


## Initial Assets

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A committee is considered to have “initial assets” if it has money on hand at the time it files its original Statement of Organization. Generally, an individual, a combination of individuals, or a person other than an individual, may not receive a contribution or make an expenditure for the purpose of supporting or opposing a candidate, petition, or measure until filing a Statement of Organization. Therefore, a newly formed committee will ordinarily have no initial assets.

 When reporting eligible transactions in ORESTAR, committees should include “Initial Assets” in the transaction description to ensure the transaction is not incorrectly identified as late.

However, some groups are not prohibited from receiving contributions or making expenditures before filing an original Statement of Organization. Such groups must keep records of all transactions occurring prior to the filing of the Statement of Organization and either be prepared to file those transactions or if eligible, file a Certificate of Limited Contributions and Expenditures. Initial asset transactions include all transaction types including any accounts payable that are still outstanding at the time the Statement of Organization is filed.

 The deadline to file initial asset transactions is the same as the deadline to file the transaction that triggers the establishment of a Statement of Organization. Refer to the appropriate Schedule of Transaction Filing Deadlines or contact the Elections Division to determine the deadline for filing initial asset transactions.

The following four groups may receive contributions or make expenditures (initial asset transactions) prior to filing a Statement of Organization, however any transactions that occur prior to the Statement of Organization being filed must be filed in ORESTAR if the committee is required to be established:

- 1** A chief petitioner of an initiative, referendum, or recall petition that has not filed the prospective petition. The treasurer must file the Statement of Organization to create a petition committee not later than three business days after receiving the first contribution or making the first expenditure after the prospective petition is filed or no later than the date the petition is approved for circulation, whichever occurs first.
- 2** Persons other than a chief petitioner, supporting or opposing a petition. If the petition qualifies as a measure and is certified to the ballot, the treasurer must file a Statement of Organization not later than three business days after receiving the first contribution or making the first expenditure after the petition was certified to the ballot.
- 3** Persons supporting or opposing a measure that has been referred by a governing body, but the notice of measure election has not been filed with the county or a recall petition that has not qualified to the ballot. The treasurer must file the Statement of Organization not later than three business days after receiving the first contribution or making the first expenditure after the measure or recall is certified to the ballot.
- 4** Chief petitioners of a minor political party that has not been qualified. The treasurer must file the Statement of Organization not later than three business days after receiving the first contribution or making the first expenditure after the minor political party has qualified.

# Schedule of Transaction Deadlines

## Candidate and Political Action Committees for 2025 Elections


March 11 Election		May 20 Election	
transaction occurs:	deadline to file:	transaction occurs:	deadline to file:
on or before January 5	30th day after date of transaction	on or before March 16	30th day after date of transaction
January 6 to January 27	February 4	March 17 to April 7	April 15
January 28 to March 11	7th day after date of transaction	April 8 to May 20	7th day after date of transaction
August 26 Election		November 4 Election	
transaction occurs:	deadline to file:	transaction occurs:	deadline to file:
on or before June 22	30th day after date of transaction	on or before August 31	30th day after date of transaction
June 23 to July 14	July 22	September 1 to September 22	September 30
July 15 to August 26	7th day after date of transaction	September 23 to November 4	7th day after date of transaction

→ All dates are 2025 unless otherwise noted. Due dates for an individual election apply when the committee is active in that election.

→ Generally, a transaction is due no later than 30 calendar days after the date of the transaction.

→ For committees active in an election, transactions that occur between the 42<sup>nd</sup> day before the election and Election Day are due not later than seven calendar days after the date of the transaction. A transaction that occurs prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election, is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.

→ The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.

 See [page 5](#) for information on calculating the deadline for filing a Certificate of Limited Contributions and Expenditures or detailed transactions if a candidate is exempt from filing a candidate committee but then exceeds the \$1,500 threshold of campaign finance activity.

See “[Filing a Certificate of Limited Contributions and Expenditures](#)” on [page 14](#) for information on calculating the deadline for filing transactions if a committee has exceeded the \$5,000 threshold after filing a Certificate of Limited Contributions and Expenditures for a calendar year.

See [page 18](#) for the deadlines to report contributions received during a legislative session, and who is subject to those deadlines.

# Schedule of Transaction Deadlines

## Candidate and Political Action Committees for 2026 Elections


March 10 Election		May 19 Primary Election	
transaction occurs:	deadline to file:	transaction occurs:	deadline to file:
on or before January 4	30th day after date of transaction	on or before March 15	30th day after date of transaction
January 5 to January 26	February 3	March 16 to April 6	April 14
January 27 to March 10	7th day after date of transaction	April 7 to May 19	7th day after date of transaction
August 25 Election		November 3 General Election	
transaction occurs:	deadline to file:	transaction occurs:	deadline to file:
on or before June 21	30th day after date of transaction	on or before August 30	30th day after date of transaction
June 22 to July 13	July 21	August 31 to September 21	September 29
July 14 to August 25	7th day after date of transaction	September 22 to November 3	7th day after date of transaction

→ All dates are 2026 unless otherwise noted. Due dates for an individual election apply when the committee is active in that election.

→ Generally, a transaction is due not later than 30 calendar days after the date of the transaction.


→ For committees active in an election, transactions that occur between the 42<sup>nd</sup> day before the election and Election Day are due no later than seven calendar days after the date of the transaction. A transaction that occurs prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.

→ The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.

 See [page 5](#) for information on calculating the deadline for filing a Certificate of Limited Contributions and Expenditures or detailed transactions if a candidate is exempt from filing a candidate committee but then exceeds the \$1,500 threshold of campaign finance activity.

See “[Filing a Certificate of Limited Contributions and Expenditures](#)” on [page 14](#) for information on calculating the deadline for filing transactions if a committee has exceeded the \$5,000 threshold after filing a Certificate of Limited Contributions and Expenditures for a calendar year.

See [page 18](#) for the deadlines to report contributions received during a legislative session, and who is subject to those deadlines.

 All committees are considered active at the Primary and General Elections. See [pages 17](#) to determine if a committee is eligible to opt out of seven-day reporting for those elections.


# Schedule of Transaction Deadlines

## Initiative Petition Committees for Calendar Year 2025

transaction occurs:	deadline to file:
January 1 to December 31	30th day after date of transaction

- All dates are 2025 unless otherwise noted.
- The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.

 See [“Petition Committee Transaction Filing Deadlines”](#) on page 18 for transaction deadline information for referendum and recall petition committees.


 See [“Filing a Certificate of Limited Contributions and Expenditures”](#) on page 14 for information on calculating the deadline for filing transactions if a committee has exceeded the \$5,000 threshold after filing a Certificate of Limited Contributions and Expenditures for a calendar year.


# Schedule of Transaction Deadlines

## Initiative Petition Committees for Calendar Year 2026

<b>May 19 Primary Election</b>	
transaction occurs:	deadline to file:
on or before March 15	30th day after date of transaction
March 16 to April 6	April 14
April 7 to May 19	7th day after date of transaction
<b>July 2 Signature Submission Deadline</b>	
transaction occurs:	deadline to file:
May 20	May 28
May 21 to July 2	7th day after date of transaction
<b>November 3 General Election</b>	
transaction occurs:	deadline to file:
July 3 to August 30	30th day after date of transaction
August 31 to September 21	September 29
September 22 to November 3	7th day after date of transaction
November 4 to December 31	30th day after date of transaction

- All dates are 2026 unless otherwise noted.
- Generally, a transaction is due not later than 30 calendar days after the date of the transaction.
- Transactions that occur between the 42<sup>nd</sup> day before the election and Election Day are due no later than seven calendar days after the date of the transaction. A transaction that occurs prior to the 42<sup>nd</sup> day before the election and has not been filed by the 43<sup>rd</sup> day before the election, is due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the election, whichever date occurs first.
- Transactions that occur prior the 42<sup>nd</sup> day before the date that is four months before the general election and ending on the date that is four months before the general election are due no later than seven calendar days after the date of the transaction.
- Transactions that occur prior to the 42<sup>nd</sup> day before the date that is four months before the general election and have not been filed by the 43<sup>rd</sup> day before the date that is four months before the general election, are due not later than 30 calendar days after the date of the transaction or by the 35<sup>th</sup> day before the date that is four months before the general election, whichever date occurs first.
- The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.

 See [“Petition Committee Transaction Filing Deadlines”](#) on page 18 for transaction deadline information for referendum and recall petition committees.

 See [“Filing a Certificate of Limited Contributions and Expenditures”](#) on page 14 for information on calculating the deadline for filing transactions if a committee has exceeded the \$5,000 threshold after filing a Certificate of Limited Contributions and Expenditures for a calendar year.

# Schedule of Transaction Deadlines

## Independent Expenditure Filer for Calendar Year 2025

transaction occurs:	deadline to file:
January 1 – January 5	30th day after date of transaction
January 6 – January 27	February 4
January 28 – March 11	7th day after date of transaction
March 12 – March 16	30th day after date of transaction
March 17 – April 7	April 15
April 8 – May 20	7th day after date of transaction
May 21 – June 22	30th day after date of transaction
June 23 – July 14	July 22
July 15 – August 26	7th day after date of transaction
August 27 – August 31	30th day after date of transaction
September 1 – September 22	September 20
September 23 – November 4	7th day after date of transaction
November 5 – December 31	30th day after date of transaction

Not later than seven calendar days after exceeding the \$250 threshold in a calendar year, an independent expenditure filer is required to disclose all independent expenditures made on or after January 1 in that calendar year. Any subsequent independent expenditure made after the initial filings are required to be filed according to the 2025 schedule above. An independent expenditure filer is considered active at all elections and cannot opt out of seven-day reporting.

- The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.
- All dates are 2025.

# Schedule of Transaction Deadlines

## Independent Expenditure Filer for Calendar Year 2026

transaction occurs:	deadline to file:
January 1 – January 4	30th day after date of transaction
January 5 – January 26	February 3
January 27 – March 10	7th day after date of transaction
March 11 – March 15	30th day after date of transaction
March 16 – April 6	April 14
April 7 – May 19	7th day after date of transaction
May 20 – June 21	30th day after date of transaction
June 22 – July 13	July 21
July 14 – August 25	7th day after date of transaction
August 26 – August 30	30th day after date of transaction
August 31 – September 21	September 29
September 22 – November 3	7th day after date of transaction
November 4 – December 31	30th day after date of transaction


Not later than seven calendar days after exceeding the \$250 threshold in a calendar year, an independent expenditure filer is required to disclose all independent expenditures made on or after January 1 in that calendar year. Any subsequent independent expenditure made after the initial filings are required to be filed according to the 2024 schedule above. An Independent expenditure filer is considered active at all elections and cannot opt out of seven-day reporting.

- The deadline for filing transactions is not later than 11:59:00 pm on the day the transaction is due. If the deadline falls on a weekend or holiday, the transaction is due not later than 11:59:00 pm on the next business day.
- All dates are 2026.

## Transaction Types and Subtypes

A committee must choose a transaction type when creating each transaction. The transaction subtype choices that display in ORESTAR when creating a transaction are based on the transaction type that has been selected.

Of the six transaction types, the only one that is used by an independent expenditure filer is Expenditure.

 Each transaction type description below begins with information common to all subtypes. Each subtype then provides a list of required information and details specific to that subtype.

### Filing Transactions

After a transaction is entered and saved, you must also take steps to validate and file the transaction.

Refer to the [ORESTAR User's Manual: Transaction Filing](#) for instructions on validating and filing transactions after they have been entered and saved in the committee's Private Workshop.

Transaction Type	Available Transaction Subtypes
Contributions (page 27)	Cash Contribution In-Kind Contribution In-Kind/Forgiven Account Payable In-Kind/Forgiven Personal Expenditures Loan Received (Non-Exempt)
Expenditure (page 35)	Account Payable Cash Expenditure Loan Payment (Non-Exempt) Personal Expenditure for Reimbursement
Other Transactions (page 41)	Account Payable Rescinded Cash Balance Adjustment Loan Forgiven (Non-Exempt) Personal Expenditure Balance Adjustment
Other Account Receivable (page 44)	Miscellaneous Account Receivable
Other Disbursements (page 45)	Loan Payment (Exempt) Miscellaneous Other Disbursement Nonpartisan Activity Return or Refund of Contribution
Other Receipts (page 48)	Interest/Investment Income Items Sold at Fair Market Value Loan Received (Exempt) Lost or Returned Check Miscellaneous Other Receipt Refunds and Rebates

### Contributions

This section generally describes the term “contribution” under Oregon election law. Some moneys received by committees are not considered contributions.

Each cash contribution or loan received by a committee must be deposited into the committee's campaign account not later than seven business days after the date the money is received.

## Definition of Contribution

A contribution includes:

- the payment, loan, gift, forgiving of indebtedness, or furnishing without equivalent compensation or consideration, of money, services other than personal services for which no compensation is asked or given, supplies, equipment, or any other thing of value:
  - ✓ for the purpose of influencing an election for public office or an election on a measure, or of reducing the debt of a candidate for nomination or election to public office or the debt of a political committee, **or**
  - ✓ to or on behalf of a candidate, political committee, or measure.

If a contribution is made for compensation or consideration of less than equivalent value (e.g., the contributor receives something of value such as a t-shirt, dinner, or auction item), only the amount in excess value of the good or service is a contribution.



See [Fundraising Activities](#) page 62 for more information.

## Contributions Received by an Entity Other Than the Committee

If an individual or organization collects contributions on behalf of a candidate or committee, the contributions must be reported as being received from the person giving the contribution, not the collecting individual or organization that forwards the contributions. Violations may result in criminal penalties for making contributions in a false name. Any “person” engaging in this type of activity must deliver each contribution to the committee not later than seven business days after the contribution is received.



Contributions collected by an entity other than a committee, including connected organizations such as unions, associations, or online contribution services, are considered received by the committee once the contributions are in the physical custody of the committee or are electronically deposited in the committee’s campaign account, whichever is sooner.



Failure to deliver the contribution within the required seven business day deadline may result in the collecting individual or organization meeting the definition of a political committee, which would require the formation of a political committee and the filing of all campaign finance transactions in ORESTAR.

## Contribution of Stock

If a person contributes stock to a committee, the contributor is the person that is giving the stock to the committee. The contribution amount is the market value of the stock the day it is received.

If the stock is sold for more than the amount originally reported as a contribution, the difference is reported as an Other Receipt using subtype Interest/Investment Income. If it is sold for less than the amount originally reported the difference is reported as an Other Disbursement using subtype Investment Lost.

## Prohibited Contributions

### Anonymous Contributions



Warning: No committee or person associated with a committee shall accept anonymous contributions. This includes “passing a hat,” a “collection plate,” or setting out a “jar” to collect contributions.

If a committee receives a contribution and cannot identify the contributor, the contribution must be donated to an organization that can accept anonymous contributions. A committee is not required to report the receipt of the contribution if the committee has not deposited the contribution into the campaign account, and the contribution is disbursed within seven calendar days of receipt.

If the committee has kept the anonymous contribution for more than seven calendar days or has deposited it in the campaign account, the committee must disclose the receipt of the anonymous contribution as a cash contribution. When the committee donates the anonymous contribution, it should report the donation as a cash expenditure and include the transaction ID number of the previously reported anonymous contribution in the Description field.



See the [ORESTAR User’s Manual: Transaction Filing](#) for information on how to report an anonymous contribution.

### Cryptocurrency

A person may not make a contribution to a political candidate, a political committee or a petition committee using cryptocurrency. “Cryptocurrency” means digital or virtual currency that relies on cryptography to effect transfers and a decentralized network to record transactions.

### Contributions in a False Name

It is a criminal offense to make a contribution or donation or to directly or indirectly reimburse a person for making a contribution or donation relating to a candidate, measure, political committee, or petition committee in any name other than the person that provides the contribution (i.e., a contribution in a false name). Likewise, it is illegal to knowingly receive a contribution or donation in a false name or enter it into a committee’s account.



Warning: Making a contribution or donation in a false name is a class C felony, punishable by up to five years imprisonment and/or a \$125,000 fine.

### Foreign Nationals

Foreign nationals are prohibited by federal law from making political contributions to influence the election of any candidate. Only exclusive ballot measure committees may accept contributions from foreign nationals.

Foreign nationals include:

- individuals with foreign citizenship;
- immigrants not possessing a “green card”;
- foreign governments;
- foreign political parties;
- foreign corporations;
- foreign associations;
- and**
- foreign partnerships.

## Contributor Information

The Contributor field discloses the person who is the source of the contribution. The information that populates this field is based on the Address Book entry for the transaction.



See “[ORESTAR Address Book](#)” on pages 73 - 74 of this manual and the [ORESTAR User’s Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

The person signing the check is considered the contributor unless the signer is the trustee of a trust, or is the accountant for, or is otherwise exercising power of attorney for, the actual contributor.

However, if contributors specify that one check represents two or more contributions from a jointly-held checking account (e.g., in the memo bar of the check, verbal affirmation or by letter), a separate transaction is entered for each contributor. Contributors cannot be reported jointly (i.e., John and Jane Doe).

## Contributor Name Information

The name for an Address Book record is the full name of the person making the contribution. “Person” includes an individual, corporation, limited liability company, labor organization, association, firm, partnership, joint stock company, club, organization, or other combination of individuals having collective capacity.



Generally, do not use acronyms or initials in place of the full name of the contributor unless the acronym or initials are the full name or registered business name of the contributor.

## Contributor Address

The address includes the street number and street name or post office box, along with the city, state, and zip code. For individual contributors, “address” means the place where the individual receives correspondence (e.g., personal residence, post office box, or place of employment). For a contributor with a foreign address the address must include the street address, city/province/region, country, and postal code.

Do not list an address that is exempt from public disclosure. If the contributor’s address is exempt from public disclosure; use another address where the contributor receives correspondence.

## Occupational Information

Oregon election law requires occupational information for each individual contributor. If the individual is employed, the employer (name, city, and state where located) must also be provided. If the individual is self-employed, indicate “Self-Employed.” If the contributor is not employed, such as a homemaker, student, retired person, or a volunteer, indicate “Not Employed.”

To be considered sufficient, the occupational information must include enough information for an average member of the voting public to understand the nature of the contributor’s primary job or the nature of their business. The Elections Division considers the information provided in the Occupation and Employer Information fields collectively and in context when determining whether the information provided is sufficient.

### **Occupation**


Occupation is the nature of the individual’s primary job if employed or nature of the individual’s business if self-employed (e.g., real estate broker, restaurant owner, campaign consultant, radio station owner, etc.). Titles, industry names, or other generic descriptors (e.g., business, business owner, company owner, owner, self-employed, small business owner) that do not convey the nature of the business or work performed are not sufficient when a contributor is self-employed.

### *Employer's Name and Address*

Employer's name and address are the company's legal name and the city and state where the company is physically located. Do not use an acronym unless the registered name of the employer includes the acronym. Employer information is not entered for an individual who is self-employed or not employed.

## Occupation Letter Date

If a committee receives a contribution from an individual that does not identify both components of the contributor's occupational information, the committee must send a letter or email to the contributor within seven calendar days after receiving the contribution asking the contributor to provide occupational information.

 A separate letter or email must be sent for each contribution transaction in which the occupational information is not submitted.

If a contribution transaction must be filed before the occupational information is received, documentation showing the occupational information was requested within seven calendar days of receipt of the contribution is required. Documentation consists of both of the following:

→ reporting the date the letter was mailed or emailed to the contributor

**and**

→ retaining a copy of the dated letter addressed or email sent to the contributor as part of the committee's records.

 See [Retention of Records](#) on page 75.

## Calendar Year Aggregate


This field is required if a committee has opted out of the ORESTAR system-calculated aggregate function and applies only to transaction types Contribution and Expenditure.


 See [Calculating a Transaction's Calendar Year Aggregate](#) on page 72 for more information.


## Additional Data Fields Required for Contributions Based on Subtype

### Cash Contribution

A cash contribution includes cash, checks, or any legal instrument redeemable as currency, transmitted via physical or electronic means.

 A candidate, political committee or a petition committee may not accept aggregate contributions from a single source of more than \$100 per calendar year in the form of physical currency of the United States or of any other country.

 Within one calendar year, a committee may accept up to the equivalent of one \$100 bill in paper money and coins from a single source.

 If a contribution is from an out-of-state contributor, that transaction will be highlighted in the color red when it is filed in ORESTAR.

### *Date of a Cash Contribution*

The date the contribution or loan was received in the committee's physical custody.

If the contribution or loan is received by Electronic Funds Transfer (EFT), the transaction date is the date the contribution is credited to the committee's campaign account.

If the contribution or loan is received via an online merchant account, the transaction date is the date the committee can access the funds to facilitate the transfer of the money from the merchant account to the committee's bank account.

If the contribution or loan is collected by credit card, the transaction date is the date the committee processed the credit card, not the date the credit card information is received.

If stock is contributed, the transaction date is when the committee receives notice either of the authorization or of the completion of the transfer, whichever notification occurs first.



It is not the date the check was written, the postmark on the envelope, the date the contribution was placed in the recipient's post office box, or the date the contribution was deposited in the committee's campaign account.

### ***Contributor***

See [Contributor Information](#) above.

### ***Amount***

Use the full amount contributed.

### ***Description and/or Purpose***

These fields are not required for Cash Contribution transactions.

### ***Occupation Letter Date***

This field is only required if sufficient occupational information is not included in the contributor's address book entry. See [Occupation Letter Date](#) on page 31 for additional information.

### ***Notes***

This field is not required for Cash Contribution transactions.

## **In-Kind Contribution**

An in-kind contribution is a good or service, other than money, having monetary value. The value is based on the fair market value of the good or service. Fair market value is the dollar amount a consumer would expect to pay for the good or service.

### ***Date of an In-Kind Contribution***

The date the candidate, treasurer or any agent of the committee has knowledge of the in-kind contribution and the goods or services have been purchased or provided.



The date written notification of the in-kind contribution from another political or petition committee is received is not the date of the in-kind contribution **if the candidate, treasurer or any agent of the committee had knowledge of the in-kind contribution and received the goods or services prior to receiving the written notification.** See [In-Kind Expenditure Notification Requirement](#) on page 37 for more information about the in-kind contribution written notification requirement.

### ***Contributor***

See [Contributor Information](#) above.

**Amount**

Use the fair market value of the contribution.

**Description and/or Purpose**

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

**Occupation Letter Date**

This field is only required when sufficient occupational information is not included in the contributor's address book entry. See [Occupation Letter Date](#) on page 31 for additional information.

**Notes**

This field is not required for In-Kind Contribution transactions. See page 53 for more information.

## In-Kind/Forgiven Account Payable

This transaction subtype is used when a previously reported account payable is forgiven by the creditor.

**Date of an In-Kind/Forgiven Account Payable**

Use the date the account payable was forgiven.

**Contributor**

See [Contributor Information](#) above.

**Amount**

Use the amount of the account payable that was forgiven.

**Description and/or Purpose**

These fields are not required for Cash Contribution transactions.

**Occupation Letter Date**

This field is only required if sufficient occupational information is not included in the contributor's address book entry. See [Occupation Letter Date](#) on page 31 for additional information.

**Notes**

This field is not required for In-Kind/Forgiven Account Payable transactions. See page 53 for more information.

**Transaction Association**

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on completing the Transaction Association information Associate: partial amount is forgiven

Associate: partial amount is forgiven

Complete: full amount is forgiven

## In-Kind/Forgiven Personal Expenditures

This transaction subtype is used when previously reported personal expenditures for reimbursement are forgiven by the person who made the personal expenditures.

**Date of In-Kind/Forgiven Personal Expenditures**

Use the date the personal expenditure was forgiven.

**Contributor**

See [Contributor Information](#) above.

**Amount**

Use the amount of personal expenditures forgiven by the person.

**Description and/or Purpose**

These fields are not required for In-Kind/Forgiven Personal Expenditures transactions.

**Occupation Letter Date**

This field is only required if sufficient occupational information is not included in the contributor's address book entry. See [Occupation Letter Date](#) on page 31 for additional information.

**Notes**

This field is not required for In-Kind/Forgiven Personal Expenditures transactions. See page 53 for more information.

**Transaction Association**

Do not associate this transaction to the previously reported Personal Expenditure transaction(s).

**Loan Received (Non-Exempt)**

A non-exempt loan is generally from a source other than a financial institution. All non-exempt loans received must be itemized, regardless of the amount. A committee must obtain the name and address of the lender holding the loan and the total amount of the loan; the terms of the loan, including the interest rate and repayment schedule must be disclosed when filing the transaction.



It is permissible to receive loans with an interest rate of zero and repayment schedule of "payable when funds available." Loan agreements must be preserved in writing for at least two years after the loan transaction is filed, or until the loan is repaid, whichever is later.

Outstanding loans may not be transferred to another committee.

Each endorser or guarantor of an exempt or non-exempt loan received is considered a contributor and must be reported unless the endorser or guarantor is the candidate's spouse.

**Date of a Loan Received (Non-Exempt)**

The date the loan was received in the committee's physical custody.

If the loan is received by Electronic Funds Transfer (EFT), the transaction date is the date the loan is credited to the committee's campaign account.

If the loan is received via an online merchant account, the transaction date is the date the committee can access the funds to facilitate the transfer of the money from the merchant account to the committee's bank account.

If the loan is collected by credit card, the transaction date is the date the committee processed the credit card, not the date the credit card information is received.



It is not the date the check was written, the postmark on the envelope, the date the contribution was placed in the recipient's post office box, or the date the contribution was deposited in the committee's campaign account.

### **Contributor**

See [Contributor Information](#) above.

### **Amount**

Use the loan amount.

### **Interest Rate**

Enter the interest rate for the loan. If there is no interest rate attached to the loan, enter "0" (zero).

### **Repayment Schedule**

If there is no repayment schedule, indicate "payable when funds available."

### **Description and/or Purpose**

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

### **Occupation Letter Date**

This field is only required if sufficient occupational information is not included in the contributor's address book entry. See [Occupation Letter Date](#) on page 31 for additional information.

### **Notes**

This field is not required for Loan Received (Non-Exempt) transactions. See page 53 for more information.

## **Expenditure**

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This section generally describes the term "expenditure" under Oregon election law. Some payments made by committees are not considered expenditures. These are [Other Disbursements](#) and are discussed on page 45.


### **Definition of Expenditure**

An expenditure includes:

- payment or furnishing of money or any other thing of value;
  - incurring or repayment of indebtedness or obligation by or on behalf of a candidate, committee, or person in consideration for any services, supplies, or equipment;
  - any other thing of value performed or furnished for any reason, including support of or opposition to a candidate, committee, or measure;
  - reducing the debt of a candidate for nomination or election to public office;
- or**
- contributions made by a candidate or committee to or on behalf of any other candidate or committee.

All expenditures made by a committee must be drawn from the campaign account and either issued on a check signed by the candidate or treasurer of the committee or by any other individual designated as a signer on the account or paid using a committee credit card, debit card, or other form of electronic transmission. This does not prohibit a person from making a personal expenditure on behalf of the committee and receiving reimbursement from the campaign account.

 Funds that are still part of the committee's assets, such as funds transferred between checking and savings accounts or funds held for change at a fundraiser, are not expenditures and should not be reported.

 A committee must not maintain a petty cash fund for making incidental expenditures. Expenditures in the form of currency are prohibited under ORS 260.054.


## Payee Information

This field discloses the person who is the source of the goods, or services received by the committee, or to whom the committee is making an expenditure. The information that populates this field is based on the Address Book entry for the transaction.

### Payee Name Information

Use the name to whom payment is made or owed.

The name for an Address Book record is the full name of the person associated to the address book entry. Person includes an individual, corporation, limited liability company, labor organization, association, firm, partnership, joint stock company, club, organization, or other combination of individuals having collective capacity.

 Generally, do not use acronyms or initials in place of the full name of the payee unless the acronym or initials are the full name or registered business name of the payee.

 See "[ORESTAR Address Book](#)" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

If the committee uses a credit or debit card issued in the committee name, the payee is the business or individual accepting the card as payment.

 See page 62 "[Reporting Credit/Debit Card Transactions.](#)"

If a committee uses a payroll processing company to process its payroll, the committee reports the name of the payroll company as the payee unless the payroll processing company issues a check or payment directly from the committee's account, in which case the payee is who the check is made payable to.


### Address for a Payee

The payee's address is the city and state where the payee is located, or county if the payee is not located in a city. For payee in a foreign country, the address is the city/province/region, and country. A corporate address is acceptable. Do not list a payee address that is exempt from public disclosure. Payees must provide a disclosable address.

## How to Report In-Kind or Independent Expenditure Information

### In-Kind Expenditure Information


If a committee makes an expenditure for a good or service, and the expenditure is an in-kind contribution to another committee, the expenditure transaction must disclose In-Kind Expenditure Information identifying the committee(s) that received the in-kind contribution and the amount of the in-kind contribution.

 If an expenditure transaction is identified as an in-kind contribution to another committee, that transaction will be highlighted in the color green when it is filed in ORESTAR.

### In-Kind Expenditure Notification Requirement

The committee making the expenditure is required to notify the candidate or committee via letter or email of the in-kind contribution; notification must be made not later than 48 hours after the expenditure has been filed in ORESTAR. Failure to notify the candidate or committee within the time frame specified may result in a civil penalty.

### In-Kind Expenditure Benefitting Multiple Committees: Reporting Requirement

 Jane Doe is a candidate for state senate and is holding a fundraiser for herself. Featured guests at the fundraiser are the two house candidates in her senate district from the same political party, Tom Jones and Fred Brown. Jane mails an invitational flyer to a district-wide list of potential supporters at a cost of \$500. Because both Tom and Fred are also on the ballot, Jane's invitation benefits their candidacies as well. Her \$500 expenditure is reported for each candidate which includes the committee name and amount apportioned to each candidate. In this example the amount apportioned to each candidate is \$125, as each of their districts is one-half the size of Jane's.

Each candidate reports an in-kind contribution of \$125 from Jane's committee.

### Independent Expenditure Information

If a committee or independent expenditure filer makes an independent expenditure (e.g., the expenditure is NOT coordinated with any agent of the candidate or committee), the independent expenditure must disclose Independent Expenditure information identifying the candidate, measure or political party, indicate support or opposition and the amount apportioned to the candidate, measure or political party.

### Calendar Year Aggregate


This field is required if a committee has opted out of the ORESTAR system-calculated aggregate function and applies only to transaction types Contribution and Expenditure.

 See [Calculating a Transaction's Calendar Year Aggregate](#) on page 72 for more information.

## Additional Data Fields Required for Expenditures Based on Subtype

### Account Payable

An account payable is an amount owed by the committee to a creditor for the purchase of goods or services. There is an exception to the requirement of reporting an account payable. If the committee makes the expenditure to pay the account payable before the due date for filing the account payable transaction, the Account Payable is not required to be reported.

-  If a committee active at the 2024 Primary Election incurs an account payable on April 23, 2024, and the payable is paid on or before April 30, 2024 (the deadline to file the transaction), the committee is not required to file the account payable. However, if the payable is not paid by April 30, 2024, the committee is required to file the payable no later than April 30, 2024, 11:59:00 pm and then must file a separate cash expenditure transaction when the payable is paid.

#### *Date of Account Payable*

Use the date an order is placed for goods or services and payment is not made when the order is placed. It is not the date of the invoice or the date the committee receives the invoice.

#### *Payee*

See [Payee Information](#) above.

#### *Amount*

The amount for an Account Payable transaction can be an estimate or “price quote.” If the committee is not provided an estimate of the cost of the goods or services, they may use their own estimate of the cost for reporting purposes. Do not amend the amount of the account payable transaction if the final amount billed or invoiced is different from the amount originally reported. Do not enter a dollar sign when entering the amount.

#### *Description and/or Purpose*

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

#### *Notes*

This field is not required for Account Payable transactions. See page 53 for more information.

#### *In-Kind or Independent Expenditure Information*

In-kind or Independent Expenditure Information must be completed for a transaction if:

- the account payable is an in-kind contribution to another candidate or committee;
- the account payable is an independent expenditure for a communication supporting or opposing a candidate or measure; or
- the account payable is an independent expenditure that is a communication that refers to a candidate or political party and is disseminated to the relevant electorate 30 days before the primary election or 60 days before the general election.

The transaction must:

- be identified as either an in-kind expenditure or independent expenditure;
- identify the candidate(s), committee(s), or measure(s) supported or opposed by the expenditure;
- include the amount apportioned to each candidate, committee or measure(s); and
- identify “support” or “oppose” if it is an independent expenditure.



See the [ORESTAR User’s Manual: Transaction Filing](#) for detailed instructions about completing the in-kind or independent expenditure information.

## Cash Expenditure

Cash expenditures are expenditures drawn from the committee's account in the form of check, credit card, debit card, or other electronic transmission.

### *Date of Cash Expenditure*

Use the date written on the check, the date an electronic check is issued, for an online bill pay system the date the funds are withdrawn from the account, or the date the committee's credit or debit card is used.



It is not the date of the credit card statement or the date of payment to the credit card company.

Bank Service Charge: the transaction date is the date the committee receives the statement reporting the service charge amount.

Electronic Funds Transfer (EFT): the transaction date is the date the expenditure is withdrawn from the committee's account.



It is not the date the committee receives the bank statement that reports the amount of the electronic funds transfer.

### *Payee*

See [Payee Information](#) above. When reporting an expenditure from committee funds to reimburse a person for reported personal expenditures for reimbursement, the payee is the person receiving reimbursement (who the check is made payable to).

### *Payment Method*

Indicate whether the expenditure is being made by Check, Credit Card, Debit Card, Electronic Check, or Electronic Funds Transfer.

### *Check Number*

This field is only required if the Payment Method is "check." Use the number of the check issued by the committee. Do not enter a check number unless the payment method is Check or Electronic Check. Do not report voided checks. If a check does not have a printed or hand-written check number (such as a counter check or money order) enter "counter check" or "money order" in the Description field.

### *Amount*

Use the transaction amount. Do not enter a dollar sign when entering the amount.

### *Description and/or Purpose*

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

### *Notes*

This field is not required for Cash Expenditure transactions. See page 53 for more information.

### *Transaction Association*

This transaction subtype requires an "association" if the expenditure is to pay a previously reported account payable transaction.

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Account Payable.

Associate: partial amount is paid

Complete: full account payable is paid. It is possible that the amount for the expenditure(s) will not match the amount of the account payable. This is allowed and marking the account payable as “complete” will ensure the accuracy of the ORESTAR account summary.

### ***In-Kind or Independent Expenditure Information***

In-kind or Independent Expenditure Information must be completed for a transaction if:

- a cash expenditure is an in-kind contribution to another candidate or committee;
- a cash expenditure is an independent expenditure for a communication supporting or opposing a candidate or measure; or
- a cash expenditure is an independent expenditure that is a communication that refers to a candidate or political party and is disseminated to the relevant electorate 30 days before the primary election or 60 days before the general election.

The transaction must:

- be identified as either an in-kind expenditure or independent expenditure;
- identify the candidate(s), committee(s), or measure(s) supported or opposed by the expenditure;
- include the amount apportioned to each candidate, committee or measure(s); and
- identify “support” or “oppose” if it is an independent expenditure.



See the [ORESTAR User’s Manual: Transaction Filing](#) for detailed instructions about completing the in-kind or independent expenditure information.

## **Loan Payment (Non-Exempt)**

A non-exempt loan payment is an expenditure made to reduce an outstanding non-exempt loan balance. Each non-exempt loan payment must be itemized regardless of the amount.

### ***Date of Loan Payment (Non-Exempt)***

Use the date written on the check, the date an electronic check is issued, for an online bill pay system the date the funds are withdrawn from the account, or the date the committee’s credit or debit card is used.



It is not the date of the credit card statement or the date of payment to the credit card company.

Electronic Funds Transfer (EFT): the transaction date is the date the payment is withdrawn from the committee’s account.



It is not the date the committee receives the bank statement that reports the amount of the electronic funds transfer.

### ***Payee***

See [Payee Information](#) above.

### ***Payment Method***

Indicate whether the expenditure is being made by Check, Credit Card, Debit Card, Electronic Check, and Electronic Funds Transfer.

### ***Check Number***

This field is only required if the Payment Method is “check.” Use the number of the check issued by the committee. Do not enter a check number unless the payment method is Check or Electronic Check. Do

not report voided checks. If a check does not have a printed or hand-written check number (such as a counter check or money order) enter “counter check” or “money order” in the Description field.

### **Amount**

Use the loan payment amount.

### **Description and/or Purpose**

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

### **Notes**

This field is not required for Loan Received (Non-Exempt) transactions. See page 53 for more information.

### **Transaction Association**

This transaction subtype requires an “association” to the previously reported loan received (non-exempt) transaction.

See [Transaction Association](#) page 55 and the [ORESTAR User’s Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype loan received (non-exempt).

Associate: the payment partially satisfies the loan

Complete: the payment fully satisfies the loan. This is the last payment.

## **Personal Expenditure for Reimbursement**

An expenditure by a person, including a political or petition committee, from the person’s funds, made on behalf of a committee, is a personal expenditure for reimbursement if the person expects to be reimbursed from committee funds. If the person does not want reimbursement, then an in-kind contribution transaction (from the person) must be reported.

The expenditure made by the person is required to be reported, in addition to the transaction made to reimburse the person who made the personal expenditure. The name of the person making the personal expenditure (Payer of Personal Expenditure) and where the person spent their money (Payee) is required to be disclosed when reporting a personal expenditure for reimbursement. See [Personal Expenditures](#) page 58 - 61 for an example of how to report this kind of transaction.

### **Date of Personal Expenditure for Reimbursement**

Use the date a person makes an expenditure (by cash, check, credit card, debit card, etc.) from personal funds on behalf of the committee and expects repayment.

### **Payer of Personal Expenditure**

The name of the person that makes an expenditure from the person’s funds on behalf of the committee and wants reimbursement.

### **Payee**

See [Payee Information](#) above. The name of the person or business receiving the personal funds.

### **Amount**

Use the transaction amount.

### **Description and/or Purpose**

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

### **Notes**

This field is not required for Personal Expenditure for Reimbursement transactions. See page 53 for more information.

## **Other Transactions**

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### **Definition of Other Transactions**

A committee uses transaction type Other when an account payable is no longer owed, a non-exempt loan is forgiven, the outstanding personal expenditure balance on the committee's account summary cannot be reconciled, or if the committee's campaign account balance does not match the cash balance reported in ORESTAR.

### **Additional Data Fields for Other Transactions Based on Subtype**

#### **Account Payable Rescinded**

This subtype is used if a previously reported account payable is no longer owed because the payable is disputed or if it is later determined that the payable invoice was sent in error and the committee is not obligated to pay the account payable that was previously reported.

#### ***Date of Account Payable Rescinded***

Use the date the committee determines that the payable is disputed and no longer owed or the date a contract is cancelled.

#### ***Payee***

This field discloses the person rescinding the account payable. The information that populates this field is based on the Address Book entry for the transaction.



See "ORESTAR Address Book" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### ***Amount***

Use the amount rescinded.

#### ***Description and/or Purpose***

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

#### ***Notes***

This field is not required for Account Payable Rescinded transactions. See page 53 for more information.

#### ***Transaction Association***

Associate the transaction to the previously reported Account Payable.

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Account Payable.

Associate: partial amount is rescinded

Complete: full amount is rescinded

## Cash Balance Adjustment

This subtype is used to make an adjustment to the committee's cash balance on its Account Summary to match the balance in the committee's campaign account. This transaction should be filed only if the committee has exhausted all efforts to determine why there is a discrepancy between the Account Summary cash balance and the cash balance in the committee's campaign account.

### *Date of Cash Balance Adjustment*

Use the date the committee determines that it cannot reconcile the committee's campaign account balance to match the cash balance as reported on the committee's Account Summary in ORESTAR.

### *Amount*

Use the amount the balance should be adjusted by. To subtract amount from balance, enter a negative sign in front of the amount or use parenthesis.

### *Description*

Enter "To match bank balance."

### *Notes*

This field is not required for Cash Balance Adjustment transactions. See page 53 for more information.



Filing a Cash Balance Adjustment may result in a civil penalty.

## Loan Forgiven (Non-Exempt)

This subtype is used if a previously reported non-exempt loan received is forgiven by the lender.

### *Date of Loan Forgiven (Non-Exempt)*

Use the date the loan is forgiven or paid by another person.

### *Payee*

This field discloses the person who is forgiving a non-exempt loan. The information that populates this field is based on the Address Book entry for the transaction.



See "ORESTAR Address Book" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

### *Amount*

Use the amount forgiven.

### *Description and/or Purpose*

These fields are not required for Loan Forgiven (Non-Exempt) transactions.

### *Notes*

This field is not required for Loan Forgiven (Non-Exempt) transactions. See page 53 for more information.

### *Transaction Association*

Associate to the previously reported Loan Received (Non-Exempt).

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Loan Forgiven (Exempt).

Associate: partial amount is forgiven

Complete: full amount is forgiven

## Personal Expenditure Balance Adjustment

This subtype is used to make an adjustment to the committee's outstanding personal expenditure balance on its Account Summary. This transaction should be filed only if the committee has exhausted all efforts to determine why there is a discrepancy between the Account Summary Outstanding Personal Expenditure Balance and what the committee believes the balance should be.

### *Date of Personal Expenditure Balance Adjustment*

Use the date the committee determines the committee's outstanding personal expenditure balance is not accurate on the committee's Account Summary in ORESTAR.



Filing a Personal Expenditure Balance Adjustment may result in a civil penalty.

### *Amount*

Use the amount the balance should be adjusted by. To subtract amount from balance, enter a negative sign in front of the amount or use parenthesis.

### *Description*

Enter "To match committee records."

### *Notes*

This field is not required for Personal Expenditure Balance Adjustment transactions. See page 53 for more information.

## Other Account Receivable

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This section generally describes the term "other account receivable" under Oregon election law.

### Definition of Other Account Receivable

Other Account Receivable is money that the committee expects to receive that is exempt from being considered a contribution.

### Data Fields Required for Other Account Receivable Based on Subtype

#### Miscellaneous Account Receivable

This is the only subtype used to report an Other Account Receivable. This subtype includes the receivable associated with a loan extended by a committee, or to report the fair market value of auction/fundraising proceeds that have not been collected.

#### *Date of Miscellaneous Account Receivable*

The date the committee makes an expenditure for a loan, or the date of the auction to report the fair market value of auction/fundraising proceeds that have not yet been collected, or the date the committee makes an expenditure for a deposit. All of these actions require the committee to file a

miscellaneous account receivable transaction to reflect the committee is expecting to receive money from some source.

### ***Contributor/Payee***

This field discloses the person from whom the committee expects to receive money. The information that populates this field is based on the Address Book entry for the transaction.



See “ORESTAR Address Book” on pages 73 - 74 of this manual and the [ORESTAR User’s Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

### ***Amount***

Use the transaction amount.

### ***Description and/or Purpose***

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

### ***Notes***

This field is not required for Miscellaneous Account Receivable transactions. See page 53 for more information.

## **Other Disbursements**

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This section generally describes the term “other disbursements.” Some expenditures made by committees are reportable but not considered an “expenditure” for reporting purposes.

### **Data Fields Required for Other Disbursements Based on Subtype**

#### **Loan Payment (Exempt)**

This subtype is used to report a payment on the principal of an exempt loan. Any interest payment on an exempt loan is reported as a cash expenditure.

#### ***Date of Loan Payment (Exempt)***

The transaction date for an Other Disbursement is the date written on the check, the date the committee’s credit or debit card is used, or the date of the EFT.

#### ***Payee***

This field discloses the person to whom the loan payment is made. The information that populates this field is based on the Address Book entry for the transaction.



See “ORESTAR Address Book” on pages 73 - 74 of this manual and the [ORESTAR User’s Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### ***Payment method***

This field is not required for Loan Payment (Exempt) transactions.

#### ***Amount***

Use the amount of the loan payment.

#### ***Description and/or Purpose***

These fields are not required for Loan Payment (Exempt) transactions.

**Notes**

This field is not required for Loan Payment (Exempt) transactions. See page 53 for more information.

**Transaction Association**

Associate to the previously reported Loan Received (Exempt).

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Loan Forgiven (Exempt).

Associate: the loan payment does not fully satisfy the loan

Complete: the loan payment fully satisfies the loan. This is the last payment.



**Miscellaneous Other Disbursement**

This subtype is used when the committee needs to report a loss on an investment or expenses for the preparation and distribution of slate cards and sample ballots by state or local political party committees that meet the criteria set forth below, or if the committee makes an expenditure for a purpose that is not political and therefore does not meet the definition of an expenditure.

A slate card or sample ballot must meet both of the following criteria to qualify as a Miscellaneous Other Disbursement:

- contains the names of at least three candidates running for election to any public office within the state;
- and**
- is not distributed through public advertising such as broadcast media, newspapers, magazines, or billboards.

If the above criteria are not met, the committee will report the transactions associated with the preparation and distribution of the sample ballot or slate card as expenditures.

-  If any committee other than a political party committee or an independent expenditure filer makes expenditures to produce slate cards and sample ballots, those transactions are reported as cash expenditures.
-  Using this subtype requires information in the Description field of the transaction to explain the purpose of the disbursement.


**Date of Miscellaneous Other Disbursement**

The transaction date for an Other Disbursement is the date written on the check, the date the committee's credit or debit card is used, or the date of the EFT.

The date for reporting a loss on an investment is the date the committee receives the statement reporting the loss.

**Payee**

This field discloses the person to whom the Miscellaneous Other Disbursement is made. The information that populates this field is based on the Address Book entry for the transaction.

-  See "[ORESTAR Address Book](#)" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

**Payment method**

This field is not required for Miscellaneous Other Disbursement transactions.

**Amount**

Use the transaction amount.

**Description and/or Purpose**

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

**Notes**

This field is not required for Miscellaneous Other Disbursement transactions. See page 53 for more information.

**Nonpartisan Activity**

This subtype is used to report activity designed to encourage individuals to vote or to register to vote, regardless of party affiliation.

**Date of Nonpartisan Activity**

The transaction date for Nonpartisan Activity is the date written on the check, the date the committee's credit or debit card is used, or the date of the EFT.

**Contributor/Payee**

This field is not required for Nonpartisan Activity transactions.

**Payment method**

This field is not required for Nonpartisan Activity transactions.

**Amount**

Use the transaction amount.

**Description and/or Purpose**

These fields are not required for Nonpartisan Activity transactions.

**Notes**

This field is not required for Nonpartisan Activity transactions. See page 53 for more information.

**Return or Refund of Contribution**

This subtype is used if a contribution is returned more than seven calendar days after receipt or is deposited in the campaign account prior to the refund being issued, or if a reported contribution is returned by the financial institution for insufficient funds.



Contributions received by the committee and returned to the contributor within seven calendar days of receipt without being deposited in the campaign account are not reportable.

A contribution received by a committee subject to reporting contributions received during a legislative session that is returned within two business days of receipt without being deposited in the campaign account is also not reportable.

**Date of Return or Refund of Contribution**

The transaction date Return or Refund of Contribution is the date written on the check, the date the committee's credit or debit card is used, or the date of the EFT.

**Payee**

This field discloses the person to whom the contribution is returned or refunded. The information that populates this field is based on the Address Book entry for the transaction.



See “ORESTAR Address Book” on pages 73 - 74 of this manual and the [ORESTAR User’s Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### ***Payment method***

This field is not required for Return or Refund of Contribution transactions.

#### ***Amount***

Use the amount returned or refunded.

#### ***Description and/or Purpose***

These fields are not required for Return or Refund of Contribution transactions.

#### ***Notes***

This field is not required for Return or Refund of Contribution transactions. See page 53 for more information.

#### ***Transaction Association***

Associate with the previously reported contribution.

See [Transaction Association](#) page 55 and the [ORESTAR User’s Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Loan Forgiven (Exempt).

Associate: returning or refunding a portion of the contribution

Complete: returning or refunding the full contribution

## **Other Receipts**

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This section generally describes the term “other receipts.”

### **Definition of Other Receipt**

An “other receipt” is money received by a committee that does not meet the definition of contribution but still is reportable.

### **Data Fields Required for Other Receipt Based on Subtype**

#### **Interest/Investment Income**

This subtype includes interest earned from bank accounts, certificates of deposit, proceeds earned from invested funds, and dividends earned on securities.

##### ***Date of Interest/Investment Income***

The date that the committee receives the statement reporting the amount of interest earned or investment income. If a committee liquidates stock and the value has increased after reporting the receipt of the original contribution, the date for reporting the investment income is the date the stock is liquidated.

##### ***Contributor***

This field is not required for Interest/Investment Income transactions.

**Amount**

Use the amount of interest or investment income.

**Description and/or Purpose**

These fields are not required for Interest/Investment Income transactions.

**Notes**

This field is not required for Interest/Investment Income transactions. See page 53 for more information.

**Items Sold at Fair Market Value**

When a contributor receives a good or service in return for a portion of a contribution, such as dinner or a t-shirt, only the amount in excess of the fair market value of the item or service received is a contribution. The fair market value amount is a reportable other receipt. Moneys received on a single day which qualifies as Items Sold at Fair Market Value may be totaled and reported as one transaction.



Fair market value is the dollar amount a consumer would expect to pay for the good or service. See pages 62- 66 for more information on reporting [Fundraising Activities](#).

**Date of Items Sold at Fair Market Value**

The date funds are received for the item sold at fair market value.

**Contributor**

This field is not required for Items Sold at Fair Market Value transactions.

**Amount**

Use the transaction amount.

**Description and/or Purpose**

These fields are not required for Items Sold at Fair Market Value transactions.

**Notes**

This field is not required for Items Sold at Fair Market Value transactions. See page 53 for more information.

**Transaction Association**

If this transaction applies to a previously reported Miscellaneous Account Receivable, the two transactions should be associated. Otherwise, an association is not required.

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Miscellaneous Account Receivable.

Associate: the sale does not fully satisfy the receivable.


Complete: the sale fully satisfies the receivable. This is the last payment.

**Loan Received (Exempt)**

Loans received (including a line of credit) from a financial institution are exempt if the loan meets all of the following conditions:

- bears the institution's usual and customary interest rate for the category of loan involved;
- is made on a basis that ensures repayment;

- is evidenced by a written instrument; **and**
- is subject to a due date or amortization schedule.

 Loan agreements must be preserved in writing for at least two years after the loan transaction is filed, or until the loan is repaid, whichever is later.

The terms of the loan, including the interest rate and repayment schedule, must be disclosed. If a loan fails to meet all of the above conditions, it is a non-exempt loan and is reported as a contribution from the lending institution.

 See “[Loan Received \(Non-Exempt\)](#)” on page 34.

### Methods of Ensuring Repayment

A committee may use the following traditional methods of securing the loan:


- Collateral: A loan may be secured using assets of the candidate or committee, such as real estate, personal property, cash on deposit, certificates of deposit, or stocks. The fair market value of the assets must, on the date of the loan, equal or exceed the amount of the loan and any senior liens. The committee must ensure that the financial institution has established a “perfected security interest” in the collateral (i.e., the committee has taken steps to legally protect the institution’s interest in the collateral in the event that the committee defaults on the loan);
- or
- Endorsements or Guarantees: An endorser or guarantor of an exempt loan is considered a contributor. However, if the committee receiving the loan is a candidate committee and the guarantor is the candidate’s spouse, the spouse is not reported as a contributor.

#### *Date of Loan Received (Exempt)*

The date the loan is received in the committee’s physical custody.

#### *Contributor/Payee*

This field discloses the institution/person providing the loan. The information that populates this field is based on the Address Book entry for the transaction.

 See “[ORESTAR Address Book](#)” on pages 73 - 74 of this manual and the [ORESTAR User’s Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### *Amount*

Use the loan amount.

#### *Interest Rate*

This field is required when disclosing a Loan Received (Exempt).

#### *Repayment Schedule*

This field is required when disclosing a Loan Received (Exempt).

#### *Description and/or Purpose*

These fields are not required for Loan Received (Exempt) transactions.

#### *Notes*

This field is not required for Loan Received (Exempt) transactions. See page 53 for more information.

***Co-Signer Obligation***

This field is only required if the loan has a cosigner. Each endorser or guarantor of an exempt or non-exempt loan received is considered a contributor and must be reported, unless the guarantor is the candidate's spouse.



See the [ORESTAR User's Manual: Transaction Filing](#) for detailed instructions about completing the co-signer obligation information when entering a transaction.

**Lost or Returned Check**

This subtype is used when a check issued by the committee has not been cashed, the committee no longer expects it to be cashed, the check is returned for insufficient funds, a stop payment is ordered on a check which was issued, or when a portion or the full amount of a contribution is returned to a committee (previously reported as an expenditure by the committee.)



If the committee issues a replacement check for one that has been lost or returned or for insufficient funds, the committee reports the replacement check as a cash expenditure.

***Date of Lost or Returned Check***

The date the committee orders a stop payment on the check, the date the committee reissues a replacement check, the date the committee no longer expects the check to be cashed, or the date the committee is notified that a check is returned for insufficient funds, whichever occurs first.

***Contributor/Payee***

This field discloses the person who wrote the check that has been returned. The information that populates this field is based on the Address Book entry for the transaction.



See "[ORESTAR Address Book](#)" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

***Amount***

Use the amount of the lost or returned check.

***Description and/or Purpose***

These fields are not required for Lost or Returned Check transactions.

***Notes***

This field is not required for Lost or Returned Check transactions. See page 53 for more information.

***Transaction Association***

Associate the transaction to the previously reported expenditure.

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Lost or Returned Check.

Associate: a portion of the check is returned.

Complete: the full check amount was lost or returned.

**Miscellaneous Other Receipt**

Miscellaneous other receipts include the receipt of payments to reduce a loan extended by the committee and moneys received that do not meet the definition of contribution. This subtype is also used to report the receipt of money related to an over-reimbursement of personal expenditures.



If using this subtype to report the receipt of money because a person was over-reimbursed for personal expenditures, the transaction must be associated to the cash expenditure transaction that reimbursed the person.

#### ***Date of Miscellaneous Other Receipt***

The date the miscellaneous other receipt is received in the committee's physical custody.

#### ***Contributor/Payee***

This field discloses the institution/person providing the miscellaneous other receipt. The information that populates this field is based on the Address Book entry for the transaction.



See "ORESTAR Address Book" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### ***Amount***

Use the transaction amount.

#### ***Description and/or Purpose***

See [Transaction Description, Purpose, and Notes](#) section on page 53 for additional information.

#### ***Notes***

This field is not required for Miscellaneous Other Receipt transactions. See page 53 for more information.

#### ***Transaction Association***

If this transaction applies to a previously reported Miscellaneous Account Receivable, the two transactions should be associated. Otherwise, an association is not required.

See [Transaction Association](#) page 55 and the [ORESTAR User's Manual: Transaction Filing](#) for information on how to complete a transaction association when using transaction subtype Miscellaneous Account Receivable.

Associate: the receipt does not fully satisfy the receivable

Complete: the receipt fully satisfies the receivable. This is the last payment.

## **Refunds and Rebates**

This subtype includes a refund of a deposit, a rebate from a vendor, or a return of overpayment from a vendor. Refunds and rebates to committees must be offered in the ordinary course of business and on the same terms and conditions as those offered to nonpolitical entities.

#### ***Date of Refunds and Rebates***

The date the refund or rebate is received in the committee's physical custody.

#### ***Contributor/Payee***

This field discloses the institution/person providing the miscellaneous other receipt. The information that populates this field is based on the Address Book entry for the transaction.



See "ORESTAR Address Book" on pages 73 - 74 of this manual and the [ORESTAR User's Manual: Transaction Filing](#) for the instructions for completing an Address Book entry.

#### ***Amount***

Use the transaction amount.

#### ***Description and/or Purpose***

These fields are not required for Refunds and Rebates transactions.

### Notes

This field is not required for Refunds and Rebates transactions. See page 53 for more information.

## Transaction Description, Purpose, and Notes

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The transaction description, purpose and notes fields work together to provide context for a transaction. Some transactions require a purpose/description. All transactions allow them. The Notes field is only visible to the committee and the Elections Division. Except for the purpose “Reimbursement for Personal Expenditures” the committee may use either the Purpose or Description field (or both) to provide sufficient context for a transaction.

### Description

This field is used to enter a detailed description of a transaction’s purpose. It may be completed in lieu of selecting one of the pre-defined ORESTAR purposes with the exception of using Reimbursement for Personal Expenditures when writing a check to reimburse a person for previously reported personal expenditures.

It must be completed if any of the following pre-defined transaction purposes are used: General Operational Expenses, Public Office Holder Expenses, or Travel Expenses.

It also must be completed when reporting a transaction with subtype Miscellaneous Other Disbursement, Cash Balance Adjustment or Personal Expenditure Adjustment.

### Notes

This field is used to record additional information about a transaction. Do not use this field for information that is required to be in the Description field. It is also used to document why an in-kind contribution (from another committee) amount is amended after the due date for the transaction.

### Transaction Purpose(s)

Each Expenditure transaction type and In-Kind Contribution transaction subtype must have a Transaction Purpose, unless a purpose is provided in the Description field. Multiple transaction purposes may be used except when reimbursing a person for personal expenditures. The following transaction purposes are available:

#### Broadcast Advertising

Use for expenditures for radio or television advertising.

#### Cash Contribution

Use for a contribution given to another committee or organization.

#### Fundraising Event Expenses

Use for expenditures associated with holding a fundraiser, including payments to restaurants, hotels, caterers, other food and refreshment vendors, entertainers, and speakers.

#### General Operational Expenses

Use for general campaign operating expenses, including filing fees, bank service charges, purchase or rental of office equipment and furniture for the campaign, and office supplies. When this purpose is used, additional information is required to be entered in the Description field (e.g., office supplies, furniture).

## **Interest Payment**

Use for interest paid to a financial institution or other lender for a loan made to the committee.

## **Literature, Brochures, Printing**

Use for expenditures for the preparation and production of campaign literature and printed solicitations, including expenditures for mailing lists, design, photography, copy, layout, printing, and reproduction.

## **Loan Extended**

Use for an expenditure made by a committee that is a loan to another committee or organization. The committee must create and file a Miscellaneous Account Receivable transaction for the outstanding loan amount.

## **Management Services**

Use for fees and commissions paid to campaign management companies, agents, and campaign consultants.

## **Newspaper and Other Periodical Advertising**

Use for expenditures for advertising in newspapers, periodicals, and other publication

## **Online and Social Media Advertising**

Use for expenditures related to the production and purchase of websites, online content, social media, phone apps, etc. and all related advertising.

## **Other Advertising**

Use for expenditures related to the production and purchase of advertising, billboards, yard signs, voters' pamphlet statements and arguments, and campaign paraphernalia such as buttons, bumper stickers, t-shirts, etc.

## **Petition Circulators**

Use for payments made to individuals for collection of signatures on a petition or to a company that pays petition circulators.

## **Postage**

Use for expenditures for stamps, postage, and direct mail services.

## **Preparation and Production of Advertising**

Use for payments related to the preparation or production of broadcast, newspaper or other periodical advertising.

## **Public Office Holder Expenses**

Use for expenditures related to public office holder expenses such as gifts of nominal value, conference registration fees, membership dues, constituent communications, staff wages, office rent, mileage, gas, and travel. Additional information is required to be entered in the Description field (e.g., conference registration fee, staff wages, office rent, etc.).

## Reimbursement for Personal Expenditures

Use for payments made to a person for reimbursement of a personal expenditure made on behalf of the committee. The personal expenditure made by the person must be reported as a separate transaction.



See [Personal Expenditures](#) on pages 58 - 61 for information on how to report personal expenditures and reimbursement from committee funds.



When using the Reimbursement for Personal Expenditure purpose, the entire amount of the transaction is subtracted from the committee's Outstanding Personal Expenditure balance on the Account Summary. If a check represents more than just a reimbursement for personal expenditures, you must enter and file two separate transactions.

## Surveys and Polls

Use for expenditures related to surveys and polls, reports on election trends, voter surveys, telemarketing, and telephone banks, etc.



See [OAR 165-012-0050](#) for calculating the value of the poll results if the results are shared with any Oregon political or petition committee.

## Travel Expenses

Use for expenditures related to travel. Additional information is required to be entered in the Description field (e.g., lodging, airfare, meals, gas, mileage, etc.).

## Utilities

Use for expenditures for utilities (e.g., telephone, internet access, electricity, etc.)

## Wages, Salaries, Benefits

Use for expenditures related to campaign staff payroll, including wages, employment taxes, insurance, and payments to temporary employment agencies, etc.

## Transaction Association

An associated transaction is a transaction that is connected to, or dependent upon, another transaction that has previously been entered in ORESTAR. For example, a cash expenditure that is a partial or full payment of a previously entered account payable transaction must be associated to reduce the outstanding account payable balance on the committee's Account Summary.

# Prohibited Use of a Committee's Campaign Funds

## Prohibited Personal Use

All committees are prohibited from using campaign funds (any amounts received as contributions) for any person's personal use. "Personal use" means any use of a committee's funds to fulfill a personal commitment, obligation, or expense that would exist irrespective of the committee's business, the campaign or duties as a public office holder. This prohibition applies to all three types of committees (candidate, political action committee, and petition committee). Contact the Elections Division if you need guidance on what constitutes "prohibited personal use."

- ex** Examples of prohibited personal use include, but are not limited to:
- the purchase of household food items or supplies;
  - clothing other than items of de minimis value used in the campaign
  - mortgage, rent, or utility payments for real or personal property that is owned by any individual and used for campaign purposes, to the extent the payments exceed the fair market value of the property usage;
  - expenses made in connection a public office holder's unexcused absence from performing their duties;
  - admission to a sporting event, concert, theater, or other form of entertainment, unless part of a specific campaign or office holder activity;
  - dues, fees, or gratuities at a country club, health club, recreational facility, or vacation property, unless they are part of the costs of a specific fundraising event that takes place on the club's or facility's premises;
  - dues to professional or civic organizations in which the membership is not integrally related to the candidate's election or duties as a public office holder or an individual's duties related to a political committee or petition committee;
  - loans made to any individual for the individual's personal use;
  - salary to a person, unless the person is providing bona fide services to the committee or the public office holder;
  - any judgement awarded under ORS 18.005, or any civil penalty imposed by an agency as defined in ORS 183.310, or imposed by a local government as defined in ORS 174.116; or

## Exceptions to the Personal Use Prohibition

Campaign funds may be used for expenses incurred as a public office holder if directly related to an office holder's official duties, or for expenses incurred by a candidate committee, political action committee or petition committee if the expenses are related to the business of the committee. Examples include:

- mileage for use of a personal vehicle (not exceeding current federal rate);
  - service and fuel for a leased or purchased vehicle;
- i** When reporting expenditures relating to vehicle usage, a claim may be made for either payment of mileage or expenses related to use of the vehicle (e.g., gas, maintenance), but not both.
- the purchase or lease of office equipment or supplies;
  - room rental for public meetings;
  - lodging and food;

- convention or conference fees;
- telephone expenses;
- salary or expenses associated with employees performing official business;
- a campaign party or thank you party for volunteers and supporters;
- occasional childcare expenses incurred by the candidate or public office holder that are a direct result of performing their duties; reasonable recognition for campaign volunteers and employees in proportion to the amount of bona fide services provided during the campaign, unless made to a member of the candidate's family; **or**
- gifts of nominal value and donations of a nominal amount made on a significant event such as a holiday, graduation, marriage, retirement, or death, unless made to a member of the candidate's family.

**i** If a governmental body or any other person later reimburses a campaign for a specific expenditure made from campaign funds, or for personal expenditures made by a person, the reimbursement must be deposited into the campaign account and reported as a miscellaneous other receipt.

**!** The committee must be reimbursed for any committee assets (e.g., computer, furniture, etc.) converted to personal use.

## Expenditures for Professional Services Rendered by Candidate

A candidate or principal campaign committee of a candidate may not use campaign funds to make an expenditure to pay the candidate a salary or otherwise compensate themselves for lost income or for professional services rendered to their committee. Contact the Elections Division if you need guidance on what constitutes "professional services."

## Common Campaign Activities

### Receiving Contributions Online

A committee may use a web-based company to receive contributions. Each contribution must be deposited in the committee's account within seven business days of its collection. The committee reports the entire amount contributed even if the company retains a percentage of the contribution for processing fees. Any amount retained for processing fees is a reportable expenditure. The sum total of the processing fees retained on a single day may be entered and filed as one expenditure.

**ex** The committee receives a \$200 contribution and a \$100 contribution electronically via PayPal on January 5, 2024. PayPal retains \$5 for processing the \$200 contribution and \$2.50 for processing the \$100 contribution. Even though only \$292.50 is deposited into the campaign account, the committee reports the full amount of each contribution (each as a separate transaction) and reports a \$7.50 expenditure transaction (the total processing fee retained on January 5) reporting PayPal as the payee.

## Legal Expenses

In general, any committee may use amounts received as contributions to pay legal expenses incurred when seeking legal advice when:

- no legal proceeding or investigation related to the duties of the respective treasurer, director, chief petitioner, candidate, or public official has been initiated;
- and**
- the legal expenses do not constitute [Prohibited Personal Use](#) defined on page 56.



“Amounts received as contributions” under ORS 260.407 include all types of contributions. An in-kind contribution of legal expenses to a candidate, political committee, or petition committee constitutes payment of such legal expenses incurred by the respective treasurer, director, chief petitioner, candidate, or public official for purposes of ORS 260.407.

If a legal proceeding or investigation has been initiated, the committee may not use amounts received as contributions to pay legal expenses unless:

- the legal proceeding was brought under ORS chapters 246 to 260 or a campaign finance provision of a county charter or ordinance, a campaign finance provision of a city charter or ordinance, or any charter or ordinance provision adopted under the authority of ORS 260.163, excluding legal proceedings brought under ORS 260.407 or ORS 260.409 or an equivalent provision of a county or city charter or ordinance;
- or**
- the legal proceeding or investigation does not arise from the course and scope of the duties of:
  - the candidate or public official, for Candidate Committees;
  - the treasurer or director, for Political Action Committees;
  - the chief petitioner(s) or treasurer, for Petition Committees.



If either of the criteria immediately above apply, legal expenses related to such legal proceeding or investigations must not constitute Prohibited Personal Use defined on page 56.



Under certain circumstances, Legal and Accounting Services may be non-reportable activities. See page 68 for additional information

## Personal Expenditures

A personal expenditure occurs when a person spends money on behalf of a committee and expects to be reimbursed by the committee. This includes charges on a personal credit or debit card. Two transactions must be filed to disclose personal expenditures and the subsequent reimbursement.

The first transaction discloses who made the personal expenditure, as well as when and where the money was spent. The transaction type is Expenditure and the transaction subtype is Personal Expenditure for Reimbursement. The Payer of Personal Expenditure is the person that used their money to make the expenditure and the Contributor/Payee is the name of the entity where the person spent the money.

The second transaction discloses the reimbursement to the person from committee funds. The transaction type is Expenditure and the transaction subtype is Cash Expenditure. The transaction purpose of this transaction must always be Reimbursement for Personal Expenditures which is available in the ORESTAR Transaction Purpose dropdown list. The payee for this transaction is the name of the person, even if the check is written directly to a credit card company.



There is a different reporting requirement when a political committee makes personal expenditures on behalf of another political committee or is sharing expenses with other committees; see pages 60- 61 for an example of the reporting requirements.



“Person” includes an individual, corporation, limited liability company, labor organization, association, firm, partnership, joint stock company, club, organization, or other combination of individuals having collective capacity. This includes political committees and petition committees.

## How to Report Personal Expenditures Made by a Person That is Not a Political Committee

**ex** Jane Smith goes to Costco on March 1, 2024, and writes a personal check for \$212.00 to purchase items for the committee's fundraiser. The committee writes check #200 from the campaign account to pay Jane back on March 10, 2024. There are two transactions to report:

**Jane's personal expenditure is reported as follows:**

Transaction Date: **3/1/2024**

Transaction Type: **Expenditure**

Transaction Subtype: **Personal Expenditure for Reimbursement**

Payer of Personal Expenditure: **Jane Smith**

Contributor/Payee: **Costco**

Amount: **\$212.00**

Transaction Purpose(s): **Fundraising Event Expenses**

**The committee's expenditure to reimburse Jane is reported as follows:**

Transaction Date: **3/10/2024**

Transaction Type: **Expenditure**

Transaction Subtype: **Cash Expenditure**

Contributor/Payee: **Jane Smith**

Payment Method: **Check**

Check Number: **200**

Amount: **\$212.00**

Transaction Purpose: **Reimbursement for Personal Expenditure**

**i** If a person is not reimbursed for reported personal expenditures and decides to "forgive" the amount owed, the committee must report a transaction disclosing the "forgiveness." The transaction type is Contribution, the transaction subtype is In-Kind/ Forgiven Personal Expenditures, and the Contributor is the name of the person forgiving the money owed.

It is important to review the committee's Outstanding Personal Expenditure Balance on the ORESTAR Account Summary to ensure that the total is correct. Generally, if there is a "negative" outstanding amount that means that the committee has reported reimbursements exceeding the amount of reported personal expenditures.

## How to Report Personal Expenditures Made by a Political Committee

**ex** ABC PAC uses committee funds to pay the wages (\$500) of Sally Smith on March 10, 2024, who is an employee working for Committee to Elect Jane Doe. ABC PAC expects reimbursement from the candidate committee. Committee to Elect Jane Doe reimburses ABC PAC on March 15, 2024; ABC PAC receives the reimbursement check on March 20, 2024. In this example there are four transactions that must be disclosed.

**ABC PAC's payment to Sally Smith on behalf of Committee to Elect Jane Doe:**

Transaction Date: **3/10/2024**

Transaction Type: **Other Disbursement**

Transaction Subtype: **Miscellaneous Other Disbursement**

Contributor/Payee: **Sally Smith**

Payment Method: **Check**

Check Number: **200**

Amount: **\$500.00**

Transaction Purpose(s): **Wages, Salaries, Benefits**

**Committee to Elect Jane Doe reports the personal expenditure made by ABC PAC:**

Transaction Date: **3/10/2024**

Transaction Type: **Expenditure**

Transaction Subtype: **Personal Expenditure for Reimbursement**

Payer of Personal Expenditure: **ABC PAC**

Contributor/Payee: **Sally Smith**

Amount: **\$500.00**

Transaction Purpose(s): **Wages, Salaries, Benefits**

**Committee to Elect Jane Doe reports the expenditure to reimburse ABC PAC:**

Transaction Date: **3/15/2024**

Transaction Type: **Expenditure**

Transaction Subtype: **Cash Expenditure**

Contributor/Payee: **ABC PAC**

Payment Method: **Check**

Check Number: **1001**

Amount: **\$500.00**

Transaction Purpose: **Reimbursement for Personal Expenditure**

**ABC PAC receives the reimbursement from Committee to Elect Jane Doe:**Transaction Date: **3/20/2024**Transaction Type: **Other Receipt**Transaction Subtype: **Miscellaneous Other Receipt**Contributor/Payee: **Committee to Elect Jane Doe**Amount: **\$500.00**Description: **Reimbursement for personal expenditure**

In some instances, a committee may make expenditure to its affiliated organization without it being considered a personal expenditure. For example, if the affiliated organization of a committee has supplies on hand (not specifically purchased for a campaign) the committee may purchase the supplies from the affiliated organization without reporting a personal expenditure. This may also apply to occasional staff time the affiliated organization may provide to the committee and merchant fees associated with credit card processing. However, these must still be reported as cash expenditures.

## Candidates Running as a Slate

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Each candidate running for public office must establish their own Candidate Committee if they do not meet the [Exception to Creating a Candidate Committee](#) on page 5. A candidate may designate only one political committee as the candidate's principal campaign committee. A political committee may not be designated as the principal campaign committee of more than one candidate. A group of candidates running together as a slate or as a ticket may not establish a Political Action Committee to support their slate or ticket in lieu of establishing separate Candidate Committees.


Though running as a slate or ticket is not prohibited by Oregon election law, candidates should be aware of the complexities this type of campaign can create for campaign finance reporting purposes. To ensure transparency, the Elections Division recommends the following to candidates running as a slate or ticket:

- Solicit contributions to each candidate instead of as a slate or ticket.
- When soliciting contributions on behalf of other candidates be aware of the laws and rules for correct reporting. See page 28 "[Contributions Received by an Entity Other Than the Committee](#)"
- Each candidate should pay vendors directly for their portion of costs and if required, report Account Payable transactions for orders placed.

## Mileage

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Expenditures made to pay a person for mileage are reported as transaction type Expenditure, subtype Cash Expenditure and transaction purpose Travel Expenses. The transaction is required to include "Mileage" in the Description field. **Mileage is not reported as a personal expenditure for reimbursement.**

 When using campaign funds to pay an individual for use of the individual's vehicle, the individual may be paid for either mileage or expenses related to use of the vehicle (e.g., gas, maintenance), but not both.

There are some exceptions for reporting travel expenses incurred by someone other than the committee; see [Unreimbursed Travel Expenses](#) on page 68 for more information.

## Reporting Credit/Debit Card Transactions

---

If a committee uses a credit or debit card issued to the committee for any expenditure, the committee must report the charge as transaction type Expenditure and subtype Cash Expenditure. The payee is the entity paid with the credit/debit card, not the credit card company. The date of the transaction is the date the credit/debit card was used, not the date of the credit card or debit card statement or the date payment is made to the credit card company.

**i** The committee does not report any payments made directly to the credit card company except for payment for interest, credit card fees or late payment penalties.

## Fair Booths

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If a committee rents a fair booth to distribute political material and the material is provided by another committee or campaign, there is no reportable in-kind contribution for the distribution of the material or the fair booth rental. However, if campaign material is produced by someone other than the committee or campaign providing the material there may be a reportable in-kind contribution.

## Fundraising Activities

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If a contributor buys a ticket to attend a fundraising event and receives goods or services such as a dinner or a round of golf, only the amount in excess of the fair market value of the goods or services is reported as a contribution. The committee must determine the fair market value of the goods or services received by the contributor and report that amount as transaction type Other Receipt and subtype Items Sold at Fair Market Value.

**i** Moneys received on a single day which qualify as Items Sold at Fair Market Value receipts may be totaled and reported as one transaction.

The amount in excess of the fair market value is considered a contribution and is reported as subtype Cash Contribution. The committee shall inform the contributor of the amount considered a cash contribution for Oregon income tax credit purposes.

All expenses associated with the fundraising event are also required to be reported as cash expenditures, in-kind contributions or personal expenditures for reimbursement, whichever is applicable.

## Fundraising Dinners

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A committee may organize a fundraising dinner with an established cost per person.

Money received to attend the dinner (up to the fair market value) is reported as transaction type Other Receipt, subtype Items Sold at Fair Market Value. Any amount paid that exceeds the fair market value of the dinner is reported as a Cash Contribution.

If the cost of the dinner is paid by the committee, the expenditures are reported as transaction subtype Cash Expenditure. If the dinner is donated to the committee at no cost, the cost of the dinner is reported as transaction subtype In-Kind Contribution. If the dinner is paid for by a person making personal expenditures that wants reimbursement, those transactions are reported as transaction subtype Personal Expenditure for Reimbursement.

**ex** If a contributor pays \$50 to attend a fundraising dinner and the value of the dinner is \$20, only \$30 of the payment for the dinner is reported as a contribution. The \$20 for the dinner is reported as transaction type Other Receipt because it is not considered a contribution.

## Fundraiser When Tickets are Sold through a Third Party

A committee may sell tickets to a fundraising event utilizing a business vendor. If the cost of the ticket is more than the fair market value of the event, the committee must ensure that contributor information is collected. If the aggregate amount of contributions from the contributor exceeds \$100 for the calendar year, the contributor information (name, address, and occupational information for an individual) must be disclosed. Any fee or commission retained by the vendor is reported as transaction subtype Expenditure.

**ex** A committee holds a concert as a fundraising event. The ticket cost is \$250; the fair market value is \$100. The vendor retains a 5% handling fee (\$12.50).

**There are three transactions to report:**

→ Transaction Type: **Contribution**

Transaction Subtype: **Cash Contribution**

Amount: **\$150.00**

→ Transaction Type: **Other Receipt**

Transaction Subtype: **Items Sold at Fair Market Value**

Amount: **\$100.00**

→ Transaction Type: **Expenditure**

Transaction Subtype: **Cash Expenditure**

Amount: **\$12.50**

**i** Moneys received on a single day which qualifies as Items Sold at Fair Market Value receipts may be totaled and reported as one transaction.

Expenditures made on a single day for the handling fee may be totaled and reported as one transaction.

## Raffles

The Department of Justice regulates licensing for raffles. For licensing requirements and procedures, contact the Department of Justice, Charitable Activities Section.

**Q** See [Information Sources](#) on pages [96-97](#) for contact information for the Charitable Activities Section.

Money collected from the sale of raffle tickets is reported as transaction type Other Receipt and subtype Items Sold at Fair Market Value, assuming that each raffle ticket is sold for the fair market value of the prize or less. Any amount paid for a raffle ticket that exceeds the prize's fair market value is reported as transaction type Contribution, subtype Cash Contribution.

If the raffle prize is donated to the campaign, the prize is reported as an In-Kind Contribution. If the prize is purchased with committee funds, the purchase of the prize is reported as transaction type Expenditure, subtype Cash Expenditure.

## Auctions

A committee may conduct an auction as a fundraising activity. Items or services donated for the auction are reported as in-kind contributions. The amount of the in-kind is based on the fair market value of the goods or services. The amount of the winning bid, up to the fair market value, is reported as transaction type Other Receipt and subtype Items Sold at Fair Market Value. The amount paid in excess of the fair market value of the auction item is reported as a Cash Contribution.

**ex** On February 2, 2024, Jane Smith donates three nights at her beach house to the committee's silent auction. The fair market value is \$450.00.

**The In-Kind Contribution transaction is reported as follows:**

Transaction Date: **2/2/2024**

Transaction Type: **Contribution**

Transaction Subtype: **In-Kind Contribution**

Contributor/Payee: **Jane Smith** (address and occupational information is required because the aggregate contributions from Jane have exceeded \$100 in 2024)

Amount: **\$450.00**

Transaction Purpose(s): **Fundraising Event Expenses**

Tom Johnson's winning bid of \$750 is reported by creating two transactions: the Cash Contribution transaction in the amount of \$300 and the Items Sold at Fair Market Value transaction in the amount of \$450.

**The Cash Contribution transaction is reported as follows:**

Transaction Date: **The date the committee receives the money from Tom, typically the date of the auction**

Transaction Type: **Contribution**

Transaction Subtype: **Cash Contribution**

Contributor/Payee: **Tom Johnson** (address and occupational information is required because the aggregate contributions from Tom have exceeded \$100 in 2024)

Amount: **\$300.00**

**The Items Sold at Fair Market Value transaction is reported as follows:**

Transaction Date: **The date the committee receives the money from Tom, typically the date of the auction**

Transaction Type: **Other Receipt**

Transaction Subtype: **Items Sold at Fair Market Value**

Contributor/Payee: **This is not a required field when reporting Items Sold at Fair Market Value**

Amount: **\$450.00**

## Fundraising Cautions

### Giving Something of Value

With some exceptions, Oregon election law prohibits giving away a thing of value with the intent to influence how a person votes or to influence how they engage in certain other political activities. Campaign buttons, bumper stickers, posters, brochures, doorknob hangers and campaign literature have no use or value independent of a political campaign and may be given away at no charge.

There are three elements that must be present for giving away a thing of value to constitute undue influence:

- The item must be an item of value (see lists below);
- The item must be advertised or otherwise promoted as available as an inducement; and
- The inducement must be to get a person to take an action restricted by statute. See ORS 260.665 for a full list of actions this applies to.

Therefore, political groups may sometimes give away a thing of value. To avoid undue influence, committees should not advertise or promote giveaways. Another way to avoid undue influence is to make the item available to everyone regardless of their support or opposition of the political issue.

**ex** Committees may give away t-shirts if the give-away is not advertised in any way, or if individuals are eligible to receive a t-shirt regardless of whether they choose to register to vote at the table.

**ex** At a fundraising dinner where each guest is charged \$50 to enter, the campaign may include on the invitation a notice that all attendees will receive a t-shirt included in the purchase price.

**ex** It is allowable to provide door prizes at a fundraiser as long as the door prizes are not advertised as an inducement to attend the fundraiser.

Items of nominal value include **very inexpensive** (i.e. fair market value of approximately \$1.00 or less) types of:

balloons	flags (novelty with campaign information)	small candy
bookmarks	ink pens	refrigerator magnets or “mini-magnets”
calendars	key chains	return envelope*
eye-glass repair kits (of low value)	litterbags (paper or plastic)	rulers (small – wood or plastic)
emery boards	matchbooks	shopping bags (paper or plastic)
fans (paper or plastic)	pencils	bottled water

\*Loose postage stamps **may not** be given away for free in a campaign context. Also, envelopes that are stamped but are blank as to a return mailing address **may not** be given away for free. This is because this would make the envelope something of value, as it could be used for other purposes by the recipient, whereas a pre-stamped and addressed envelope would merely facilitate the return of the envelope to the campaign with no independent value.

The distribution of these types of items is not “undue influence,” inducing the recipient to take a certain political action in violation of election law, if the committee ensures:

- only very small quantities of an item are given to any one person;
- the distribution of the item is incidental to the political activity that occurs during the distribution ; and
- the item does not also contain another connected offering for something of value (for example, the back of a fan should not contain a coupon for \$3.00 off a pizza).

Items that **should not** be used as an inducement (advertised as available for free in connection with a political issue covered by ORS 260.665):

- calculators;
- flashlights;
- frisbees;
- hats;
- postage stamps;
- toys;
- t-shirts; or
- anything with a fair market value of approximately \$1.00 or more.

If a committee advertises and gives away items of value, then the campaign must charge at least the cost of the item. The money spent to purchase the items and the money received in payment for the items must be reported in compliance with campaign finance regulations.

## Providing Food and Refreshments at a Political Gathering

A common political practice is to have a "meet the candidate" neighborhood event at which incidental refreshments such as coffee, tea and cookies may be served at no charge. Refreshments may be provided at a political gathering for no charge if they are incidental to the event. Food or refreshments, at no charge, **cannot be the featured attraction** to induce people to attend a political event (e.g., an advertisement that announces “Join John Doe at a free spaghetti feed”).

If more food is served than what would be conservatively defined as incidental to the event, there must be a charge for at least the actual cost of the food or refreshments if the food and refreshments are advertised.

The host may either: 1) charge for the cost of the food only (example A), or 2) charge a per plate/per person cost in excess of the value of the food (example B). In the latter case, the amount collected in excess is considered a campaign contribution.

**ex** **Example A:** “Join John Doe for spaghetti dinner, cost \$3.50 per person.” (\$3.50 is the actual cost of the dinner.)

**ex** **Example B:** “Join John Doe for spaghetti dinner, cost \$25 per person,” (\$3.50 is the actual cost of the dinner). Report each person as contributing the difference of \$21.50.

Another related, frequently asked question is whether it is allowable to hold a “thank you/appreciation” event **after** the election to honor political campaign volunteers, at which food and beverages will be provided and small prizes may be awarded. This type of “thank you/appreciation event” is allowable and would not be considered a violation of the “undue influence” law **if** the event is not used as an inducement for new volunteers **before** the election to get the attendees to provide services or otherwise contribute to the campaign. Therefore, the event **must not** be advertised or announced in any way **before** the election.

Additionally, at the event the attendees **must not** be induced by the food, prizes, etc. to provide any further services or make contributions to the campaign. In these specific, limited circumstances, the food served may go beyond the “refreshment” category into pizza and such and the prizes may be of a bit more value than the above listed nominal value items.

If the party is held prior to the election, caution must be taken to **not** include information about the refreshments and possible prizes to induce a person to volunteer for the campaign. Contact the Elections Division if you have questions about what may or may not be given away at a campaign event.

## Non-Reportable Activities

There are some activities that are exempt from the definitions of contribution and expenditure and are not required to be reported.

### Publications and Television or Radio Commentaries

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News stories, letters to the editor, commentaries, and editorials distributed through the facilities of a broadcasting station, newspaper, magazine, or other periodical publication are not considered contributions unless the facility is owned by a political committee. A publication must be published at regular intervals with consistent circulation.

However, if a special publication is produced by a committee and the purpose is to support or oppose a candidate, measure, political party, political action committee, or petition committee, any expenses associated with the publication must be reported. This includes payment to an entity for the publication that is then inserted into another publication for dissemination to the public, either for purchase or given away free of charge.

If a person, other than a political committee, makes political expenditures that are “independent”, those expenses may need to be reported. See pages [12- 13 Independent Expenditure Filers’](#) reporting requirements.

### Volunteer Activities

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Generally, volunteer activities are non-reportable. An individual may volunteer personal services to a committee without making an in-kind contribution as long as the individual is not paid by anyone for performing the services.

### Corporate, Labor and Membership Organization Communications

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Corporations, labor organizations, and membership organizations may communicate only with members, shareholders, or employees without such activity being considered a contribution, as long as the labor or membership organization or corporation is not organized primarily for the purpose of influencing an election. A political committee is not considered a membership organization. Communication must be reported if the method of communication does not guarantee that named members, shareholders, or employees will be the only recipients of the communication. For example, communications, such as billboards, cable TV ads, targeted digital ads, robocalls to household numbers, or a double-sided postcard must still be reported.

### Receptions

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An individual may volunteer to hold a reception or provide coffee for a political committee. Costs incurred by the individual who is using his or her residence, including a community room associated with the residence, for invitations, food, and beverages provided at the reception are not reportable expenses.

If more food is being served than what would be defined as incidental, there must be a charge equivalent to at least the actual cost of the food or refreshments. Free food or refreshments cannot be the featured attraction to induce people to attend the reception.

## Legal and Accounting Services


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Legal and accounting services provided free to a political committee are not reportable if:

→ the services are provided solely for the purpose of helping the campaign comply with ORS Chapter 260 (Campaign Finance Regulations, Election Offenses);

**and**

→ the person paying the individual performing the service is the regular employer of the individual performing the service.

 Legal representation in a lawsuit, in court, or in an administrative proceeding must be reported as it is not for the purpose of ensuring compliance.

## Unreimbursed Travel Expenses

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Unreimbursed travel expenses incurred by an individual, including a candidate, made on behalf of a political committee are not reportable. An individual working on a political committee's campaign (including a candidate, a paid staff member, or a volunteer) may voluntarily use the individual's own funds to pay for transportation expenses without making a contribution. This exception does not apply to lodging.

## Vendor Discounts on Food and Beverages

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A vendor of food or beverages may sell food or beverages to a committee at a discounted rate. The discount is not a reportable in-kind contribution as long as the amount charged is at least equal to the vendor's cost for the food or beverage.

## Use of Internet Services

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Generally, electronic transmissions have no intrinsic monetary value. Sending email messages or adding links on an existing webpage are not considered in-kind contributions or independent expenditures by a person performing the email distributions or working on the websites. Further, if an existing email list is ordinarily given away for free, then there is no in-kind contribution made by the entity giving away the list. But if there is normally a fee charged to obtain the list, there is a reportable in-kind contribution.


Therefore, if the effort to produce a website, or to transmit an email, even to a large list of recipients, is provided by an unpaid volunteer, and no money is spent to add hardware, software, hosting fees, domain registration or internet access, or to acquire an email list, there is no reportable contribution.

If, however, a person or committee makes expenditures to provide the service (e.g., produce a website or distribute an email), including wages or other payment to an individual or firm, those costs are reportable in-kind contributions or personal expenditures. If a person or committee makes expenditures to produce a website, boost a post on a social media platform, or transmit an email, those are reportable expenditures.

## Transfer of Funds to Earn Interest

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Transfers of funds between checking and savings accounts or for investment purposes are non-reportable because the funds remain part of the committee's assets.

 See [Other Disbursements](#) page 45 and [Other Receipts](#) page 48 for information on how to report a loss or gain on an investment.

## Return or Refund of Contributions

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Contributions received by the committee and returned to the contributor within seven calendar days of receipt without being deposited in the campaign account are non-reportable.

A contribution received by a committee subject to reporting contributions received during a legislative session that is returned within two business days of receipt without being deposited in the campaign account also is non-reportable.

## Change for a Fundraiser

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The withdrawal of money and the deposit of the money back to the committee's account for the purpose of making change at a fundraiser are non-reportable.

## Debates

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A candidate debate or forum for a state office, or a communication publicizing a candidate debate or forum for a state office, is not a reportable in-kind contribution if candidates for the state office have been invited to participate in the candidate debate or forum based on neutral criteria that are publicized in advance of the invitation.

Any expenditures made by a broadcasting station, newspaper, magazine, or other periodical publication to facilitate a debate or forum are not considered a contribution.

# ORESTAR Account Summary

When a user accesses the campaign finance section of the committee's Private Workshop, the first page that displays is the committee's Account Summary for the current year. The Account Summary represents the total activity reported and filed by a committee in a calendar year. The figures on the Summary update with every transaction filing. The Account Summary should be reviewed when a user logs into their Private Workshop to affirm the line item totals are accurate. A description of certain line items and what the totals represent is found below.

## Contributions

### Cash Contributions:

The total amount of cash contribution transactions filed in a calendar year.

### Loans Received (non-exempt):

The total amount of loans received (non-exempt) transactions filed in a calendar year.

### In-Kind:

The total amount of in-kind contributions filed in a calendar year.

## Expenditures

### Cash Expenditures:

The total amount of cash expenditure transactions filed in a calendar year.

### Loan Payments (non-exempt):

The total amount of loan payment (non-exempt) transactions filed in a calendar year.

### In-Kind:

This field does not indicate in-kind expenditure totals. Rather, it mirrors the amount listed as an in-kind contribution to allow the Ending Cash Balance to calculate correctly.

## Cash Balance

### Other Receipts:

The total amount of other receipt transactions filed in a calendar year.

### Loans Received (exempt):

The total amount of loans received (exempt) transactions filed in a calendar year.

### Other Disbursements:

The total of other disbursement transactions filed in a calendar year.

### Loan Payments (exempt):


The total amount of loan payment (exempt) transactions filed in a calendar year.

### Balance Adjustments:

The total amount of cash balance adjustment and personal expenditure balance adjustment transactions filed in a calendar year.

## Ending Cash Balance:

The ending cash balance amount should match the committee's campaign bank account balance if all of the transactions have been filed in ORESTAR and all contributions have been deposited and reported expenditures have cleared the financial institution.

 This amount, in most cases, should not be a negative amount. A negative amount is an indication that transactions have not been filed by the committee or that the committee's bank account balance is overdrawn.

## Financial Status

### Accounts Receivable:


The total amount of outstanding miscellaneous account receivable transactions filed. This amount includes proceeds that have not been but are expected to be collected by the committee. The balance will carry forward to the next calendar year until the committee files transactions to resolve the balance.

### Total Outstanding Loans:

The total amount of outstanding loans (exempt and non-exempt) filed. The balance will carry forward to the next calendar year until the committee files transactions to resolve the outstanding balance.

### Outstanding Personal Expenditures:

The total amount of outstanding personal expenditures. The amount is based on the total reported personal expenditures for reimbursement and the total reported cash expenditures made from committee funds to reimburse the person that made the personal expenditures. The balance will carry forward to the next calendar year until the committee files transactions to resolve the outstanding balance.

 This amount should not be a negative amount. A negative amount may possibly be an indication that personal expenditures for reimbursement have not been correctly reported. See [pages 38 - 41](#) for an example of how to report personal expenditures.

### Accounts Payable:

The total amount of accounts payable transactions. The balance will carry forward to the next calendar year until the committee files transactions to resolve the outstanding balance.

### Balance Deficit:

The amount is calculated by taking the cash balance amount, adding the account receivable amount, then subtracting the outstanding loans, outstanding personal expenditures and account payable amounts.

# ORESTAR Aggregates

## Calculating a Transaction's Calendar Year Aggregate

The calendar year aggregate is the total amount of contributions received from one contributor or the total amount of expenditures paid to the same payee during a calendar year (January 1 – December 31). When the calendar year aggregate for a contributor or payee exceeds \$100, the committee must disclose at least the name, address, and occupational information (if any) for contributors or, for payees, the name and city and state where the payee is located. The Elections Division encourages committees to collect occupational information for a contributor regardless of the amount of the contribution.

Committees that allow ORESTAR to track and calculate the calendar year aggregate totals for contributors and payees must enter every contribution and expenditure. ORESTAR determines whether the contribution or expenditure detail should be disclosed or included in the appropriate "miscellaneous \$100 and under" category. It automatically populates the calendar year aggregate for the contributor or payee on each transaction.

## Opting Out of the System Calculated Aggregate

A committee can opt out of the system-calculated aggregates, but if a committee chooses to opt out, the committee is required to enter a calendar year aggregate amount for each transaction if the calendar year aggregate for that contributor/payee exceeds \$100.

The calendar year aggregate for a contributor includes cash contributions, non-exempt loans received, co-signer obligations (except obligations of the candidate's spouse), and in-kind contributions. The calendar year aggregate does not include outstanding loans carried over from a prior calendar year. The amount of a non-exempt loan received or co-signer obligation is part of the contributor's calendar year aggregate until the loan is repaid in full.

The calendar year aggregate for a payee must include accounts payable, cash expenditures, non-exempt loan payments, and personal expenditures for reimbursement.

Detailed contributor or payee information is not disclosed until the aggregate contributions from a single contributor or aggregate expenditures to a single payee exceed \$100 in a calendar year. If a committee "opts out" of the system-calculated aggregate for a calendar year, it may not "opt in" until the next calendar year. If a committee chooses to opt back in to the system the following year, it must do so prior to entering any transactions in ORESTAR for the new calendar year.



See the [ORESTAR User's Manual: Transaction Filing](#) for information on opting out of the system-calculated aggregate.

A committee that "opts out" of the ORESTAR system-calculated aggregate or uses software other than ORESTAR to generate and upload transactions must ensure that the data accurately reports all contributor/payee information for:

- Any contribution over \$100. Also, for those contributors whose aggregate contributions have exceeded \$100 in the calendar year, the committee must disclose in detail (i.e., name, address, and occupational information) all contributions (including those of \$100 or less) from that date forward;
- Any expenditure over \$100. Also, for those payees whose aggregate expenditures have exceeded \$100 in the calendar year, the committee must disclose in detail (i.e., name, address) all expenditures (including those of \$100 or less) from that date forward;

**and**

- Any non-exempt loan received or non-exempt loan payment, regardless of the amount.

All contributions from contributors and expenditures made to payees whose aggregate has not exceeded \$100 for the calendar year must be combined and listed in the appropriate miscellaneous category, based on the transaction subtype and transaction date. Miscellaneous contribution and expenditure category totals must be calculated on a daily basis.

**ex** **Calculating Expenditure Aggregates**

On January 8, 2024, the committee makes a \$50 cash expenditure to the payee, making the payee's calendar year aggregate \$50.

The \$50 will be included in "miscellaneous cash expenditures \$100 and under" amount for January 8, 2024.

On February 23, 2024, the committee makes another \$100 cash expenditure to the same payee, making the payee's calendar year aggregate \$150. The second expenditure transaction will be disclosed in detail because the aggregate for the payee has exceeded \$100 in the calendar year and will display an aggregate of \$150.

The first transaction will remain in the "miscellaneous cash expenditures \$100 and under" category.

**ex** **Calculating Contribution Aggregates**

On January 8, 2024, an individual makes a \$75 in-kind contribution to a committee making the contributor's calendar year aggregate \$75.

The \$75 will be included in "miscellaneous in-kind contributions \$100 and under" amount for January 8, 2024.

On February 23, 2024, the individual makes a \$50 cash contribution to the same committee, making the contributor's calendar year aggregate \$125. The second contribution transaction will be disclosed in detail because the aggregate for the contributor has exceeded \$100 in the calendar year.

The first transaction will remain in the "miscellaneous in-kind contributions \$100 and under" category.

## ORESTAR Address Book

ORESTAR has an Address Book which stores information about each contributor and payee associated with a committee. The committee must create only one Address Book entry for each person. The entry includes the person's name and address. Do not list an address that is exempt from public disclosure. If the contributor's address is exempt from public disclosure; use another address where the contributor receives correspondence. Occupational information is also required if the entry is associated with an individual.

Political committees or petition committees registered with the Oregon Elections Division are automatically available to be added in each committee's Address Book. To add registered committees into the committee's Address Book, start typing any part of a committee's name in the Committee Name/ID field and a list will display with possible matches. After a selection has been made the address of the committee will automatically populate.

An Address Book record is required for each transaction subtype, with the exception of transaction subtypes Interest/Investment Income, Items Sold at Fair Market Value, Nonpartisan Activity, Cash Balance Adjustment, or Personal Expenditure Adjustment.

**i** A committee must create only one entry in the committee's ORESTAR Address Book even if a person is both a contributor and payee.

**?** See the [ORESTAR User's Manual: Transaction Filing](#) for instructions in creating, saving, editing, and deleting Address Book entries.

## Address Book Type

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For each Address Book entry, a type must be selected. The following address book types are available for selection:

### Business Entity

This includes for-profit and professional corporations, cooperatives, partnerships, limited liability companies, and sole proprietorships, etc.

### Candidate & Immediate Family

This includes the candidate, the candidate's spouse and any child, parent, grandparent, brother, half-brother, sister, or half-sister of the candidate, and the spouses of such persons, but does not include family members of the candidate's spouse.

### Individual

### Labor Organization

### Other

This includes clubs, associations, nonprofit corporations, tribal organizations, post office, governmental entities and trusts.

### Political Committee

This includes committees filed in the State of Oregon or any other jurisdiction, including candidate committees, petition committees, and political action committees (e.g., miscellaneous committee, measure committee, recall committee, and caucus committee).

### Political Party Committee

This includes a committee established by a major or minor political party in Oregon, including county central committees. This does not include a caucus committee.

### Unregistered Committee

This includes a committee that is not registered with the Oregon State Elections Division. This includes out-of-state committees and federal committees.

## Enforcement Procedures and Civil Penalties

The following are enforcement actions for transactions that are not submitted by the deadline or for certain campaign finance activities that do not comply with ORS Chapter 260.



Criminal penalties may apply if a transaction verified as true by the treasurer or candidate is knowingly submitted with false information. See ORS 260.715(1) for additional information.

## Inspection of Accounts and Retention of Records

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[ORS 260.055](#) and [260.200](#)

## Inspection of Accounts of Contributions and Expenditures

Accounts kept by a committee or independent expenditure filer may be inspected under reasonable circumstances at any time before the election to which the accounts refer or during the period of retention by any candidate or treasurer of any committee active in the same electoral contest. The right of inspection may be enforced by writ of mandamus issued by any court of competent jurisdiction. The Elections Division and other elections filing officers have no role in these requests made by candidates or treasurers.



Oregon election law requires all accounts of contributions and expenditures to be current not later than seven business days after the contribution is received or expenditure is made. Failure to do so may subject the committee to civil penalties.

## Retention of Records

Committees and independent expenditure filers must preserve and retain supporting documentation for each transaction required to be filed or for transactions occurring when a committee has filed a Certificate of Limited Contributions and Expenditures. Documentation must be kept for at least two years after the date the transaction is filed, or if a committee has filed a Certificate, two years after the date of the transaction. This records retention requirement also applies to a candidate that is exempt from forming a candidate committee; a record must also be retained for two years after the date the record was created. Documentation consists of:

- copies of all contribution checks, money orders, credit card, and electronic transfers (including the use of online or web-based collection of contributions), and all documentation regarding contributors;
  - copies of all correspondence relating to the campaign's financial activity;
  - currency and coin count sheets or copies of bank deposit tickets which show cash deposits;
  - original receipts and invoices for all expenditures, including personal expenditures for reimbursement;
  - copies of all checks issued on the committee's dedicated campaign account, including cancelled and voided checks;
  - statements and records of all investments and investment accounts held by the committee;
  - payroll records and tax reports;
  - electronic transaction documents;
- and**
- a copy of any letter or email sent to a contributor requesting occupational information.

### Additionally:

- Bank statements must be retained for at least two years after the date the statement is issued by the financial institution.
- A written loan agreement must be retained for at least two years after the loan transaction is filed or until the loan is repaid, whichever is later.



In addition to the records mentioned above, the chief petitioners of any state initiative or referendum petition who compensate petition circulators, either directly or indirectly (through an agent), are also required to maintain detailed accounts. See [OAR 165-014-0100](#) for additional information.

Any information relating to a committee's dedicated campaign account, such as the name of the financial institution, the account number and any other personal identification printed on a financial institution statement (e.g., social security number, taxpayer identification number or employee identification number) are exempt from public disclosure.

## Examination of Transactions by the Elections Division

### ORS 260.205

After the deadline for filing a transaction or after a transaction is filed, whichever is later, the Elections Division has 10 business days to review the transaction and determine whether the transaction includes all of the required information required by law. If the Elections Division determines that a transaction is missing required information, the filer is notified of the insufficiency in an Exam letter sent via email which provides a deadline to correct the identified insufficiencies. If the filer determines that a transaction needs to be corrected, the filer must take action to amend the transaction.

The treasurer, candidate, alternate transaction filer, correspondence recipient, and independent expenditure filer are sent an Exam letter via email that either indicates the transaction is sufficient or identifies any of the transaction's insufficiencies that need to be corrected. An Exam letter must be completed and emailed not later than the 10 business day review deadline. The Exam letter includes a deadline for providing amendments to correct any insufficient information. The deadline is 14 business days from the date of the Exam letter, or the due date for a transaction, whichever is later. Persons associated with a committee and an independent expenditure filer should check their email or the ORESTAR Documents tab for Exam letters on a regular basis.

## Amending Transactions

A transaction may be amended by filing an amendment to the transaction in ORESTAR. An amended transaction may be filed at any time. An amended transaction must be filed if some element of the previously filed transaction is inaccurate or identified as insufficient.

If the filer is notified on an Exam letter that a transaction is insufficient, the filer must file an amended transaction to correct any identified insufficiency. If the amended transaction is filed by the deadline provided in the Exam letter, and the insufficiency is corrected, the transaction will be considered sufficient and no penalty is assessed.

If the filer believes that the transaction is sufficient the Elections Division should be contacted via a phone call or email explaining why the transaction is sufficient. See [ORESTAR User's Manual: Transaction Filing](#) for instructions on how to file amended transactions.



If the candidate, treasurer, or independent expenditure filer fails to provide the information requested in the Exam letter by the amendment deadline, they or the civil penalty designee may be subject to a civil penalty.

Not later than 90 calendar days after an amended transaction is filed, the Elections Division will examine the amended transaction and send an Amendment Review Notification letter to the candidate, treasurer, alternate transaction filer, correspondence recipient, and independent expenditure filer. If an amended transaction is insufficient, that transaction may be subject to a civil penalty.

Exam and Amendment Review Notification letters are sent using the email addresses provided by the candidate, treasurer, alternate transaction filer, and correspondence recipient on the committee's current Statement of Organization and to the email address provided in independent expenditure filer's user profile.



If the email (with the attached Exam or Amendment Review Notification letter) is returned as undeliverable for any reason, such as the email address has not been updated in the Statement of Organization, or the user has a spam blocker protecting the address which results in non-delivery of the email, or any other reason outside of the Elections Division's control, the committee may be found in violation for filing an insufficient transaction.

## Complaints Regarding Late or Insufficient Transactions

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### ORS 260.205

Any elector may file a written complaint with the Elections Division alleging that a transaction is insufficient or that a person has failed to file a transaction. The complaint should state the reasons for believing that a transaction is late or insufficient and include documentation or evidence to support the allegation. The complaint must be in writing, must be signed, and filed no later than 90 calendar days after the date the relevant transaction is filed or should have been filed, whichever is later. A complaint may be filed electronically at [sos.oregon.gov/investigation](https://sos.oregon.gov/investigation). Anonymous complaints will not be investigated.

## Subpoena Authority

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### ORS 260.218

The Elections Division, in reviewing contribution and expenditure transactions, may issue subpoenas to compel the committee to produce records, documents, books, papers, memoranda, or other information necessary to determine the sufficiency of transactions filed.

If a person fails to comply with a subpoena, a judge of the circuit court of any county shall, on application of the Elections Division, compel obedience by proceedings for contempt as in the case of disobedience of the requirements of a subpoena issued from the circuit court.

## Court Proceedings to Compel Filing of Correct Statements

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### ORS 260.225

The Secretary of State, an elections filing officer, or an elector may file a petition in the circuit court to compel committees to file contribution and expenditure transactions. The petition must be filed in the circuit court for the county in which the principal office of the appropriate elections filing officer is located.

If the court determines that the petition filed is frivolous or the court does not compel the filing of any transaction, the candidate, treasurer, or person against whom the petition was filed is entitled to recover reasonable attorney fees for trial and appeal expenses.

## Civil Penalties for Failure to File Timely or Sufficient Transactions

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### ORS 260.232

The Secretary of State may impose civil penalties for failure to file a timely or sufficient transactions or a Certificate of Limited Contributions and Expenditures. See [Payment Liability for Civil Penalties](#) on page 86 for who is responsible for payment of a civil penalty that has been imposed for any late or insufficient filing.

The maximum penalty that may be imposed by statute is 10% of the amount of each late or insufficient transaction. The Secretary of State has established penalty matrices that are used to calculate penalties for late and insufficient transactions. The penalty calculation is based on the amount of the transaction and the number of business days the transaction is submitted late. See the [Penalty Matrix: Late Filings](#), pages 80 - 81 and [Penalty Matrix: Insufficient Filings](#) pages 82 - 83

## Complaints Regarding Other Election Law Violations

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### ORS 260.345

Any elector may file a written complaint with the Elections Division alleging that a violation of an election law or rule adopted by the Secretary of State has occurred. The complaint should state the reasons for believing that the violation occurred and include documentation or evidence to support the allegation. The complaint must be in writing, must be signed, and filed no later than 90 calendar days after the election at which the violation is alleged to have occurred or 90 calendar days after the violation itself is alleged to have occurred, whichever is later. A complaint may be filed electronically at [sos.oregon.gov/investigation](https://sos.oregon.gov/investigation). Anonymous complaints will not be investigated.

## Contributions in False Name

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### ORS 260.402

It is a criminal offense to make a contribution relating to a candidate, measure, political committee, or petition committee in any name other than the person who provides the contribution (i.e., a contribution in a false name). Likewise, it is illegal to knowingly receive a contribution in a false name or enter it into a committee's account.



A violation of contribution in a false name is a class C felony, punishable by up to five years imprisonment and/or a \$125,000 fine.

## Prohibited Personal Use of Campaign Funds

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### ORS 260.407

Campaign funds may not be converted to any person's personal use. The Secretary of State may impose a penalty of \$1,000 for each violation of personal use, plus the amount converted to personal use. Campaign funds may not be used to pay any penalty imposed for a violation of ORS 260.407; the penalty must be paid from the personal funds of the person found in violation per ORS 260.995(9). See page 56 for information on what constitutes [Prohibited Use of a Committee's Campaign Funds](#).

## Campaign Funds May Not be Used to Pay a Candidate for Professional Services

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### ORS 260.409

A candidate committee may not use campaign funds to make expenditures to or on behalf of a candidate for the rendering of professional services by the candidate. The Secretary of State may impose a penalty under OAR 165-013-0010 if a candidate is found in violation of this statute. The penalty for a violation of ORS 260.409 may be paid from any source **except** the candidate's committee funds.

## Civil Penalties for Other Campaign Finance Violations

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### ORS 260.995


The Secretary of State may impose civil penalties for certain campaign finance violations in addition to late or insufficient transactions. Other campaign finance violations include:

- failure to file a Statement of Organization not later than three business days after receiving a contribution or making an expenditure;
- failure to file an amended Statement of Organization not later than 10 calendar days after a change in information;

**and**

- failure to establish a dedicated campaign account not later than three business days after receiving a contribution or making an expenditure.

The maximum penalty for each violation of these offenses is \$1,000, except for personal use of campaign funds by a person which carries a penalty of \$1,000, plus the amount of funds wrongfully converted. Campaign funds may not be used to pay any penalty assessed for a violation of personal use of campaign funds or a violation for using campaign funds to pay a candidate for professional services.

 Refer to OAR 165-013-0010 for specific penalties and procedures.

## Legislative Assembly Not Subject to Civil Process During Session

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### Article IV, §9, Oregon Constitution

Article IV, Section 9 of the Oregon Constitution provides that State Senators and State Representatives shall not be subject to any civil process during any session of the Legislative Assembly. Therefore, members of the Legislative Assembly will not be subject to the civil penalty process during a legislative session. The civil penalty process, if any, will resume after final adjournment (*Sine Die*).

# Penalty Matrix: Late Filings

## Late Filing Defined

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Penalties may be assessed for:

- a contribution or expenditure transaction that is filed after its due date; or
- a Certificate of Limited Contributions and Expenditures (PC 7) filed after its due date.

A transaction is considered late in any of the following circumstances:

- A transaction is not filed by the due date for the transaction.
- A change is made to the name of the contributor or payee after the transaction due date, resulting in a different contributor or payee being associated with the transaction. The transaction is considered late from the transaction due date to the date the amended transaction changing the contributor or payee is filed.
- A change is made to the date of the transaction resulting in a due date that is prior to the date the transaction was originally filed. The transaction is considered late from the date the transaction should have been filed to the date the transaction was originally filed.
- A change (increase or decrease) is made to the amount of a previously filed transaction after the transaction due date. The amount of the change is late from the transaction due date to the date the amended transaction changing the amount is filed.
- A previously reported transaction is deleted after the transaction due date. The transaction is considered late from the transaction due date to the date the transaction deletion is filed.
- A cash balance adjustment transaction is filed because the committee is unable to reconcile the calculated cash balance based on transactions filed with the Secretary of State with the committee's bank balance.
- A personal expenditure balance adjustment transaction is filed because the committee is unable to reconcile the calculated outstanding personal expenditure balance based on the transactions filed with the Secretary of State.
- The transaction type is amended from any transaction type other than a contribution or expenditure to a contribution or expenditure, and the original transaction was filed after the deadline. The transaction is considered late from the transaction due date to the date the original transaction is filed.

## Exceptions to What Constitutes a Late Filing

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If a candidate committee, political action committee, or petition committee receives updated information that an in-kind contribution received from another committee and reported in a transaction is inaccurate or otherwise insufficient, the committee that received the in-kind contribution must file an amended transaction.

The amended transaction may be filed without penalty if it is filed not later than the date that the transaction is required to be filed, or if the filing deadline has passed, not later than 30 calendar days after the committee received the updated information. This applies only to an in-kind contribution that needs to be deleted, or to a change to the date, amount, or contributor name associated with the transaction. If an amendment to the in-kind contribution transaction must be filed, the committee must detail the reason for the changes in the Notes field of the transaction.

This exception does not apply to a candidate committee, political action committee, or petition committee that knew, or reasonably should have known, that the information reported in the transaction was inaccurate or insufficient at the time of filing. The exception also does not apply:

- to an original in-kind contribution transaction that is filed late;
- to an amended in-kind contribution transaction which results in an insufficiency of the transaction;
- if the in-kind contributor name is amended from a committee to a person;
- or
- if the in-kind contributor name is amended from a person to a committee.



Warning: Criminal penalties may apply if transactions verified as true by the candidate or treasurer are knowingly submitted with false information.

## Penalties

The penalty for a late transaction is  $\frac{1}{2}\%$  of the amount of the transaction or  $\frac{1}{2}\%$  of the amount of the change (for an increase or decrease in transaction amount) multiplied by the number of business days the transaction is filed late.

**ex**  $\$1,000.00 \times \frac{1}{2}\% \times 16 \text{ business days} = \$80.00$

The penalty for a late [Certificate of Limited Contributions and Expenditures](#) is \$17.50 for each business day the Certificate is filed late.

The penalty for a cash balance adjustment transaction or personal expenditure balance adjustment transaction is 10% of the amount of the transaction.

If, after receiving the proposed penalty notice, the committee or independent expenditure filer determines that a transaction date was incorrectly reported thereby reducing the number of business days the transaction is filed late, there may be a reduction in the proposed civil penalty if the transaction is amended to correct the date. In order to qualify for a reduction in the civil penalty, the person must file the amended transaction no later than the deadline to request a hearing. If a hearing is requested, the amendment may be submitted up to the date of the hearing.

If the recalculated penalty reduces the penalty to less than \$75, no penalty will be imposed and no violation found.

## Maximum Penalties

The maximum penalty for each late transaction, except for a change in transaction amount, is 10% of the amount of the transaction. The maximum penalty for a change in transaction amount is 10% of the net change or 10% of the current transaction amount, whichever is less.

The maximum penalty for a late Certificate of Limited Contributions and Expenditures is \$350.

## Waiver of Penalty and Violation

If a transaction is late as a direct result of an error by the Elections Division, the violation is waived and no penalty is assessed. For example, if an error by the Elections Division resulted in a three day delay but the transaction was filed five days late, only the last two days would be enforced as a violation.

For any committee subject to reporting contributions during a legislative session, if a transaction is late and should have been filed during the three business day grace period for filing an original Statement of Organization, the violation is waived and no penalty is assessed, as long as the transaction is filed within five business days from receiving the contribution.

# Penalty Matrix: Insufficient Filings

## Insufficient Filings Defined

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A transaction is insufficient when a contribution (cash, in-kind, or loan received) or expenditure (cash expenditure, loan payment, personal expenditure, or account payable) is missing one or more of the following items of required information or an item of information provided is not sufficient:

- contributor's name;
- contributor's address (not including zip code);
- contributor's occupational information;
- name of payee;
- payee's address (city and state);
- purpose of expenditure;
- or
- terms of loan made or received.

After the deadline for filing a transaction or after a transaction is filed, whichever is later, the Elections Division has 10 business days to review the transaction and determine whether the transaction includes all of the information required by law.

The treasurer, candidate, alternate transaction filer, correspondence recipient, and independent expenditure filer are sent an Exam letter via email that either indicates the transaction is sufficient or identifies any of the transaction's insufficiencies that need to be corrected. The letter includes a deadline for providing amendments to correct any insufficient information.



See [Amending Transactions](#) on page 76.



The deadline to amend an insufficient transaction is 14 business days from the date of the Exam letter, or 14 business days from the due date for a transaction, whichever is later.

If the requested information is filed by the amendment deadline provided in the Exam letter and is deemed sufficient, there is no penalty for insufficiency. If the candidate, treasurer or independent expenditure filer fails to provide the information requested in the Exam letter by the amendment deadline, the person required to correct the insufficiency will be subject to a penalty.

Not later than 90 calendar days after an amended transaction is filed, the Elections Division will examine the amended transaction and send an Amendment Review Notification letter to the committee. If an amended transaction is filed and is insufficient, that transaction may result in a civil penalty.

## Penalties

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The penalty is \$10 per item for all missing or insufficient items, except for the failure to provide the terms of a loan made or received, which is 1% of the loan amount.

Omitted or insufficient information submitted after the amendment deadline but prior to the deadline for a candidate, treasurer, or independent expenditure filer to request a hearing will result in a 50% per item reduction of the penalty, if the information is deemed sufficient. If a hearing is requested, the omitted or insufficient information may be submitted up to the date of the hearing, and if deemed sufficient, will result in a 50% per item reduction of the penalty.

### Maximum Penalties

The maximum penalty for each insufficient transaction is 10% of the amount of the transaction or \$10, whichever is less.

### Waiver of Penalty and Violation

If an insufficiency is the direct result of an error by the Elections Division, the violation is waived and no penalty is assessed.

If the total penalty for a case is less than \$75, a proposed penalty notice will not be issued and there will be no violation found.

## Contested Case Procedures

### ORS 260.232

Late and insufficient violations are processed by calendar month. Each case for a given month will include any transactions that are filed late and/or any insufficient transactions that are not sufficiently corrected by the exam response due date in that particular month. Laws, administrative rules, and the campaign finance manual in effect at the time the transaction is filed or, if the transaction is insufficient, in effect on the deadline to respond to the insufficiency will be enforced and govern campaign finance reporting requirements. Generally, cases for a particular month are reviewed and generated approximately three months after the end of a month. If the total calculated penalty for a case is less than \$75, a proposed penalty notice will not be issued.


### Issuance of Proposed Penalty Notice

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If the Secretary of State determines that a committee or independent expenditure filer is in violation of Oregon election law because late and/or insufficient transactions were filed or a Certificate of Limited Contributions and Expenditures is filed late, and the total calculated penalty is \$75 or more, the Elections Division will create a case and deliver by first class mail or by email a Notice of Proposed Civil Penalty (proposed penalty notice) to the individual who is liable for the violations. The notice is sent to:

- the treasurer of a political action committee or petition committee, or if applicable, the civil penalty designee;
- the candidate of a candidate committee and the designated treasurer of a candidate committee; or
- an independent expenditure filer.

The notice informs the liable individual of the potential penalty and provides an opportunity to request a hearing if there is a mitigating circumstance that directly caused the late or insufficient filing.


 A hearing request can be filed only by the person subject to the civil penalty, or an attorney representing the person.

## Mitigating Circumstances


The Elections Division will consider mitigating circumstances claimed by a committee. If the mitigating circumstances are presented with a hearing request, the Elections Division will consider them and will refer the case to the Office of Administrative Hearings if the Division does not agree. If received after 20 days, but before 30 days after the service date of the notice of proposed civil penalty, the Division will still consider the circumstances, but the committee will no longer be eligible for a hearing. If the Division determines that the committee has presented valid mitigating circumstances, the penalties at issue will be waived or reduced without a hearing before an Administrative Law Judge.

The only mitigating circumstances that may be considered in a late or insufficient filing case are:

- The lateness or insufficiency of a transaction is the direct result of clearly-established fraud, embezzlement, or other criminal activity against the committee, committee treasurer, candidate, alternate transaction filer, or independent expenditure filer, as determined in a criminal or civil action in a court of law or independently corroborated by a report of a law enforcement agency or insurer, or the sworn testimony or affidavit of an accountant or bookkeeper or the person who actually engaged in the criminal activity. This mitigating circumstance does not apply to the candidate, treasurer, alternate transaction filer, or independent expenditure filer who was the perpetrator of the wrongdoing described above.


 If the criminal or civil action in a court of law results in a monetary judgement (including restitution) in favor of the candidate or committee treasurer, the Elections Division civil penalty must be paid if the judgement is collected.

- The lateness or insufficiency of a transaction is the direct result of fire, flood, utility failure, or other calamitous event, resulting in physical destruction of, or inaccessibility to campaign finance records.

 “Calamitous event” means a phenomenon of an exceptional character, the effects of which could not have been reasonably prevented or avoided by the exercise of due care or foresight.


- The lateness or insufficiency of a transaction is the direct result of failure of a professional delivery service to deliver documents in the time guaranteed for delivery by written receipt of the service provider. This does not include delivery by fax.

- The lateness or insufficiency of a transaction is the direct result of an error by the elections filing officer.

 The “elections filing officer” means the Secretary of State, Elections Division.

One additional circumstance that will only be considered in a late filing case is:

- The lateness of a transaction is the direct result of a valid personal emergency of the candidate, treasurer, alternate transaction filer, or independent expenditure filer. In this case, independent written verification must be provided.

 A valid personal emergency is an emergency, such as a serious personal illness or death in the immediate family of the candidate, treasurer, alternate transaction filer, or independent expenditure filer which caused the transaction to be late. Personal emergency does not include a common cold or flu, or long-term illness where other arrangements could have been made.

Only the circumstances listed above, if proven, may be considered in reducing a penalty. When mitigating circumstances are applied, they apply only to transactions where the specific circumstance(s) directly caused the lateness or insufficiency. Committees must identify all transactions affected within 30 days.

## Waiver of Penalty and Violation

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If a transaction is late or insufficient as the direct result of an error by the elections filing officer, the violation is waived and no penalty is assessed.

## Responding to Proposed Penalty Notice

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When an individual receives a proposed penalty notice, they can either:

- choose to pay the penalty;
- wait until the Election Division issues a default final order assessing the civil penalty;
- claim an applicable mitigating circumstance as defined in this manual;

or

- contest the charges by either submitting notarized testimony, or requesting an in-person or telephone hearing with an administrative law judge.



A hearing request can be filed only by the person subject to the civil penalty, or an attorney representing the person.

## Paying the Civil Penalty

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If the person chooses to pay the penalty:

- Payment may be submitted by check made payable to the Secretary of State;
- Payment may be made by credit card over the phone;
- Payment may be mailed to the Elections Division, at any time after the proposed penalty notice is issued, but must be received not later than 70 calendar days after the service date of the default final order;

or

- If necessary, the person may contact the Elections Division to discuss payment plan options.

## Contest the Charges by Requesting a Hearing

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To contest the charges, the person must submit a signed Hearing Request Form (SEL 851) and an answer to the violations pursuant to applicable Oregon administrative rules and/or Oregon Revised Statutes; the request and answer must be received by the Elections Division not later than 20 calendar days after the service date on the proposed penalty notice.

If the Elections Division receives the signed and sufficient Hearing Request Form, the case will be referred to the Office of Administrative Hearings. The process outlined in the applicable Oregon administrative rules and/or Oregon Revised Statutes will be followed to conduct the hearing.

## Final Orders

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Final orders are issued after the deadline to request a hearing has passed or, if the charges were contested and a hearing was conducted, after the administrative law judge issues a proposed order. If the final order assesses a civil penalty, the liable party has 70 calendar days to pay the penalty. After the issuance of a final order the liable party is entitled to judicial review of the order. Judicial review may be obtained by filing a petition for review with the Oregon Court of Appeals within 60 calendar days of the service date of the order.

## Payment Liability for Civil Penalties

For political action committees or petition committees, the treasurer or civil penalty designee is personally liable for penalties imposed for late or insufficient filings of contribution and expenditure transactions. For candidate committees, the candidate is liable for penalties imposed. The independent expenditure filer is liable for penalties imposed. While the persons named above are personally responsible for payment of any penalty imposed, there is nothing that prohibits a penalty from being paid using committee funds or any other source.

Uncontested civil penalties may be paid at any time after receiving the proposed penalty notice, but are due no later than 70 calendar days after the service date of a default final order or final order, unless an appeal is filed. Payment is made to the Secretary of State. Payment may be made using a credit card by contacting the Elections Division. Civil penalties are paid into the State Treasury and credited to the General Fund.



Penalties for most campaign finance violations may be paid from any source. A penalty paid from committee funds must be reported as an expenditure. Committee funds may not be used to pay penalties for violations of ORS 260.407 ([Prohibited Personal Use](#)) or ORS 260.409 ([Expenditures for Professional Services Rendered by Candidate](#)) or an equivalent provision of a county or city charter or ordinance.

### Payment Liability for Penalty Imposed for Late Transactions or a Late Certificate

For a **political action committee or petition committee**, the treasurer responsible for any late filing penalty is the treasurer or the civil penalty designee (if applicable) of record (i.e., listed on the Statement of Organization at the time the transaction is due).

For a **candidate committee**, the candidate is responsible for any late filing penalty, even if the late transaction or certificate is filed by the designated treasurer.

For a **filer of independent expenditures**, the individual registered as the filer is responsible for any late filing penalty.



The liability for the civil penalty remains with the treasurer or the civil penalty designee of a political action committee and petition committee, and the candidate for a candidate committee, even if the late transaction is filed by the designated alternate transaction filer.

### Payment Liability for Penalty Imposed for Insufficient Transactions

For a **political action committee or petition committee**, the treasurer responsible for an insufficient filing penalty is the treasurer who filed the transaction that was insufficient or the civil penalty designee applicable at the time the insufficient transaction was filed by the treasurer.

For a **candidate committee**, the candidate is responsible for any insufficient filing penalty, even if the insufficient transaction is filed by the designated treasurer.

For a **filer of independent expenditures**, the individual registered as the filer is responsible for any insufficient penalty.




The liability for the civil penalty remains with the treasurer or the civil penalty designee of a political action committee and petition committee, and the candidate for a candidate committee, even if the insufficient transaction is filed by the designated alternate transaction filer.

## Payment Liability for Penalty Imposed for Cash Balance Adjustment or Personal Expenditure Balance Adjustment Transactions

For a **political action committee** or **petition committee**, the treasurer responsible for a cash balance adjustment or personal expenditure balance adjustment penalty is the treasurer who filed the adjustment transaction or the civil penalty designee applicable at the time the balance adjustment transaction is filed.

For a **candidate committee**, the candidate is responsible for a cash balance adjustment penalty or personal expenditure balance adjustment even if the adjustment transaction is filed by the designated treasurer.

-  The liability for the civil penalty remains with the treasurer or civil penalty designee of a political action committee and petition committee, and the candidate for a candidate committee, even if the transaction is filed by the designated alternate transaction filer.




While the individuals named in the paragraphs above are personally liable for payment of any penalty imposed, the penalty may be paid from any source including committee funds.

## Instructions for Completing Forms

Most forms can be filed electronically or by paper. Paper filings will be converted to an electronic document and will become the official record.


### Completing the Statement of Organization (Original, Amendment, or Discontinuation)

This section explains the information required for each field of information on a Statement of Organization. Some fields included in this section only apply to paper filings. There are three types of Statements of Organization and they can be filed either online through ORESTAR or by using one of the following paper forms:

-  Form [SEL 220: Statement of Organization for Candidate Committee](#);
-  Form [SEL 221: Statement of Organization for Political Action Committee](#); and
-  Form [SEL 222: Statement of Organization for Petition Committee](#).

For steps on filing the Statement of Organization electronically, refer to the [ORESTAR User's Manual: Statement of Organization](#).

If any of the required information is incomplete or insufficient, the Elections Division will notify the committee by phone, or in writing, including by email, of the deficiencies on the forms. The filing will not be processed or considered filed until the required information is provided.

-  The committee address must be publicly disclosed. Do not list an exempt address. Committees should not provide the address, phone number, or email address of a person who has obtained an exemption from disclosure as a public record to minimize the risk of inadvertent disclosure.

### Candidate Committee

**Filing Type:** Must indicate the filing type. To file a new committee, select Original. To make changes or update a filing, select Amendment. To close the committee, select Discontinuation.

**Name of Committee:** Must provide the name of the committee and it must match the name of the bank account.

**Committee Street Address:** Do not use a post office box number. Must provide the street address of a residence, office, headquarters, or similar location where the candidate or a responsible officer of the committee can be located. The address must be in Oregon and must be publicly disclosable. Do not list an exempt address.

**Campaign Phone Number:** May provide a phone number where a committee member can be reached. If provided, the number must be publicly disclosable. Do not list an exempt phone number.

**Name of Candidate:** Must include at least the first and last name.

**Candidate Address:** Do not use a post office box number. Must provide the street address of a residence, office, headquarters, or similar location where the candidate can conveniently be located.

**Candidate Mailing Address:** Must provide an address where the candidate wants to receive written correspondence from the Elections Division.

**Candidate's Occupational Information:** If not employed, a homemaker, retired, or a student, select Not Employed. No further occupational information is required.

If self-employed, select Self-Employed and must provide the nature of the primary job of the candidate in the **Occupation** field.

If employed by another person, must provide the nature of the primary job of the candidate in the **Occupation** field. Must also provide the **Employer's Name, City and State** in the appropriate fields.



See [Occupational Information](#) on page 30 for how the Elections Division defines occupation.

**Candidate Phone and Fax Numbers:** May provide a phone number where the candidate can be reached during normal business hours. May provide the candidate's fax number, if the candidate has one.

**Candidate Email Address:** Must provide an email address where the candidate can be reached.

**Name of Treasurer:** Must include at least the first and last name. The treasurer must be an Oregon elector.

**Treasurer Mailing Address:** Must provide an address where the treasurer wants to receive written correspondence from the Elections Division.

**Treasurer Phone and Fax Numbers:** May provide a phone number where the treasurer can be reached during normal business hours. May provide the treasurer's fax number, if the treasurer has one.

**Treasurer Email Address:** Must provide an email address where the treasurer can be reached.

**Election Information:** Designate the specific election in which the individual will be a candidate. A candidate nominated at the primary election must amend the Statement of Organization to indicate participation in the general election.

List the office sought by the candidate. Include the county, district, position, department, or zone number, if applicable. If the office is unknown, indicate "unknown office".

**Party Affiliation:** Must select the political party that indicates the candidate's party affiliation even if the candidate has been nominated by multiple political parties. A candidate running for a nonpartisan office should not complete this section.

**Committee Director:** A committee director is any person who directly and substantially participates in decision-making on behalf of the committee concerning the solicitation or expenditure of funds. If any person meets the definition of a director they must be designated on the Statement of Organization. **A candidate committee is not required to have committee directors.** The candidate is assumed to directly and substantially participate in decision making on behalf of the committee and does not need to be designated as a director.

If two or more of the directors are also directors of another political committee, list the names of those directors and the name and address of the other political committee.

**Name of Director:** If a director is designated, must include at least the first and last name.

**Director Address:** Must provide the address of a residence, office, headquarters, post office box or similar location where the director can conveniently be reached.

**Director's Occupational Information:** If not employed, homemaker, retired, or a student, select Not Employed. No further occupational information is required.

If self-employed, select Self-Employed and must provide the nature of the primary job of the director in the **Occupation** field.

If employed by another person, must provide the nature of the primary job of the director in the **Occupation** field. Must also provide the **Employer's Name, City and State** in the appropriate fields.



See [Occupational Information](#) on page 30 for how the Elections Division defines occupation.

**Director Phone:** May provide a phone number where the director can be reached during normal business hours.

**Name of Alternate Transaction Filer:** Designating an alternate transaction filer is optional. If an alternate transaction filer is designated, must include at least the first and last name. This is an individual designated to file transactions but who does not have liability for late or insufficient transactions. If designated, this individual must be someone other than the candidate or treasurer.

**Alternate Transaction Filer Mailing Address:** Must provide an address where the alternate transaction filer wants to receive written correspondence from the Elections Division.

**Alternate Transaction Filer Email Address:** Must provide an email address where the alternate transaction filer can be reached.

**Alternate Transaction Filer Phone:** May provide a phone number where the alternate transaction filer can be reached during normal business hours.

**Name of Correspondence Recipient:** Designating an individual as the correspondence recipient is optional. If a correspondence recipient is designated, must include at least the first and last name. The individual designated will receive notices and other correspondence issued by the Elections Division. If designated, this individual must be someone other than the candidate or treasurer.

**Correspondence Recipient Mailing Address:** Must provide an address where the correspondence recipient wants to receive written correspondence from the Elections Division.

**Correspondence Recipient Email Address:** Must provide an email address where the correspondence recipient can be reached.

**Correspondence Recipient Phone:** May provide a phone number where the correspondence recipient can be reached during normal business hours.

**Other Election Activity:** If the candidate is active at an election in which her or his name is not on the ballot, indicate the type of activity.



See [Active in an Election](#) on page 17 for more information.

**Name of Oregon Financial Institution:** Must include the name of the Oregon financial institution where the committee has established or expects to establish the committee bank account.

**Name of Account:** This must be identical to the official name of the committee.

**Name of Account Holder:** Must include the name of the candidate or the name of the committee. If the candidate is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

**Names of Persons Who Have Signature Authority:** The candidate and treasurer must be signers on the campaign account. Other signatories may also be designated.

**Signatures of Candidate and Treasurer:** A candidate and treasurer (if applicable) must sign and date each Statement of Organization filed. In signing the Statement of Organization, the candidate and treasurer are attesting they understand the potential liability of being a candidate or treasurer and that the information provided is true and correct.

## Political Action Committee

**Filing Type:** Must indicate the filing type. To file a new committee, select Original. To make changes or update a filing, select Amendment. To close the committee, select Discontinuation.

**Name of Committee:** Must provide the name of the committee and it must match the name of the bank account.

**Committee Acronym:** May provide an acronym of the committee's name.

**Committee Street Address:** Do not use a post office box number. Must provide the street address of a residence, office, headquarters, or similar location where the candidate or a responsible officer of the committee can be located. The address must be in Oregon and must be publicly disclosable. Do not list an exempt address.

**Campaign Phone Number:** May provide a phone number where a committee member can be reached. If provided, the number must be publicly disclosable. Do not list an exempt phone number.

**Name of Treasurer:** Must include at least the first and last name. The treasurer must be an Oregon elector.

**Treasurer Mailing Address:** Must provide an address where the treasurer wants to receive written correspondence from the Elections Division.

**Treasurer Phone and Fax Numbers:** May provide a phone number where the treasurer can be reached during normal business hours. May provide the treasurer's fax number, if the treasurer has one.

**Treasurer Email Address:** Must provide an email address where the treasurer can be reached.

**Committee Director:** A committee director is any person who directly and substantially participates in decision-making on behalf of the committee concerning the solicitation or expenditure of funds. If any person meets the definition of a director they must be designated on the Statement of Organization. The treasurer of a political action committee may also be listed as a director but must list at least one other director who is not the treasurer. The officers of a political party shall be considered the directors of any political party committee of that party and must be designated on the Statement of Organization, unless otherwise provided in the party's bylaws.

If two or more of the directors are also directors of another political committee, list the names of those directors and the name and address of the other political committee.

**Name of Director:** Must include at least the first and last name.

**Director Address:** Must provide the address of a residence, office, headquarters, post office box or similar location where the director can conveniently be reached.

**Director's Occupational Information:** If not employed, homemaker, retired, or a student, select Not Employed. No further occupational information is required.

If self-employed, select Self-Employed and must provide the nature of the primary job of the director in the **Occupation** field.

If employed by another person, must provide the nature of the primary job of the director in the **Occupation** field. Must also provide the **Employer's Name, City and State** in the appropriate fields.



See [Occupational Information](#) on page 30 for how the Elections Division defines occupation.

**Director Phone:** May provide a phone number where the director can be reached during normal business hours.

**Name of Alternate Transaction Filer:** Designating an alternate transaction filer is optional. If an alternate transaction filer is designated, must include at least the first and last name. This is an individual designated to file transactions but who does not have liability for late or insufficient transactions. If designated, this individual must be someone other than the treasurer. The individual may also be a director or civil penalty designee.

**Alternate Transaction Filer Mailing Address:** Must provide an address where the alternate transaction filer wants to receive written correspondence from the Elections Division.

**Alternate Transaction Filer Email Address:** Must provide an email address where the alternate transaction filer can be reached.

**Alternate Transaction Filer Phone:** May provide a phone number where the alternate transaction filer can be reached during normal business hours.

**Name of Correspondence Recipient:** Designating an individual as the correspondence recipient is optional. If a correspondence recipient is designated, must include at least the first and last name. The individual designated will receive notices and other correspondence issued by the Elections Division. If designated, this individual must be someone other than the treasurer. The individual may also be a director or civil penalty designee.

**Correspondence Recipient Mailing Address:** Must provide an address where the correspondence recipient wants to receive written correspondence from the Elections Division.

**Correspondence Recipient Email Address:** Must provide an email address where the correspondence recipient can be reached.

**Correspondence Recipient Phone:** May provide a phone number where the correspondence recipient can be reached during normal business hours.

**Name of Civil Penalty Designee:** Designating an individual as the civil penalty designee is optional. If a civil penalty designee is designated, must include at least the first and last name. This individual must be an Oregon elector and is liable for any civil penalty imposed for late or insufficient transactions. This individual must be someone other than the treasurer and must agree to serve as civil penalty designee by signing a paper Statement of Organization.

A Statement of Organization that has a civil penalty designee must be filed using the paper forms. The completed forms can be printed, signed, and filed with the Elections Division. The forms may be mailed, faxed, scanned and emailed to [orestar-support.sos@sos.oregon.gov](mailto:orestar-support.sos@sos.oregon.gov) or hand delivered.

**Civil Penalty Designee's Mailing Address:** Must provide an address where the civil penalty designee wants to receive written correspondence from the Elections Division.

**Civil Penalty Designee's Email:** Must provide an email address where the civil penalty designee can be reached.

**Civil Penalty Designee's Phone:** May provide a phone number where the civil penalty designee can be reached during normal business hours.

**Nature of Political Action Committee:** Must provide a description of the general nature of the committee.

**Example**

"Support all candidates and measures advocating health care for all."

"Supports candidates that oppose tax increases."

**Controlled Committee Information:** Must answer yes or no to the question. If yes, must identify the candidate(s) that control the committee.

All caucus committees are controlled committees. A "controlled committee" is a political action committee that, in connection with the making of contributions or expenditures:

→ is controlled directly or indirectly by a candidate or by another controlled committee;

or

→ acts jointly with a candidate or another controlled committee.

A candidate controls a political action committee if:

→ the candidate, the candidate's agent, a member of the candidate's immediate family, or any other political committee that the candidate controls has a significant influence on the actions or decisions of the political action committee;

or

→ the candidate's committee and the political action committee both have the candidate or a member of the candidate's immediate family as a treasurer or director.

**Type of Political Action Committee:** Must identify the type of committee.

A "miscellaneous committee" is a committee that supports or opposes one or more of the following:

→ specific candidate(s);  
→ entire ticket of a political party;

or

→ candidate(s) and measure(s).

A "caucus committee" is a committee affiliated with a caucus in either chamber of Oregon's Legislative Assembly.

A "recall committee" is a committee supporting or opposing a person subject to a recall election. A recall committee cannot be formed until a recall election is certified to the ballot.

A "measure committee" is a committee that exclusively supports or opposes one or more measures that are certified to the ballot. A measure committee must not contribute to candidates, miscellaneous committees, political parties, caucus committees, recall committees, or fund independent expenditures in support of or in opposition to candidates. If a measure committee wishes to make such expenditures, it must amend its Statement of Organization to become a miscellaneous committee.

A "political party committee" is a major or minor political party qualified under ORS Chapter 248 or a committee established by a major or minor party under party bylaws (e.g., county central committees).

**Party Affiliation for Political Party Committees:** Political party committees must identify the party the committee is affiliated with.

**Measure Information:** If supporting or opposing a measure(s), must provide the measure number, indicate support or opposition, and list the election at which the measure(s) will be voted on.

**Recall Information:** If supporting or opposing a recall(s), must provide the date of the special recall election, indicate support or opposition of the recall, and identify the candidate(s) by listing their name, the name of the office, and district or position number, if applicable.

"Support" means the committee supports the recall of the candidate and "oppose" means the committee opposes the recall of the candidate (i.e., wants the candidate to remain in office).


**Name of Oregon Financial Institution:** Must include the name of the Oregon financial institution where the committee has established or expects to establish the committee bank account.

**Name of Account:** This must be identical to the official name of the committee.

**Name of Account Holder:** For a political action committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

**Names of Persons Who Have Signature Authority:** The treasurer must be a signer on the campaign account. Other signatories may also be designated.

**Signatures of Treasurer and Civil Penalty Designee:** A treasurer must sign and date each Statement of Organization filed. In signing the Statement of Organization, the treasurer is attesting they understand the potential liability of being a treasurer and that the information provided is true and correct.

 If a political action committee also has a civil penalty designee, an individual that accepts liability for any penalty assessed for a late or insufficient transaction, that individual must also sign and date the Statement of Organization.

## Petition Committee

**Filing Type:** Must indicate the filing type. To file a new committee, select Original. To make changes or update a filing, select Amendment. To close the committee, select Discontinuation.

**Name of Committee:** Must provide the name of the committee and it must match the name of the bank account.

**Committee Acronym:** May provide an acronym of the committee's name.

**Committee Street Address:** Do not use a post office box number. Must provide the street address of a residence, office, headquarters, or similar location where the candidate or a responsible officer of the committee can be located. The address must be in Oregon and must be publicly disclosable. Do not list an exempt address.

**Campaign Phone Number:** May provide a phone number where a committee member can be reached. If provided, the number must be publicly disclosable. Do not list an exempt phone number.

**Name of Treasurer:** Must include at least the first and last name. The treasurer must be an Oregon elector.

**Treasurer Mailing Address:** Must provide an address where the treasurer wants to receive written correspondence from the Elections Division.

**Treasurer Phone and Fax Numbers:** May provide a phone number where the treasurer can be reached during normal business hours. Provide the treasurer's fax number, if the treasurer has one.

**Treasurer Email Address:** Must provide an email address where the treasurer can be reached.

**Name of Chief Petitioner(s):** Must provide at least the first and last name of the chief petitioner(s). A recall committee may only have one chief petitioner. The names must match the names listed on the prospective petition.

**Chief Petitioner(s) Address:** Must provide the address of a residence, office, headquarters, post office box or similar location where the chief petitioner can conveniently be reached.

**Chief Petitioner(s) Phone Number:** May provide a phone number where the chief petitioner(s) can be reached during normal business hours.

**Name of Alternate Transaction Filer:** Designating an alternate transaction filer is optional. If an alternate transaction filer is designated, must include at least the first and last name. This is an individual designated to file transactions but who does not have liability for late or insufficient transactions. If designated, this individual must be someone other than the treasurer. The individual may also be a director or civil penalty designee.

**Alternate Transaction Filer Mailing Address:** Must provide an address where the alternate transaction filer wants to receive written correspondence from the Elections Division.

**Alternate Transaction Filer Email Address:** Must provide an email address where the alternate transaction filer can be reached.

**Alternate Transaction Filer Phone:** May provide a phone number where the alternate transaction filer can be reached during normal business hours.

**Name of Civil Penalty Designee:** Designating an individual as the civil penalty designee is optional. If a civil penalty designee is designated, must include at least the first and last name. This individual must be an Oregon elector and is liable for any civil penalty imposed for late or insufficient transactions. This individual must be someone other than the treasurer and must agree to serve as civil penalty designee by signing a paper Statement of Organization.

A Statement of Organization that has a civil penalty designee must be filed using the paper forms. The completed forms can be printed, signed, and filed with the Elections Division. The forms may be mailed, faxed, scanned and emailed to [orestar-support.sos@sos.oregon.gov](mailto:orestar-support.sos@sos.oregon.gov) or hand delivered.

**Civil Penalty Designee's Mailing Address:** Must provide an address where the civil penalty designee wants to receive written correspondence from the Elections Division.

**Civil Penalty Designee's Email:** Must provide an email address where the civil penalty designee can be reached.

**Civil Penalty Designee's Phone:** May provide a phone number where the civil penalty designee can be reached during normal business hours.

**Jurisdiction:** Must indicate the jurisdiction where the prospective petition was filed.

**Petition Information:** Identify the type of petition (initiative, referendum, or recall) the committee is sponsoring.

For an initiative or referendum petition, must indicate the petition ID number assigned by the filing officer.

For a recall petition, must indicate the name of the office holder against whom the recall petition has been filed and the name of the office, and district or position number, if applicable.

**Name of Oregon Financial Institution:** Must include the name of the Oregon financial institution where the committee has established or expects to establish the committee bank account.

**Name of Account:** This must be identical to the official name of the committee.

**Name of Account Holder:** For a petition committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

**Names of Persons Who Have Signature Authority:** The treasurer must be a signer on the campaign account. Other signatories may also be designated.

**Signatures of Treasurer and Civil Penalty Designee:** A treasurer must sign and date each Statement of Organization filed. In signing the Statement of Organization, the treasurer is attesting they understand the potential liability of being a treasurer and that the information provided is true and correct.



If a petition committee also has a civil penalty designee, an individual that accepts liability for any penalty assessed for a late or insufficient transaction, that individual must also sign and date the Statement of Organization.

## Completing the Certificate of Limited Contributions and Expenditures

This section explains the information required for each field of information on a Certificate of Limited Contributions and Expenditures (form PC 7). The certificate form can be filed either online through ORESTAR or by using the following paper form:



[Form PC 7: Certificate of Limited Contributions and Expenditures.](#)

For steps on filing the certificate electronically, refer to the [ORESTAR User's Manual: Transaction Filing](#).

If any of the required information is incomplete or insufficient, the Elections Division will notify the committee by phone, or in writing, including by email, of the deficiencies on the forms. The filing will not be processed or considered filed until the required information is provided.

**Year Filing Certificate:** Must indicate the year the Certificate is being filed for.

**Cash Balance as of January 1:** Must indicate the cash balance in the committee's bank account as of January 1 of the calendar year. If the committee didn't have a bank account on January 1, this field should reflect a zero balance.

**Committee Name:** Must provide the name of the committee.

**Committee ID:** If available, provide the unique committee ID number assigned by the Elections Division.

**Candidate Name:** Include the name of the candidate. Not required for Political Action or Petition Committees.

**Treasurer Information:** Include the name of the treasurer. This field is not required if the candidate is also the treasurer.

**Signature of Candidate or Treasurer:** The candidate or treasurer must sign and date the Certificate. In signing, the individual is attesting the information is true and correct, and may be liable for penalties imposed, among other requirements.

## Forms That Must Be Filed Using Paper

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The following forms cannot be filed electronically in ORESTAR and must be filed using the PDF fillable forms available online at [www.oregonvotes.gov](http://www.oregonvotes.gov). The two forms listed below are filed only by a corporation when the major source of revenue for the corporation is paid-in-capital and the primary purpose of the corporation is to support or oppose a candidate, measure, or political party, and the corporation has made a contribution or an expenditure for that purpose. Further, the SEL 221 (Statement of Organization for Political Action Committee) and SEL 222 (Statement of Organization for Petition Committee) must be filed using the paper if the committee has a Civil Penalty Designee.



Form [PC 3: Cash Expenditures and Loan Payments Form](#)



Form [PC 12: Statement of Corporate Paid-In-Capital](#)

Depending on the type of organization and the organization's activities, the corporation may also be required to file a [Statement of Organization for Political Action Committee form \(SEL 221\)](#).

# Information Sources

## Business Registration

For information about business registration and business regulations contact:

Corporations Division

Public Service Building

255 Capitol Street NE, Suite 151

Salem, OR 97310-1327

☎ 503 986 2200

✉ [corporationdivision.sos@sos.oregon.gov](mailto:corporationdivision.sos@sos.oregon.gov)

📍 [sos.oregon.gov/business](http://sos.oregon.gov/business)

## Campaign Finance Reporting

For questions regarding Oregon's campaign finance reporting requirements contact:

Secretary of State

Elections Division

255 Capitol Street NE, Suite 126

Salem, OR 97310-0722

☎ 866 673 8683 or 503 986 1518

fax 503 373 7414

✉ [orestar-support.sos@sos.oregon.gov](mailto:orestar-support.sos@sos.oregon.gov)

📍 [www.oregonvotes.gov](http://www.oregonvotes.gov)

## Federal Elections

For questions regarding federal candidates or committees or federal election regulations contact:

Federal Election Commission

999 E Street NW

Washington, DC 20463

☎ 800 424 9530

📍 [www.fec.gov](http://www.fec.gov)

## Federal Communications

For questions regarding federal regulations on radio and television broadcasts contact:

Federal Communications Commission

445 12th Street SW

Washington, DC 20554

☎ 888 225 5322

fax 866 418 0232

📍 [www.fcc.gov](http://www.fcc.gov)

## IRS Reporting Requirements

For questions regarding IRS reporting requirements for political committees contact:

Internal Revenue Service

☎ 800 829 1040

📍 [www.irs.gov/charities-non-profits/political-organizations](http://www.irs.gov/charities-non-profits/political-organizations)

## Oregon Department of Revenue (Tax Credits)

For information about income tax credits for political contributions contact:

Revenue Building

955 Center Street NE

Salem, OR 97301-2555

☎ 800 356 4222 or 503 378 4988

📍 [www.oregon.gov/DOR](http://www.oregon.gov/DOR)

## Oregon Government Ethics

For questions regarding enforcement of Oregon's government ethics and lobbyist registration laws contact:

Oregon Government Ethics Commission


3218 Pringle Road SE, Suite 220

Salem, OR 97302-1544

☎ 503 378 5105

fax 503 373 1456

📍 [www.oregon.gov/ogec](http://www.oregon.gov/ogec)

 The ethics laws cover such matters as disclosure of conflicts of interest, use of public office for personal gain, and statements of economic interest. The lobby regulation laws provide guidelines and specify certain requirements for lobbyists.

## Political Signs

For questions regarding political signs contact the elections filing officer for the jurisdiction where the signs are located.

For questions regarding political signs that are visible from state highways contact:

Oregon Department of Transportation

355 Capitol Street NE, MS 11

Salem, OR 97301-3871

☎ 888 275 6368

fax 503 986 3432

📍 [www.oregon.gov/ODOT](http://www.oregon.gov/ODOT)

## Raffle License

For questions regarding applying for a raffle license or status as a nonprofit entity contact:

Department of Justice Charitable Activities Section

100 SW Market Street

Portland, OR 97201

☎ 971 673 1880

fax 971 673 1882

✉ [charitable.activities@doj.state.or.us](mailto:charitable.activities@doj.state.or.us)

📍 [www.doj.state.or.us/charitable-activities](http://www.doj.state.or.us/charitable-activities)

## Definitions

As used in this manual, unless the context requires otherwise, the following terms mean:

### Account Payable

An amount owed to a creditor for goods or services.

### Address

Includes street number and name, rural route number or post office box, city, state, and zip code. For individual contributors, address means that place where the individual receives personal financial correspondence: personal residence, post office box, or place of employment. For payees, address is the city and state where the payee is located, or county if the payee is not located in a city.

### Agent

Any person who has:

→ actual oral or written authority, either express or implied, to make or to authorize the making of expenditures on behalf of a candidate or on behalf of a political committee supporting or opposing a measure;

**or**

→ been placed in a position within the campaign organization where it would reasonably appear that in the ordinary course of campaign-related activities the person may authorize expenditures.

### Aggregate

The total amount of contributions, including cash contributions, non-exempt loans received, co-signer obligations (except obligations of the candidate's spouse), and in-kind contributions received from the same contributor in a calendar year.

The total amount of expenditures, including accounts payable, cash, personal expenditures for reimbursement, and non-exempt loan payments made to the same payee in a calendar year.

### Amendment

An addition, correction, or deletion of information to a transaction or Statement of Organization that has already been filed.

### Business Days

Calendar days excluding weekends and legal holidays as provided in ORS 187.010 and 187.020.

### Calendar Year

January 1 - December 31.

### Candidate

"Candidate" includes any of the following:

- an individual whose name is printed on a ballot, for whom a declaration of candidacy, nominating petition or certificate of nomination to public office has been filed, or whose name is expected to be or has been presented, with the individual's consent, for nomination or election to public office;
  - an individual who has solicited or received and accepted a contribution, made an expenditure, or given consent to an individual, organization, political party or political committee to solicit or receive and accept a contribution or make an expenditure on the individual's behalf to secure nomination or election to any public office at any time, whether or not the office for which the individual will seek nomination or election is known when the solicitation is made, the contribution is received and retained or the expenditure is made, and whether or not the name of the individual is printed on a ballot;
- or**
- a public office holder against whom a recall petition has been completed and filed.

### Civil Penalty Designee

A person designated on the Statement of Organization for a Political Action Committee or Petition Committee that is personally liable for any penalty imposed for a late or insufficient transaction.

## City Offices

The elected public offices of a city. City offices typically include a Mayor, City Councilors, a municipal Judge, and other officers the city council considers necessary for the conduct of business. The offices may vary depending upon the city's charter and ordinances. Contact the city elections filing officer for any questions regarding city offices.

## Committee Director

Any person who directly and substantially participates in decision-making on behalf of a political committee concerning the solicitation or expenditure of funds and the support of or opposition to candidates or measures. The officers of a political party are considered the directors of any political party committee of that party, unless otherwise provided in the party's bylaws.

## Committee Identification Number

The number assigned to Oregon committees registered with the Elections Division.

## Contribution

A contribution includes:

the payment, loan, gift, forgiving of indebtedness, or furnishing without equivalent compensation or consideration, of money, services other than personal services for which no compensation is asked or given, supplies, equipment, or any other thing of value:

- for the purpose of influencing an election for public office or an election on a measure, or of reducing the debt of a candidate for nomination or election to public office or the debt of a political committee, or
- to or on behalf of a candidate, political committee, or measure.

If a contribution is made for compensation or consideration of less than equivalent value, only the excess value of it is a contribution.

## Controlled Committee

A political action committee that, in connection with the making of contributions or expenditures:

- is controlled directly or indirectly by a candidate or another controlled committee;

or

- acts jointly with a candidate or another controlled committee.

A candidate controls a political action committee if:

- the candidate, the candidate's agent, a member of the candidate's immediate family, or any other political action committee that the candidate controls has a significant influence on the actions or decisions of the political action committee;

or

- the candidate's committee and the political action committee both have the candidate or a member of the candidate's immediate family as a treasurer or director.

## Corporation

Includes for-profit, nonprofit, and professional corporations.

## County Offices

The elected public offices of a county. County offices typically include County Commissioners, County Assessor, County Clerk, County Sheriff, and County Treasurer.

The offices may vary depending upon the county's charter and ordinances. Contact the county elections filing officer for any questions regarding county offices.

## District Offices

The elected public offices of a special district (such as a school or water district) which may be voted on only by the registered voters of the special district. District offices typically include a board of directors.

The offices may vary depending upon the district's statutory requirements. Contact the county elections filing officer for any questions about district offices.

## Elections Division

The term “Elections Division” refers to the Oregon Secretary of State’s Office, Elections Division.

## Electoral District

An area within the state, county, city, or district that is designated to be governed or represented by a particular elected public office.

## Elector

A registered voter in the State of Oregon.

## Exempt Loan

Any loan of money made by a financial institution, other than any overdraft made with respect to a checking or savings account, if the loan:

- bears the institution’s usual and customary interest rate for the category of loan involved;
- is made on a basis which assures repayment;
- is evidenced by a written instrument;
- and**
- is subject to a due date or amortization schedule.

## Expenditure

An expenditure includes:

- payment or furnishing of money or furnishing of any other thing of value;
- incurring or repayment of indebtedness or obligation by or on behalf of a candidate, committee or person in consideration for any services, supplies, or equipment;
- any other thing of value performed or furnished for any reason, including support of or opposition to a candidate, committee, or measure;
- reducing the debt of a candidate for nomination or election to public office;
- or**
- contributions made by a candidate or committee to or on behalf of any other candidate or committee.

## Fair Market Value

Fair market value is the dollar amount a consumer would expect to pay for goods or services.

## Federal Offices

President, Vice President, United States Senator, and United States Representative.

## Financial Institution

A financial institution conducting business in Oregon.

## Forgiven Loan

A loan which a lender determines need not be repaid.

## General Election

The first Tuesday after the first Monday in November of each even-numbered year.

## Independent Expenditure Filer

A person, other than a political committee or petition committee that is required to disclose expenditures made independently for a communication in support of or in opposition to a candidate, political party, or measure.

## Initiative Petition

A petition by electors to initiate a measure for approval or rejection.

## In-Kind

A good or service, other than money, having monetary value.

## Initial Assets

Contributions received or expenditures made by a committee prior to establishing the committee.

## Legislative Official

Any member or member-elect of the Legislative Assembly.

## Loan Co-Signer or Guarantor

A person who guarantees a loan of monetary value for a candidate or a committee.

## Local Initiative or Referendum

Any initiative or referendum filed with a county, city, or special district elections office.

## Local Office or Measure

Any office or measure to be voted upon by the registered voters of a county, city, or special district.

## Measure

Includes any of the following submitted to the people for their approval or rejection at an election:

- an Act or part of an Act of the Legislative Assembly;
- a county, city, or special district legislation;
- a proposed law;
- a proposition or question; or
- a proposed revision or amendment to the Oregon Constitution.

## Measure Committee

A political action committee organized exclusively to support or oppose one or more measures certified to a ballot in Oregon.

## Membership Organization

A trade association, cooperative, corporation without capital stock, or a local, national, or international labor organization that:

- is composed of members who have the choice whether to join the organization and some or all members are vested with the power and authority to operate or administer the organization, pursuant to the organization's articles, bylaws, constitution, or other formal organizational documents;
- expressly states the qualifications and requirements for membership in its articles, bylaws, constitution, or other formal organizational documents;
- makes its articles, bylaws, constitution, or other formal organizational documents available to its members upon request;
- expressly solicits persons to become members;
- expressly acknowledges the acceptance of membership, such as by sending a membership

card or including the member's name on a membership newsletter list;

- is not organized primarily for the purpose of influencing the nomination for election, or election, of any individual to public office;

**and**

- is not a political committee.

## Non-Exempt Loan

A loan that is generally from a source other than a financial institution.

## Nonaffiliated Candidate

A candidate filing for a partisan office by Assembly of Electors or Individual Electors and who is not affiliated with any party.

## Nonpartisan Activity

Activity designed to encourage individuals to vote or to register to vote, regardless of party affiliation.

## Nonpartisan Office

An office for which the candidate does not run under the name of any political party. Nonpartisan offices include: Judge (Supreme Court, Court of Appeals, Tax Court, Circuit Court, and County Judge who exercises judicial functions), Commissioner of the Bureau of Labor and Industries, any elected office of a metropolitan service district under ORS Chapter 268, Justice of the Peace, County Clerk, County Assessor, County Treasurer, Sheriff, District Attorney, and any office designated nonpartisan by a home rule charter. Special District offices are also nonpartisan.

## OAR

Oregon Administrative Rules.

## Occupational Information

The nature of an individual's primary job or business and if the individual is employed by another person, the employer's name and city and state.

## ORESTAR

Oregon Elections System for Tracking and Reporting (ORESTAR) is the Elections Division web-based campaign finance reporting system.

## ORS

Oregon Revised Statutes.

### Other Disbursements

Moneys disbursed by the candidate or committee that do not meet the definition of “expenditure.”

### Other Receipts

Moneys received by a candidate or committee that do not meet the definition of “contribution.”

### Partisan Office

An office for which the candidate may be nominated by a major or minor political party, or as a nonaffiliated candidate.

### Person

An individual, corporation, limited liability company, labor organization, association, firm, partnership, joint stock company, club, organization, or other combination of individuals having collective capacity.

### Petition Committee

A petition committee is a committee formed by the chief petitioner(s) of an initiative, referendum, or recall petition during the signature gathering phase.

### Physical Currency

Coins or paper notes, or any combination thereof, that are issued by United States Federal Reserve Banks or by equivalent institutions in another country, or that are recognized as legal tender by any government.

### Political Action Committee

Includes miscellaneous, political party, caucus, recall, and measure committees. This term does not include a candidate committee or a petition committee.

## Political Committee

Defined by statute as a combination of two or more individuals, or a person other than an individual, that has received a contribution or made an expenditure for the purpose of supporting or opposing a candidate, measure, or political party. Expenditure does not include a contribution to a candidate or political committee required to report the contribution or an independent expenditure that is required to be reported. Political committee also includes an individual that solicits and receives a contribution, unless all contributions received by the individual are designated to a committee and forwarded to that committee within seven business days of receipt.

Unless otherwise specified, the term “political committee” refers to all candidate committees, measure committees, political party committees, caucus committees, recall committees, and miscellaneous committees. This term does not include a petition committee.

### Political Party Committee

A political committee organized by a political party which has appropriately filed its organizational documents with the Secretary of State under ORS 248.007 or 248.008. Includes county central committee.

### Primary Election

The third Tuesday in May of each even-numbered year.

### Professional Delivery Service

Includes common carriers such as the United States Postal Service, Federal Express, and UPS. Other businesses that in the course of their work may be responsible for delivering documents, such as accounting or contribution and expenditure transaction preparation services, are not considered professional delivery services.

## Prospective Petition

**Candidate:**

The information and filing forms, except signatures and other identification of petition signers, required to be contained in a completed petition.

**Local (City, County, and District):**

The information and filing forms, except signatures and other identification of petition signers, required to be contained in a completed petition.

**Statewide:**

A prospective initiative, referendum, or recall petition, which has been filed and accepted by the Elections Division's office, but has not received written approval to circulate from the Elections Division.

## Public Office

Any national, state, county, city, or district office or position, except a political party office, filled by an elector.

## Recall Petition

A petition by electors to place a question on a special recall election ballot regarding whether a specified public officer should be removed from office.

## Referendum Petition

A petition by electors to approve or reject legislation adopted by the Oregon Legislature or the governing body of a county, city, or district.

## State Measure

A measure to be voted on by the electors of the entire state.

## State Offices

Governor, Secretary of State, State Treasurer, Attorney General, Commissioner of the Bureau of Labor and Industries, Judge (Supreme Court, Court of Appeals, Tax Court, Circuit Court, and any County Judge who exercises judicial functions), State Senator, State Representative, or District Attorney.

## Transactions

Contributions, expenditures, other receipts and disbursements, and all other committee and independent expenditure filer financial activities that are required to be reported under Oregon campaign finance law.

## Treasurer

A person appointed by a political committee or petition committee to manage and report the contributions and expenditures of the committee.

## Undue Influence

Application of force, violence, restraint, or the threat of it, inflicting injury, damage, harm, loss of employment, or other loss or threat of it, or giving or promising to give money, employment, or other thing of value, done with the intent to induce a person to engage or refrain from engaging in specific kinds of political activity listed in ORS 260.665(2). Depending on the conduct the person applying undue influence intends to induce, a violation of ORS 260.665 is punishable by imposition of a civil penalty or as a class C felony.

## List of Forms

**SEL 220**

Statement of Organization for Candidate Committee

**SEL 221**

Statement of Organization for Political Action Committee

**SEL 222**

Statement of Organization for Petition Committee

**PC 3**

Cash Expenditures and Loan Payments

**PC 7**

Certificate of Limited Contributions and Expenditures

**PC 12**

Statement of Corporate Paid-in-Capital

## Oregon Administrative Rules (OAR)

**OAR 165-001-0005 through OAR 165-001-0080**

Administrative rules outlining contested case procedures

**OAR 165-012-0005**

Designating the Campaign Finance Manual and Forms

**OAR 165-012-0050**

Contribution of Polls, Allocation of Polling Expenses

**OAR 165-012-0240**

Administrative Discontinuation of a Political Committee

**OARs 165-012-0505, 165-012-0510, 165-012-0515, 165-012-0520, 165-012-0530**

Covered Organizations

**OAR 165-012-0525**

Campaign Advertising Disclosures

**OAR 165-013-0010**

Penalty Matrix for Other Campaign Finance Violations

# ORESTAR User's Manual: Statement of Organization

*Published by*

Elections Division  
255 Capitol Street NE  
Suite 501  
Salem, OR 97310-0722

 503 986 1518  
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**tty** 1 800 735 2900  
**oregonvotes.org**



2012

Secretary of State

Elections Division

office hours: M-F | 8am – 5pm

For ORESTAR assistance, call the Elections Division or email [orestar-support.sos@state.or.us](mailto:orestar-support.sos@state.or.us).

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# Introduction

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ORS chapter 260, "Campaign Finance Regulation; Election Offenses," requires disclosure of contributions and expenditures related to any candidate, measure, or political party active in any election including initiative, referendum and recall petition drives. The chapter requires that all political committees and petition committees file campaign finance transactions electronically. It also requires that the Secretary of State provide an electronic filing system to committees free of charge to comply with this requirement.

The system developed by the Secretary of State is called Oregon Elections System for Tracking and Reporting, or ORESTAR. It is a secure web-based application that can be accessed from any computer through the Internet.

ORESTAR enables committees to:

- file a Statement of Organization for a new committee electronically
- amend Statement of Organization information electronically
- maintain a master list of contributors and payees in an address book
- enter campaign finance transaction information
- upload transaction and address book information via an XML file
- validate transaction information prior to filing to ensure that all the required information is provided
- file campaign finance transactions electronically
- view exam letters identifying transaction insufficiencies
- edit and file amended transactions
- search for transactions or address book information
- export transaction or address book information into Excel for creating labels, letters or for other analysis
- file a Certificate of Limited Contributions and Expenditures

Each committee has an "account" in ORESTAR and only the candidate, treasurer and other authorized users designated by the candidate or treasurer have access to the account. All transactions entered into a committee's account remain private until they are filed with the Elections Division. Once transactions are filed, the information immediately becomes available to the public in an online searchable database.

The system will calculate contributor and payee aggregates, determine when a transaction should be included in the 'miscellaneous under \$100' category and file it as such, calculate the committee's Account Summary totals, and calculate the due date for filing each transaction.

ORESTAR also allows a major political party or nonpartisan candidate for state office, or a candidate for US Senator or Representative in Congress, to file a Declaration of Candidacy and pay the fee electronically. Candidacy filings that are submitted electronically can also be amended and withdrawn electronically, if necessary.

This manual guides users through the processes of filing and managing a committee's Statement of Organization. There are separate user's manuals for filing campaign finance transactions and for filing a fee-based Declaration of Candidacy using ORESTAR. Users may find it useful to review these manuals online while logged in to ORESTAR.

ORESTAR User's Manuals should be used in conjunction with the Campaign Finance Manual and the Candidate Manual, which are also published by the Elections Division. These manuals contain information about the legal requirements of campaign finance disclosure and candidate filing. All Elections Division publications and forms are available at [www.oregonvotes.org](http://www.oregonvotes.org).

Users can access ORESTAR at [www.oregonvotes.org](http://www.oregonvotes.org). This site should be bookmarked for repeated use.



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# System Information

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## System Requirements

ORESTAR can be run on any computer with Internet access. There is no need to install software on the computer. The web pages are best viewed using Microsoft Internet Explorer 7.x, Mozilla Firefox 3.x or Safari 3.x as the web browser. Other browsers may work as well, but if problems are experienced, switch to one of these.

ORESTAR requires that JavaScript be enabled. This is the standard setting for most browsers.

To enable JavaScript in Microsoft Internet Explorer, proceed with the following:

- 1 Open the browser.
- 2 Select Tools, then Internet Options from the browser menu.
- 3 Click on the Security tab.
- 4 Click on the Internet icon.
- 5 If the security level is set to Medium or lower, click Cancel and no further changes are needed. If the security level is Custom or High, click the Custom Level button, navigate to Scripting, Active Scripting and click the radio button next to Enable. Click OK on the Security Settings panel and then click OK on the Internet Options panel.

Cookies must be enabled to log in to ORESTAR. Again, this is the standard setting for most browsers. Cookies allow ORESTAR to recognize the user and customize the web pages for that user (e.g., only display committees associated with the user in the Private Workshop).

To enable Cookies in Microsoft Internet Explorer, proceed with the following:

- 1 Open the browser.
- 2 Select Tools, Internet Options from the menu.
- 3 Click on the Privacy tab.
- 4 If the security level is set to Medium or lower, click Cancel and no further changes are needed. If the security level is higher than Medium, click the Sites button and follow the directions on the Per Site Privacy Actions panel to allow cookies from portal.sos.state.or.us and secure.sos.state.or.us. Click OK on Per Site Privacy Actions panel and then click OK on the Internet Options panel.

### ***note***

The Secretary of State's office is not advocating that a particular security level is appropriate for each user's Internet browsing needs. The instructions above merely explain how to make the settings that will allow the ORESTAR application to run on an Internet browser.

### **Internet Connection Speed**

The Elections Division recommends a high-speed connection like DSL, Cable, High-Speed Wireless or Satellite. While ORESTAR will run over a dial-up connection, the system may not provide what some users would consider acceptable performance at that speed. If you are a user with a dial-up connection who is experiencing slow speeds, we recommend upgrading to high speed or use high speed through a local library or other establishments that offer such service.

### **Security**

Security for all interactive Secretary of State web applications is managed by a single Secure Access System. This is the system that will store user names and passwords. It also has functions that allow a user to receive a new password if the user's current password is forgotten, update a user's account profile, change passwords, and request additional access rights. Further information about the Secure Access System is documented in the Privacy Policy and FAQs. These documents can be accessed by clicking on the ORESTAR login link at [www.oregonvotes.org](http://www.oregonvotes.org).

ORESTAR uses industry standard Secure Socket Layer encryption to protect a user's information as it travels across the Internet. As part of this protocol, depending on how the browser is configured, a user may be prompted to accept an SSL certificate. It is necessary to accept the certificate in order to access ORESTAR.

#### ***note***

It is standard practice for secure web applications to limit the amount of time a user can remain logged in with no activity. For the ORESTAR system, the time limit is 35 minutes. It is recommended that a user save work frequently. If work is not saved and the ORESTAR connection closes due to inactivity, all unsaved work is lost.

### **Firewalls**

Firewalls are a type of software designed to isolate a computer or a network of computers from other networks, including the Internet. Though firewalls are primarily found in offices, they are quickly making their way into the homes of DSL and cable-modem subscribers. They are a very useful tool to protect data and resources but they may interfere with some interactive applications.

We do not anticipate any problems accessing ORESTAR through a firewall. ORESTAR runs on the standard port for the HTTPS protocol (port 443). If problems occur while trying to access ORESTAR, check with the system's network administrator or with a computer support technician to find out if current firewall settings allow traffic over port 443.

### **System Availability**

ORESTAR is hosted on the Secretary of State's secure application and database servers. The targeted availability for this application is 24 hours a day, seven days a week with the exception of a backup downtime period between 2am and 6am Sunday mornings. However, this is not a guarantee.

Our support staff is available from 8am to 5pm, Monday through Friday. When problems occur at night or on the weekends, they will generally not be resolved until the following business day. There will also be an occasional need for downtime to load system patches or release new versions. To the extent that these events require significant downtime, they will be scheduled and notification will be posted on our website.



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# Creating and Managing a User Account

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This section guides a user through the process of creating a user account and requesting access to an existing committee, if appropriate. It also includes instructions for updating a user account, changing a password or replacing a forgotten password.

**note**

- **Each individual should only register once.**  
Do not create more than one user account, even if you serve in different roles or on multiple committees.
- **Do not create a user account for another person.**
- **Do not log in to another user's account.**

### Who Must Create a User Account

The following individuals must register by creating a user account:

- a candidate and treasurer associated with a committee in ORESTAR (including a committee that is filed using the paper forms and data entered into ORESTAR by the Elections Division)
- a candidate and treasurer preparing to register a new committee electronically in ORESTAR
- a treasurer registering a political action committee or petition committee
- an individual designated as the alternate transaction filer for a committee
- an individual who will perform data entry of campaign finance transactions for a committee
- a vendor who will upload XML files containing campaign finance transactions for a committee
- a candidate preparing to file a Declaration of Candidacy electronically in ORESTAR  
Only candidates for state office, US Senator and Representative in Congress in a primary election may use ORESTAR to file for candidacy; see the ORESTAR Candidacy Filing manual for more information

A person designated to receive notices sent under ORS chapters 246 to 260 (Correspondence Recipient) or a public user **should not** create a user account in ORESTAR.

## Creating a User Account

### **Remember!**

**A user should create only one user account.** Each individual should only have one user name. The same user name can be used for a person associated with multiple committees.

To register, proceed with the following:

- 1 Go to [www.oregonvotes.org](http://www.oregonvotes.org) in the web browser and click on **Register** under the ORESTAR logo. The Oregon Secretary of State Secure Access System Login page displays.

**Oregon Secretary of State**  
**Kate Brown**

Oregon Secretary of State Secure Access System May 9, 2011 9:36 AM

**Enter your user name and password to login**

**User Name**

**Password**

Welcome to the Oregon Secretary of State Secure Access System. You have been directed here because you are trying to perform functions within the Secretary of State applications that require us to identify and authenticate before allowing you to access data.

The Sign Up Now button on the navigation bar to the left allows new customers to register and get a user name and password.


Returning customers can logon by entering their user name and password above.

There is also a Frequently Asked Questions or FAQ, a Contact Us and our Privacy Policy that provides the details concerning how we will use your personal information.

[Login](#)  
[Sign Up now](#)  
[Forgot Password](#)  
[Forgot User Name](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)

- 2 Click on **Sign Up Now** in the left navigation bar. The User Profile page displays.

**Oregon**  
**Secretary of State**  
**Kate Brown**



Oregon Secretary of State Secure Access System May 9, 2011 9:46 AM

[Login](#)

[Sign Up now](#)

[Forgot Password](#)

[Forgot User Name](#)

[FAQs](#)

[Contact us](#)

[Privacy Policy](#)

**Sign Up Now** Required fields are **BOLD**

**First Name**  MI

**Last Name**

**Address**

**City, State** ,

**Zip**  -

Work Phone  Ext

Home Phone

**E-mail Address**

**User Name**  Minimum of six characters from A-Z and 0-9. No spaces or special characters. Your username is your unique identifier to all Secretary of State applications. Once registered, it cannot be changed.

**Password**   
Case sensitive. Minimum of eight characters with at least one numeric digit.

**Confirm Password**

The following information will help us verify your identity if you call for assistance with your account. We will read the question to you and expect you to respond with the answer entered.

**Select Question**

**Answer**

**Confirm Answer**

- 3 Complete the form. Required fields are **BOLD**.

The user name selected must be at least six characters and should not contain spaces or special characters. **The user name cannot be changed so choose one that is easy to remember.**

The password must be a minimum of eight characters and include at least one numeric digit. The password field is case sensitive so be sure to type in upper and lowercase as desired.

Select a question by clicking on the down arrow and choosing the desired question from the list. Enter the answer to the selected question and confirm the answer by entering it a second time. The question and answer will help the Elections Division identify a user if assistance with the user's account is required.

- 4 Click on **Submit**. The Application Management page displays.

**Oregon Secretary of State Kate Brown**

Welcome johnsmith to Oregon Secretary of State Secure Access System Apr 4, 2011 12:37 PM

**Home**  
[My Profile](#)  
[Change Password](#)  
[Application Mgmt](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)  
[Sign Out](#)

Choose ONE application from Your Selected Applications  
 OR  
 Choose ONE application from Additional Applications.

Then choose "Submit" and you will be asked for additional information regarding the application.  
 Choose "Cancel" to return to the home screen.

**Your Selected Applications**

**Additional Applications**

Central Business Registry  
 ORESTAR (Elections Reporting)  
 Public Records System

- 5 Select ORESTAR (Elections Reporting) in the Additional Applications box and click on **Submit**.
- 6 The Committee Filter page displays.

**Oregon Secretary of State Kate Brown**

Welcome scottbrown to Oregon Secretary of State Secure Access System Apr 4, 2011 2:38 PM

**Home**  
[My Profile](#)  
[Change Password](#)  
[Application Mgmt](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)  
[Sign Out](#)

**Please select from the following filters (if applicable) and then click Submit.**

**Alphabetical by Committee Name**  
 Committee Number, Committee Name

If you are the treasurer or candidate for an existing committee, including a work in progress committee, select your committee & click submit. Otherwise, click submit without making a committee selection & you will be directed to the ORESTAR application.

013202. ZAZ-Committee 07/01/08 11:32:52  
 013204. ZAZ-Committee 07/01/08 13:33:13  
 013206. ZAZ-Committee 07/02/08 08:09:32  
 013207. ZAZ-Committee 07/02/08 09:02:39  
 013208. ZAZ-Committee 07/02/08 11:25:27  
 013209. ZAZ-Committee 07/02/08 13:12:49  
 013217. ZAZ-Committee 07/02/08 15:52:55  
 006462. ZZZ-Committee 05/29/08 15:09:26  
 006471. ZZZ-Committee 06/12/08 09:57:08  
 013196. ZZZ-Committee 07/01/08 09:54:21  
 013197. ZZZ-Committee 07/01/08 10:13:30  
 013198. ZZZ-Committee 07/01/08 10:28:37  
 013199. ZZZ-Committee 07/01/08 10:43:00  
 013713. ZZZ-Friday Committee Five  
 013734. ZZZ-Friday Committee Five  
 013766. ZZZ-Friday Committee Five  
 013781. ZZZ-Friday Committee Five  
 006499. ZZZ-Friday Committee Five  
 013245. ZZZ-Friday Committee Five  
 013256. ZZZ-Friday Committee Five

- 7 A user requesting access to an existing committee in ORESTAR or a work in progress committee should select the committee from the list by clicking on the committee name. Committees appear in alphabetical order by committee name. A candidate committee may appear in alphabetical order by the candidate's last name (e.g., Smith, John) or by the committee's official name (e.g., Friends of John Smith).  
To select multiple committees, hold down the control key on the keyboard while selecting each committee.

**If the committee's original Statement of Organization was not filed electronically using ORESTAR**, you must contact the Elections Division during business hours to establish ORESTAR access to the committee.

**note**

A user who is not associated with an existing or work in progress committee should not make a committee selection. This includes a user who is preparing to file a brand new committee or a candidate preparing to file a Declaration of Candidacy and does not currently have a candidate committee.

- 8 Click on **Submit**.

A user who requested access to a committee must receive approval before gaining access in ORESTAR. See **Granting Access to a Committee's Account** on page 27.

### Filing a Statement of Organization or Declaration of Candidacy

A user who did not make a committee selection and instead is preparing to register a new committee or file a Declaration of Candidacy can immediately log in as described on page 20 to access the Private Workshop. To register a new committee, see page 45. To file for candidacy for a state office, US Senator or Representative in Congress, see the ORESTAR Candidacy Filing manual.

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## Paper Statement of Organization

**If the committee filed its Statement of Organization by paper, you must contact the Elections Division during business hours to establish ORESTAR access to the committee.**

The Elections Division must approve initial access to the candidate or treasurer of a committee whose original Statement of Organization is not filed electronically using ORESTAR. Once the candidate or treasurer is granted access to a committee, the user can approve requests for access to the committee's account by other users. (See **Granting Access to a Committee's Account**, page 27.) The user is sent an email when access is granted.

## Logging In to ORESTAR

To log in to ORESTAR, go to [www.oregonvotes.org](http://www.oregonvotes.org) and click on **Login** under the ORESTAR logo. Enter your user name and password and click on **Login** again. If you have not established a user name and password, select **Sign Up Now** and follow the instructions on page 16.

A successful login from [www.oregonvotes.org](http://www.oregonvotes.org) takes a user to the Private Workshop page in ORESTAR. However, in certain circumstances the user may be taken to the Home page in the user management portion of the system. To access the Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the page.

For more information on the Private Workshop, see the chapter beginning on page 34.

### **note**

If you are having trouble logging in, close all browsers, open a new browser window and try again.

## Requesting Access to a Committee When Logged In to ORESTAR

A user who has completed the registration process and either did not request access to the appropriate committee or wants to request access to an additional committee should proceed as follows:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and **ORESTAR (Elections Reporting)** is in the Applications list.
- 2 Click on **Application Mgmt** in the left navigation bar.
- 3 The ORESTAR (Elections Reporting) application should display in the **Your Selected Applications** box. Click on ORESTAR (Elections Reporting) and then click **Submit**.
- 4 Select the desired committee from the list by clicking on the committee name.
- 5 Click on **Submit**. The Home page redisplay.

### **Remember!**

- ✓ Unless you are the user who registered the committee, an authorized person will need to approve your access to the committee. A candidate, treasurer, candidate/treasurer, or chief petitioner must log in to ORESTAR to assign you a role and approve it.
  - ✓ For more information, see **Granting Access to a Committee's Account** on page 27.
- 6 To return to your Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Updating Profile Information

When any information in the user's account profile changes, the user should update the profile information.

### **Remember!**

- ✓ User name **cannot** be changed.
- ✓ ORESTAR uses the email address on a user's profile to communicate with the user. In addition, system-generated reports (e.g., xml validation reports, transaction filing reports, and exam letters) are also sent to the email addresses on the committee's Statement of Organization.

To update user profile information, proceed as follows:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and ORESTAR (Elections Reporting) is in the Applications list.
- 2 Click on **My Profile** in the left navigation bar.
- 3 Make the desired changes. The form will allow edits on all account information, except the user name and password.
- 4 Click on **Submit** to save the changes.
- 5 The Home page redisplay.

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Changing Passwords

A user may voluntarily change the password at any time. To change the password, proceed with the following:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and ORESTAR (Elections Reporting) is in the Applications list.

- Click on **Change Password** in the left navigation bar. The Change Password page displays.

**Oregon Secretary of State Kate Brown**

Welcome scottbrown to Oregon Secretary of State Secure Access System Apr 4, 2011 4:13 PM

**Change Password for scottbrown**

Old Password

New Password

Confirm Password

Key your new password, confirm it to make sure you keyed it as you intended, and then click Submit.

Case sensitive. Eight characters minimum with at least one numeric digit.

© 2010, State of Oregon, 255 Capitol St. NE, Salem, OR 97301 [qa - ver 1.1]

- Enter your current password as the 'Old Password'. Enter the new password and confirm it by entering it a second time. The password must be a minimum of eight characters and include at least one numeric digit. The password field is case sensitive so be sure to type in upper and lowercase as desired.
- Click on **OK** to save the new password. A message displays indicating that the password change was successful. An email is sent as notification of the password reset.

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Replacing a Forgotten Password

If you have forgotten your password and you have a current email address on your account profile, you can obtain a new password as follows:

- On the Login page, click on **Forgot Password** in the left sidebar.

**Oregon Secretary of State Kate Brown**

Oregon Secretary of State Secure Access System May 9, 2011 9:51 AM

**Forgot Password**

User Name

Enter your username and click Submit. A temporary password will be sent via email.

If you changed your email address or cannot remember your username (remember it's case sensitive) you must contact the appropriate division using the ' Contact Us ' link.

- 2 Enter the user name.
- 3 Click on **Submit**.
- 4 The Login page redisplay with a message notifying you that an email has been sent.

An email is sent to the user with a system-generated password that may be used for logging in to the system. After logging in with the system-generated password, it is recommended that the password be changed to one of the user's choice. See **Changing Passwords** on page 21.

If the password is forgotten and the email address on the user's account profile is **not** current, the user should contact the Elections Division for assistance.

### Retrieving a Forgotten User Name

If you have forgotten your user name and you have a current email address on your account profile, ORESTAR can send you an email listing all unexpired user names associated with that email address.

- 1 On the Login page, click on **Forgot User Name** in the left sidebar.

- 2 Enter the email address that is on your account profile.
- 3 Click on **Submit**.
- 4 The Login page redisplay with a message notifying you that an email containing your user name has been sent.

**note**

If the user name is forgotten but the email address on file is not your current address, the user must contact the Elections Division for assistance.

### Locked Account

After an unspecified number of unsuccessful login attempts, the user's account is locked.

- 1 Go to [www.oregonvotes.org](http://www.oregonvotes.org) and click on **Login** under the ORESTAR logo.

- 2 Click on **Forgot Password** in the left sidebar on the Login page.
- 3 Follow the instructions above for **Replacing a Forgotten Password**, page 22. The account will be unlocked and a new password will be sent to the user.

### **ORESTAR Login Troubleshooting**

If a user has difficulty accessing the Private Workshop page, it may be related to a security feature of ORESTAR, which is designed to protect an unauthorized user from accessing your account. If you are having trouble logging in, close all browser tabs and windows, then open a new browser and try again.

You may also experience trouble logging in if your browser does not accept cookies or if internet security settings are restricting website access. See **System Information**, page 9, for more information.

### **Multiple Registered Users on a Computer**

The committee's approved users may use a single computer to access ORESTAR.

When finished with an ORESTAR session, each user should:

- ✓ Sign out of ORESTAR.
- ✓ Close the web browser.

A different user can now successfully log in to ORESTAR.

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# Managing Access to a Committee's Account

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This section discusses the roles assigned to users in ORESTAR and guides a candidate, treasurer or chief petitioner through the process of granting additional users access to a committee's account, denying a request for access, changing a user's role, and expiring a user's role.

## User Roles

Each user in the system is assigned one of the following roles for each committee the user has access to. A single user can have access to multiple committees and be assigned a different role with each committee. The user's role determines the actions the user is allowed or is required to perform for the committee.

The available roles are:

- **Candidate:** This is the role assigned to a candidate associated with a candidate committee, if the candidate is not also serving as the committee's treasurer.
- **Treasurer:** This is the role assigned to the treasurer of a political action committee, petition committee or candidate committee, if the candidate is not also serving as the committee's treasurer.
- **Candidate/Treasurer:** This is the role assigned to a candidate associated with a candidate committee when the candidate is also serving as the committee's treasurer.
- **Alternate Transaction Filer:** This is the role assigned to an individual authorized to file campaign finance transactions for the committee, in addition to the candidate and treasurer. A user with this role is not allowed to file a Certificate of Limited Contributions and Expenditures or change system preferences.
- **Data Entry:** This is the role assigned to an individual authorized to data enter campaign finance transaction information. A user with this role is not allowed to file transactions.
- **Vendor:** This is the role assigned to an individual authorized to upload an XML file containing campaign finance transaction information. A user with this role is not allowed to add, edit, delete or file transactions.
- **Chief Petitioner:** This is the role assigned to an individual who is the chief petitioner of the initiative, referendum or recall petition sponsored by the petition committee. A chief cannot file campaign finance transactions on behalf of the committee.

A chief petitioner who is also the treasurer is assigned the Treasurer role. A chief petitioner who is also the alternate transaction filer is assigned the Alternate Transaction Filer role.

- **Former Treasurer:** This is the role assigned to a treasurer when an amended Statement of Organization designating a new treasurer is filed with and approved by the Elections Division. The assignment of this role is performed by ORESTAR. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to campaign finance ends the day after the last exam letter response date for transactions the user filed.

## Granting Access to a Committee's Account

An individual with the Candidate, Treasurer, Candidate/Treasurer or Chief Petitioner role for a committee may authorize access to the committee's account by other individuals. It is recommended that access to a committee's account be limited. Access must be granted in the following situations:

- the filing of a new candidate committee with a separate candidate and treasurer (either the candidate or treasurer begins the filing of the committee and the other user must be granted access to the committee to complete the filing)
- the filing of a new petition committee that is started by a chief petitioner (the chief petitioner must grant the treasurer access to the committee to complete the filing)
- a change in committee treasurers (the candidate, chief petitioner or current treasurer must grant access to the new treasurer)
- a committee wishes to have an alternate transaction filer
- a committee wishes to have a data entry person who can add, edit and delete campaign finance transaction information in the committee's account
- a committee needs a vendor who can upload an XML file containing transaction information into the committee's account

### **Remember!**

- ✓ The individual to be granted access must first create a user account, if the user does not already have one. See **Creating a User Account** on page 15.
- ✓ If the user has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.

To grant access to another individual, the candidate, treasurer, candidate/treasurer or chief petitioner should proceed as follows:

- 1 Log in to ORESTAR.
- 2 Click on **User Workflow** in the left navigation bar of the Home page of the Secure Access System. The individual requesting access displays in the User Workflow for ORESTAR (Elections Reporting).

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:52 PM

- Home
- My Profile
- Change Password
- Application Mgmt
- User Workflow**
- User Admin
- FAQs
- Contact us
- Privacy Policy
- Sign Out

**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Doe, Jane</a>	<a href="#">janedoe</a>	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Smith, John</a>	<a href="#">johnsmith</a>	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Click in the checkbox in the Assign Roles column. A page displays with the available roles.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:54 PM

- Home
- My Profile
- Change Password
- Application Mgmt
- User Workflow**
- User Admin
- FAQs
- Contact us
- Privacy Policy
- Sign Out

**ORESTAR (Elections Reporting)**

Select a role and Submit

**Available Roles**

- Data Entry
- Candidate
- Treasurer
- Vendor
- Chief Petitioner
- Alternate Transaction Filer

4 Select the role to be assigned to the individual and click on **Submit**.

- 5 The User Workflow page redisplay, with a message confirming that the role was granted.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:56 PM

Home  
My Profile  
Change Password  
Application Mgmt  
User Workflow  
User Admin  
FAQs  
Contact us  
Privacy Policy  
Sign Out

Role "Alternate Transaction Filer" granted to "janedoe".  
**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Doe, Jane</a>	janedoe	SBCanCmte	Alternate Transaction...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Smith, John</a>	johnsmith	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 6 The Assign Roles checkbox is checked and the role assigned to the individual displays in the Role column.
- 7 Click in the checkbox in the Approve column if the information is correct. A message displays confirming that the approval has been processed and an email has been sent to the individual receiving the new role.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 3:03 PM

Home  
My Profile  
Change Password  
Application Mgmt  
User Workflow  
User Admin  
FAQs  
Contact us  
Privacy Policy  
Sign Out

Role "Alternate Transaction Filer" approved for "janedoe"  
Approval email sent to "stacey.brown@state.or.us".  
**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Smith, John</a>	johnsmith	SBCanCmte		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 8 Click on **User Admin**. The user's name displays in the User Administration page as an approved user.

**Oregon**  
**Secretary of State**  
**Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 3:13 PM

[Home](#)

[My Profile](#)

[Change Password](#)

[Application Mgmt](#)

[User Workflow](#)

[User Admin](#)

[FAQs](#)

[Contact us](#)

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**User Administration**

Click on the unchecked box in the "Expire Role" column if you wish to expire a user's access to an application.  
Click on a name to see the user profile.  
Search is confined to users you have authority to see.  
Use:  
1. Full or part of First Name, Last Name, or User Name  
2. Full or part of Filter Name  
Leave the search field blank to see all names.

User Search based on Name:    Show Default Filters  Show Expired Roles

Name	User Name	Appl	Filter	Role	Expire Role	Effective Date	Expire Date	Status	Locked User
<a href="#">Alexander, Thomas</a>	<a href="#">SBCan01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Candidate/Treasurer	<input type="checkbox"/>	11/09/2010		Approved	
<a href="#">Doe, Jane</a>	<a href="#">janedoe</a>	ORESTAR (Elections Reporting)	SBCanCmte	<a href="#">Alternate Transaction...</a>	<input type="checkbox"/>	04/05/2011		Approved	
<a href="#">Harvey, Gloria</a>	<a href="#">SBTre01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Treasurer	<input checked="" type="checkbox"/>	11/09/2010	03/03/2011	Approved	
<a href="#">Harvey, Gloria</a>	<a href="#">SBTre01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Former Treasurer	<input type="checkbox"/>	03/03/2011		Approved	
<a href="#">Smith, John</a>	<a href="#">johnsmith</a>	ORESTAR (Elections Reporting)	SBCanCmte		<input type="checkbox"/>	04/04/2011		Pending	

Total records displayed = 5

## Denying a Request for Access to a Committee's Account

To deny a user's request for access, open the User Workflow page and click in the checkbox in the Deny column for the user.

## Returning to the Private Workshop

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Changing a User's Role

A Candidate, Treasurer, Candidate/Treasurer or Chief Petitioner can change the role of an approved user associated with the committee. The following are some scenarios in which a user's role should be changed:

- an individual with the Data Entry or Vendor role who becomes the committee's alternate transaction filer should be assigned the Alternate Transaction Filer role.
- an individual with the Candidate/Treasurer role who appoints a separate treasurer should be assigned the Candidate role. See **Removing Candidate as the Treasurer**, page 64, for the process on making this change.

→ an individual with the Candidate role who becomes the committee's treasurer should be assigned the Candidate/Treasurer role. See page 65.

To change a user's role, proceed with the following:

- 1 Log in to ORESTAR.
- 2 Click on **User Admin** in the left navigation bar to enter the user administration portion of the system. Users with access to the committee's account appear on the User Administration page.
- 3 Click on the dropdown arrow in the Status column associated with the user and choose 'Pending' from the list.
- 4 Click on **User Workflow** in the left navigation bar. The user with the 'Pending' status will appear in User Workflow for ORESTAR (Elections Reporting).
- 5 Click in the checkbox that contains a checkmark in the Assign Roles column for the user. A page displays with the available roles.
- 6 Select the new role to be assigned to the user and click on **Submit**.
- 7 The User Workflow page redisplay, with a message confirming that the role was granted.
- 8 The Assign Roles checkbox is checked and the role assigned to the individual displays in the Role column.
- 9 Click in the checkbox in the Approve column if the information is correct. A message displays confirming that the approval has been processed and an email has been sent to the individual receiving the new role.

## Expiring a User's Role

The role of a user who should no longer have access to a committee's account should be expired. To expire an approved user's role, proceed with the following:

- 1 Log in to ORESTAR.
- 2 Click on **User Admin** in the left navigation bar to enter the user administration portion of the system. Users with access to the committee's account appear on the User Administration page.
- 3 Click in the checkbox in the Expire Role column for the user to be expired.

### **note**

If a role is expired in error, click the Expire Role checkmark to remove the check and "unexpire" the role.



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# Private Workshop

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A successful login from [www.oregonvotes.org](http://www.oregonvotes.org) typically takes a user to the Home page of the Secure Access System. To access the Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the page.

**note**

If you are having trouble logging in, close all browsers, open a new browser window and try again.

The Private Workshop is a user's home page in ORESTAR. The Private Workshop is unique to the user.

The screenshot shows the Oregon Secretary of State's Private Workshop interface for user Kate Brown. The header includes the user's name, the date (August 5, 2011), and the version (v3.5.10). The left navigation menu includes options like Private Workshop, Public Search, My Vote, Submit New Filing, User Management, Sign out, Elections Home, Elections History, Initiative, Referendum & Referral, and Publications and Forms. The main content area displays a table of Active Committees with columns for Committee Name, ID, and actions like Amend, Discontinue, and Campaign Finance.

Committee Name	ID			
▶ Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
▶ ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
▶ ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

Legend: ▶ Active, ▶ Pending Approval, ▶ Pending Insufficient, ▶ Discontinued, ▶ Rejected, ▶ Work In Progress

## Navigation and Private Workshop Pages

There is a vertical menu bar in the left frame of ORESTAR. Each menu item that is followed by a right arrow (>>), such as **Private Workshop**, can be expanded to show a submenu of pages. Clicking on **Private Workshop** expands/collapses the Active Committees, Discontinued Committees, Candidacy Filings, and Voters' Pamphlet Filings links.

The following is a description of each menu item:

- **Private Workshop:** Displays a user's personal home page in ORESTAR. The Private Workshop defaults to the Active Committees page which contains a list of active committees the user has access to. Links to the Discontinued Committees page, the Candidacy Filings page, and the Voters' Pamphlet Filings page also display when the user expands the Private Workshop menu.
- **Public Search:** Clicking the Public Search menu opens a list of links to the public search pages:
  - Committee Search pages that allow a user to search for any committee registered with the Secretary of State. Searches can be performed by name information, election information or by measure or petition information;
  - the Campaign Finance Transaction Search page that allows a user to search for campaign finance transactions filed with the Secretary of State by all registered committees;

- the Campaign Finance Certificates Search page that allows a user to search for Certificates of Limited Contributions and Expenditures filed with the Secretary of State by calendar year; and
  - the Candidate Filings Search page that allows a user to search for filings of candidacy for federal or state offices that are filed with the Secretary of State.
- **Submit New Filing:** Clicking the Submit New Filing menu opens links to three filing options:
- File New Political Committee, which links to the Committee Type Information page, the first page when filing a Statement of Organization for a new committee.
  - File Candidacy (federal and state offices), which displays the Candidate Information page, the first page when filing a Declaration of Candidacy. Only candidates for state office, US Senator and Representative in Congress in a primary election may use ORESTAR to file for candidacy. See the ORESTAR Candidacy Filing manual for more information.
  - File Voters' Pamphlet Statement/Argument, which displays the filing type page, the first page when filing a Voters' Pamphlet statement or argument.
- **User Management:** Accesses the user management portion of the system where a user can request access to a committee, update profile information or change passwords. Authorized users can also approve an individual's request for access to a committee's account or change a user's role.
- **Sign Out:** Logs the user out of the system. The user should close the browser after logging out.

## Private Workshop Pages

The Private Workshop pages and a brief description of each follow:

- **Active Committees:** This page displays a list of active committees associated with the logged-in user. The user's role with each committee determines the function buttons that display.
- **Discontinued Committees:** This page displays a list of discontinued committees associated with the logged-in user. Only the **Campaign Finance** button displays.
- **Candidacy Filings:** This page is used by candidates and it displays a list of candidacy filings the logged-in user has filed.
- **Voters' Pamphlet Filings:** This page displays a list of Voters' Pamphlet statements and arguments the logged-in user is creating or has already filed.

## Active Committees Page

Each active committee the user has access to appears in the list and the appropriate function buttons display based on the user's role. The user's role with the committee displays in parentheses after the committee name.

The committees display in ascending order by committee name or by candidate's last name, in the case of a candidate committee. Clicking once on the red arrow will reverse the sort order. Committees can also be sorted in committee ID number order by clicking on the arrow in the ID column.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 5, 2011 (Version : v3.5.10)

Private Workshop

Public Search >>  
My Vote >>  
Submit New Filing >>  
User Management  
Sign out

File New Political Committee

**Active Committees**

Committee Name	ID	Amend	Discontinue	Campaign Finance
Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

**Legend**

Active Pending Approval Pending Insufficient Discontinued Rejected Work In Progress

To view the committee's most recent Statement of Organization filed with the Elections Division, click on the committee name.

### Function Buttons

For each committee listed in a user's Private Workshop up to three function buttons display. A brief description of the action performed by each button follows:

- **Amend:** This button displays for candidates, treasurers and chief petitioners and allows the user to amend Statement of Organization information. For a newly filed committee, the Amend button does not display until the committee's original Statement of Organization is approved by the Elections Division. The Amend button will also display if the original Statement of Organization was filed and determined to be insufficient.
- **Continue with Filing:** This button displays for candidates, treasurers and chief petitioners and allows the user to continue with a work in progress Statement of Organization filing. The Continue with Filing button replaces the Amend button when there is a work in progress Statement of Organization.
- **Discontinue:** This button displays for candidates, treasurers and chief petitioners and allows the user to discontinue a committee. For a newly filed committee, the Discontinue button does not display until the committee's original Statement of Organization is approved by the Elections Division. The Discontinue button will also not display if the committee has a pending Notice of Intent to Discontinue.
- **Delete:** This button displays for candidates, treasurers and chief petitioners and allows the user to delete a work in progress Statement of Organization. The Delete button replaces the Discontinue button when there is a work in progress Statement of Organization.
- **Campaign Finance:** This button displays for candidates, treasurers, alternate transaction filers, data entry persons and vendors. It takes the user to the campaign finance portion of the system where transactions are managed. For a newly filed committee, the Campaign Finance button does not display until the committee's original Statement of Organization is approved by the Elections Division. For a newly appointed treasurer or alternate transaction filer, the Campaign Finance button does not display until an amended Statement of Organization appointing the treasurer or alternate transaction filer is filed with and approved by the Elections Division.

## Legend

Each committee has an arrow to the left of the committee name identifying the committee's status or the status of the committee's most recent Statement of Organization filing. The statuses are:

- **Active (green):** Indicates that the committee is open (not discontinued) and does not have a pending or work in progress Statement of Organization.
- **Pending Approval (yellow):** Indicates that the committee has filed a new or amended Statement of Organization that is pending approval by the Elections Division, or a Discontinuation of a Statement of Organization is pending.
- **Pending Insufficient (orange):** Indicates that the committee has filed a new or amended Statement of Organization that is missing an item of required information or an item of information on the filing is not adequate.
- **Discontinued (black):** Indicates that the committee is discontinued.
- **Rejected (red):** Indicates that the Elections Division has rejected the committee's most recent Statement of Organization filing. If an original Statement of Organization is rejected, it is generally because the committee did not qualify as a political committee under ORS chapter 260. An original Statement of Organization that is rejected cannot be modified. An amended Statement of Organization that is rejected may be subsequently amended.
- **Work in Progress (blue):** Indicates that the committee has started a Statement of Organization filing that has not yet been filed with the Elections Division.

## Discontinued Committees Page

Each discontinued committee the user has access to appears in the list and the **Campaign Finance** button displays. The user's role with the committee displays in parentheses after the committee name.

Committees display in ascending order by committee name or by candidate's last name, in the case of a candidate committee. Clicking once on the red arrow will reverse the sort order. Committees can also be sorted in committee ID number order by clicking on the arrow in the ID column.

## Candidacy Filings Page

This Private Workshop page is used exclusively by major political party or nonpartisan candidates for state office, or candidates for US Senator or Representative in Congress. Each candidacy filing the user has filed appears on the list and the appropriate function buttons display. For more information, see the ORESTAR Candidacy Filing manual.

The function buttons display only if the action can be performed. For example, a candidate filing can be amended until 5pm on the candidate filing deadline. After the filing deadline, the Amend button is no longer available. See the applicable candidate manual for deadlines for filing for candidacy, including amending the filing, or withdrawing a candidate filing.

**Function Buttons**

For each candidacy filing listed in a user's Private Workshop up to three function buttons display. A brief description of the action performed by each button follows:

- **Amend:** This button allows the candidate to amend a candidacy filing.
- **Continue with Filing:** This button allows the candidate to continue with a work in progress candidacy filing. The Continue with Filing button replaces the Amend button when there is a work in progress candidacy filing.
- **Withdraw:** This button allows the candidate to withdraw a candidacy filing.
- **Delete:** This button allows the candidate to delete a work in progress candidacy filing. The Delete button replaces the Withdraw button when there is a work in progress candidacy filing.

**Legend**

Each candidacy filing has an arrow to the left of the election/office information identifying the status of the filing. The statuses are:

- **Pending (yellow):** Indicates that the candidate has filed a Declaration of Candidacy with the Elections Division but a determination has not been made as to whether the candidate is qualified for the office designated on the filing.
- **Qualified (green):** Indicates that the candidate has filed a Declaration of Candidacy and is qualified for the office designated on the filing.
- **Not Qualified (red):** Indicates that the candidate has filed a Declaration of Candidacy and the Elections Division determined that the candidate is not qualified for the office designated on the filing.
- **Work in Progress (blue):** Indicates that the candidate has started a Declaration of Candidacy that has not yet been filed with the Elections Division.
- **Withdrawn (black):** Indicates that the candidate had filed a Declaration of Candidacy, but has chosen to withdraw the filing.

**Voters' Pamphlet Filings Page**

The Voters' Pamphlet Filings page in the user's Private Workshop is used for submitting Candidate Statements, Measure Arguments, Fiscal Impact Statements, Explanatory Statements, Citizens' Review Statements, Precinct Committeeperson Statements (primary election only), and Political Party / Assembly of Electors Statements (general election only). The Voters' Pamphlet Filings page lists each Voters' Pamphlet filing filed and appropriate function buttons display. For more information, see the ORESTAR Voters' Pamphlet Filing manual.

The function buttons display only if the action can be performed. For example, a Voters' Pamphlet filing can be amended until 5pm on the Voters' Pamphlet filing deadline. After the filing deadline, the Amend button is no longer available.

See the Elections Division publications and forms for information about filing fees and deadlines associated with filing Voters' Pamphlet statements or arguments, including amending or withdrawing a Voters' Pamphlet filing.

## Function Buttons

For each Voters' Pamphlet filing listed in a user's Private Workshop, up to three function buttons display. A brief description of the action performed by each button follows:

- **Amend:** This button allows the user to amend a Voters' Pamphlet filing.
- **Continue with Filing:** This button allows the user to continue with a work in progress Voters' Pamphlet filing. The Continue with Filing button replaces the Amend button when there is a work in progress Voters' Pamphlet filing.
- **Withdraw:** This button allows the user to withdraw a Voters' Pamphlet filing.
- **Delete:** This button allows the user to delete a work in progress Voters' Pamphlet filing. The Delete button replaces the Withdraw button when there is a work in progress Voters' Pamphlet filing.

## Legend

Each Voters' Pamphlet filing has an arrow to the left of the election/office information identifying the status of the filing. The statuses are:

- **Pending Approval (yellow):** Used for Voters' Pamphlet petition filings only. Indicates that the user has filed a Voters' Pamphlet filing with the Elections Division but a determination has not been made as to whether the petition is approved to circulate.
- **Approved to Circulate (orange):** Used for Voters' Pamphlet petition filings only. Indicates that the Elections Division has reviewed the petition and approved it to be circulated to gather signatures.
- **Approved (green):** Indicates that the Voters' Pamphlet filing is complete and was filed before the Voters' Pamphlet filing deadline. Note that before a petition filing can be approved, signatures must be verified by the appropriate elections official (i.e., the Secretary of State for candidates for state office, or the appropriate county elections official for candidates for local office). If a county is verifying the signatures, the Voters' Pamphlet filing will not receive a status of Approved until verified signature sheets with sufficient signatures are turned in to the state Elections Division.
- **Work in Progress (blue):** Indicates that the user has started a Voters' Pamphlet filing that has not yet been filed with the Elections Division.
- **Withdrawn (black):** Indicates that the user had filed a Voters' Pamphlet filing, but has chosen to withdraw the filing.

## Election Activity Log

The following information regarding election activity applies to candidate committees and political action committees only. This information is not applicable to chief petitioner committees.

The Election Activity Log displays the history of a committee's election activity. The log for a committee can be accessed from the Private Workshop. In Private Workshop, click on the committee name to view the committee's current Statement of Organization and then click on the **Election Activity Log** link at the bottom of the page. The Election Activity Log page opens.

Oregon Secretary of State

# Kate Brown

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

February 23, 2012 (Version: v3.6.1)

Private Workshop >>	<b>Election Activity Log</b>				
Public Search >>	<b>Election</b>	<b>Active Date</b>	<b>Status</b>	<b>Active Reason</b>	
My Vote	2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>
Election Results	2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>
Submit New Filing >>					
User Management					
Sign out					

The log identifies the election, active date, status and active reason.

### Activating a Committee for a Election

A committee is activated for an election in the following ways:

#### Statement of Organization Filing for a Candidate Committee

When a Statement of Organization for Candidate Committee is filed, the committee is activated for the election in which the candidate will run for office. Additionally, if the Statement of Organization identifies that the candidate is participating in an election other than one in which the candidate's name will appear on the ballot, the committee is activated for that election. The active date is the date the Statement of Organization is filed and the active reason is "Statement of Organization."

#### Statement of Organization Filing for a Political Action Committee

When a Statement of Organization for Political Action Committee is filed and it identifies that the committee will support or oppose a measure or recall at an election, the committee is activated for that election. The active date is the date the Statement of Organization is filed and active reason is "Statement of Organization."

#### User Requested Activation

If a candidate or treasurer inactivates itself and subsequently becomes active, the candidate or treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link. The active date is the date the user activates the committee and the active reason is "User Requested Activation."

**System Activation for a Primary or General Election**

It is assumed that all candidate committees and political action committees are active for each primary and general election (May and November elections held in even-numbered years). An automated process in ORESTAR is run by the Elections Division approximately three months prior to a primary or general election. The process automatically activates any candidate committee or political action committee not already activated. The active date is the date the process is run and the active reason is "System Generated / Primary or General Election." Any new committee filed after the process is run through election day is also automatically activated for that election.

**System Activation Based on Campaign Finance Transactions**

The entry of a transaction associated with an active candidate or measure committee will result in the committee being activated for the applicable election. The active date is the date of the transaction and the active reason is "Contribution to Active Candidate or Measure Committee."

See the Campaign Finance Manual for more information on what it means to be active in an election, including a list of transactions that result in a committee being activated for an election.

**Inactivating a Committee for a Election**

For instructions on how to inactivate a committee, see **Inactivating a Committee for an Election** for a:

Candidate Committee (page 66), or  
Political Action Committee (page 85).



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# Statement of Organization: *Getting Started*

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This section guides a user through the process of registering a new committee. Filing a Statement of Organization, amending a committee's Statement of Organization, and discontinuing a committee using ORESTAR are detailed in subsequent sections specific to committee type: Candidate Committee, Political Action Committee, or Petition Committee.

Candidates and treasurers may file Statements of Organization. Signatures on Statements of Organization filed using ORESTAR are executed electronically. For a candidate committee with a treasurer who is not the candidate, both the candidate and treasurer must electronically sign all Statement of Organization filings. See page 63 for information about filing a Statement of Organization for Candidate Committee that requires multiple signatures. For a petition committee, a chief petitioner may complete the Statement of Organization and submit the filing but the treasurer must also attest to complete the filing. See page 99 for information about filing a Statement of Organization for Petition Committee that requires multiple signatures.

All Statement of Organization filings are reviewed by the Elections Division. The treasurer and candidate, if applicable, will receive notice via email when a filing is approved.

All information on a filed Statement of Organization is public record and viewable by the public on the Internet, except campaign account information and personal information (residence address, home phone number and personal email address) of an individual who has been granted a public disclosure exemption under ORS 192.445.

***Warning!***

When entering data in ORESTAR, do not use your browser's Back button. You may lose the information you have entered.

## Registering a New Committee

Registration of a new committee must be done by the candidate, treasurer or chief petitioner. Only one user associated with a committee starts the registration process for a committee. A user who registers a new committee using ORESTAR is automatically assigned the appropriate role and is approved, and can immediately authorize access to other users, if needed.

To register a new committee, proceed with the following:

- 1 In the left menu bar, click on **Submit New Filing** >> and File New Political Committee. Alternatively, use the File New Political Committee link in the upper right of the Active Committees page.

The screenshot shows the ORESTAR interface for selecting a committee type. The header identifies the Oregon Secretary of State as Kate Brown and provides contact information for the Elections Division. The left sidebar lists various navigation options, with 'Submit New Filing' expanded to show 'File New Political Committee'. The main content area is titled 'Select Type of Committee' and 'Committee Type Information'. It includes a 'Next' button and three radio button options for committee types: 'Candidate Committee', 'Petition Committee', and 'Political Action Committee'. Each option includes a brief description and radio buttons to select the user's role: 'Candidate', 'Treasurer', or 'Both Candidate & Treasurer' for the Candidate Committee; 'Chief Petitioner', 'Treasurer', or 'Both Chief Petitioner & Treasurer' for the Petition Committee; and 'Both Candidate & Treasurer' for the Political Action Committee.

- 2 Select the type of committee to be created. If Candidate Committee or Petition Committee is selected, identify the appropriate role.

For a **Candidate Committee**, select:

- Candidate, if the user registering the committee is the candidate and is appointing a treasurer.
- Treasurer, if the user registering the committee is the appointed treasurer for the committee.
- Both Candidate & Treasurer, if the user registering the committee is the candidate and is also serving as the committee's treasurer.

For a **Petition Committee**, select:

- Chief Petitioner, if the user registering the committee is a chief petitioner and is appointing a treasurer.
- Treasurer, if the user registering the committee is the appointed treasurer for the committee.

- Both Chief Petitioner & Treasurer, if the user registering the committee is a chief petitioner and is also serving as the committee's treasurer.
- 3 Click on **Next**. For candidate committees, continue on page 48. For political action committees, continue on page 70. For petition committees, continue on page 90.

---

# Candidate Committee

---

## Entering a Statement of Organization

Complete the steps for selecting the committee type “Candidate Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Candidate Committee** (form SEL 220), which includes **Campaign Account Information** (form SEL 223).

### Remember!

A candidate can have only one candidate committee. Amend your existing candidate committee information if the candidate runs for another office.

### Data Entry Instructions

Use the tab key on the keyboard to move between fields on a single page or click in the field with the mouse pointer. Use the **Back** and **Next** buttons or click on the tabs in the tab bar to navigate between pages.

Two additional function buttons display on all Statement of Organization entry pages:

- **Save as work in progress** allows a user to save an incomplete filing at any time and immediately continue with the filing or return at a later time to complete the filing. A work in progress filing can be accessed at a later time from a user’s Private Workshop by clicking on the **Continue with Filing** button for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

### Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a candidate committee.

The screenshot shows the Oregon Secretary of State's website interface for entering a Statement of Organization for a Candidate Committee. The header includes the name 'Kate Brown' and the date 'August 18, 2011'. The main content area is titled 'Statement of Organization for Candidate Committee' and features a tabbed interface with the following tabs: Committee, Persons, Election, Campaign Account, Multiple Directors, and Other Election Activity. The 'Committee Information' tab is currently selected. Below the tabs, there are three buttons: 'Next', 'Save as work in progress', and 'Submit Filing'. A radio button group allows the user to select the type of filing: 'Original' (selected), 'Amendment', or 'Discontinuation'. The form includes several input fields: 'Name of Committee', 'Committee Address and Campaign Phone' (with sub-fields for 'Street Address', 'City, State, Zip Code', and 'Extension'), and 'Campaign Phone'.

1 Enter the following information about the committee:

→ **Name of Committee:** The official name of the committee.

→ **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.

→ **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons that are associated with the committee, including the candidate, treasurer, committee directors, alternate transaction filer and correspondence recipient.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 18, 2011 (Version : v3.5.11.QA)

Statement of Organization for Candidate Committee

Committee Persons Election Campaign Account Multiple Directors Other Election Activity

Persons Associated with Committee

Back Next Save as work in progress Submit Filing

**Candidate**  
Name: John Smith Edit  
Address:  
Contacts:  
Occupation:

**Treasurer**  
Add Treasurer

**Committee Director**  
Add Committee Director

**Alternate Transaction Filer**  
Add Alternate Transaction Filer

**Correspondence Recipient**  
Add Correspondence Recipient

## Candidate Information

1 If the candidate or candidate/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the candidate. If the treasurer is entering the Statement of Organization, click on **Add Candidate**. The Add/Edit Candidate Information page displays.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 18, 2011 (Version : v3.5.11.QA)

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Private Workshop >>

Public Search >>

My Vote

Submit New Filing >

File New Political Committee

File Candidacy (federal and state offices)

User Management

Sign out

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Elections Home

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**Statement of Organization for Candidate Committee**

**Add/Edit Candidate Information**

**Name**

**Candidate Address**

Street Address:

City, State, Zip Code:    -

**Mailing Address**

Use Candidate Address

Street Address / PO Box:

City, State, Zip Code:    -

**Occupational Information**

Not Employed  Self-Employed

Occupation:

Employer's Name:

Employer's City / State:

**Contact Information**

Work Phone:  Ext:

Home Phone:

Fax:

Email:

This individual is also:

Campaign Account Signer

2 Enter the following information about the candidate. Name, candidate address, mailing address, email address and occupational information are required.

- **Name:** The candidate's name (first, middle, and last) is automatically populated from the user profile if the candidate or candidate/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) fields can be added if desired. If the treasurer is completing the Statement of Organization, enter the candidate's name.
- **Candidate Address:** The address of a residence, office, headquarters or similar location in Oregon where the candidate can conveniently be found. Do not use a post office box number.
- **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the candidate wishes to receive committee correspondence from the Elections Division. Click in the checkbox to use the candidate address as the mailing address for candidate correspondence.

**note**

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address on the user's account profile and to email addresses on the committee's Statement of Organization.

→ **Occupational Information:**

If the candidate is not employed (including retired, student, etc.), select “Not Employed” by clicking in the box.

If the candidate is self-employed, select “Self-Employed” by clicking in the box, and provide the nature of the candidate’s occupation.

If the candidate is employed by another person, provide the candidate’s occupation and employer’s name and address (city and state).

→ **Contact Information:** The work phone, home phone, fax and email address for the candidate. The work number is the number where the candidate can be reached during normal business hours. An email address is required. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate’s user profile, if different.

→ **This individual is also:** A candidate must be a campaign account signer. Click in the Campaign Account Signer checkbox to confirm that the candidate is a signer on the committee’s campaign account.

3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the candidate’s information on an amended Statement of Organization, click on the **Edit** button associated with the candidate.

### ***Treasurer Information***

A candidate committee must have a complete treasurer entry before the Statement of Organization can be successfully submitted.

***note***

If a user with the candidate/treasurer role has successfully entered Candidate Information, the mailing address and contact information will automatically populate in Treasurer Information.

1 If the treasurer or candidate/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the treasurer. If the candidate is entering the Statement of Organization and is appointing a separate treasurer, click on **Add Treasurer**. The Add/Edit Treasurer Information page displays.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 18, 2011 (Version : v3.5.11.QA)

Statement of Organization for Candidate Committee

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File Candidacy (federal and state offices)  
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Sign out

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Publications and Forms

Add/Edit Treasurer Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:   
City, State, Zip Code:   -

Contact Information   
Work Phone:  Ext:   
Home Phone:   
Fax:   
Email:

This individual is also:

Committee Director  
 Campaign Account Signer

2 Enter the following information about the treasurer. Name, mailing address and email address are required.

→ **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile if the treasurer or candidate/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired. If the candidate is completing the Statement of Organization and is appointing a separate treasurer, enter the treasurer's name.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

**note**

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address on the user's account profile and to email addresses on the committee's Statement of Organization.

→ **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the treasurer's user profile, if different.

→ **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes. A treasurer must be a campaign account signer. Click in the Campaign Account Signer checkbox to confirm that the treasurer is a signer on the committee's campaign account.

3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.

4 If the committee has committee directors, click on **Add Committee Director** and the Add/Edit Committee Director Information page displays.

### Committee Director Information

A committee director is, in part, any person who directly and substantially participates in decision-making on behalf of a political committee concerning the solicitation or expenditure of funds. If any individual meets the definition of director, that person must be designated as a director. A candidate committee is not required to have committee directors and the candidate should not be listed as a committee director.

If the treasurer is designated as a committee director (i.e., the Committee Director checkbox on the Add/Edit Treasurer Information page is checked), the treasurer's name, mailing address and contact information are automatically populated in the Committee Director section on the Persons Associated with Committee page. Click on the **Edit** button associated with the individual in the Committee Director section to add the required occupational information.

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Publications and Forms

Add/Edit Committee Director Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:   
  
City, State, Zip Code:   -

Occupational Information  Not Employed  Self-Employed  
Occupation:   
Employer's Name:   
Employer's City / State:

Contact Information  Work Phone:  Ext:

This individual is also:

Alternate Transaction Filer  
 Correspondence Recipient  
 Campaign Account Signer

1 Enter the following information about each committee director. Name, mailing address and occupational information are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The individual's street address or PO Box, city, state and zip code.

→ **Occupational Information:**

If the individual is not employed (including retired, student, etc.), select "Not Employed" by clicking in the box.

If the individual is self-employed, select "Self-Employed" by clicking in the box, and provide the nature of the individual's occupation.

If the individual is employed by another person, provide the individual's occupation and employer's name and address (city and state).

- **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

If the committee has another director, click on **Add Committee Director**.

To make further edits on an original filing or to update a committee director's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate committee director.

To remove a committee director on an amended Statement of Organization, click on the **Remove** button associated with the appropriate committee director.

- 3 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

#### ***Alternate Transaction Filer Information***

The alternate transaction filer is a person, in addition to the candidate and treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the candidate or treasurer as the alternate transaction filer.

If a committee director is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Committee Director Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

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User Management  
Sign out

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Publications and Forms

**Add/Edit Alternate Transaction Filer Information**

Cancel Save

**Name**  Prefix  First  MI  Last  Suffix  Title

**Mailing Address**

Street Address / PO Box:

City, State, Zip Code:    -

**Contact Information**

Work Phone:  Ext:

Email:

This individual is also:

Committee Director  
 Correspondence Recipient  
 Campaign Account Signer

- Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.
- Click on **Save** to save the information entered and return to the Persons Associated with Committee page.
 

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.
- If the committee wishes to designate a correspondence recipient, click on **Add Correspondence Recipient** and the Add/Edit Correspondence Recipient Information page displays.

### **Correspondence Recipient Information**

The correspondence recipient is a person, in addition to the candidate or treasurer, designated to receive all notices sent by the Elections Division under ORS chapters 246 to 260. A committee may have only one correspondence recipient. Do not designate the candidate or treasurer as the correspondence recipient.

If a committee director or the alternate transaction filer is designated as the correspondence recipient (i.e., the Correspondence Recipient checkbox on the Add/Edit Committee Director Information page or the Add/Edit Alternate Transaction Filer Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Correspondence Recipient section. Click on the **Edit** button to add the required email address, if necessary.

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Statement of Organization for Candidate Committee

Add/Edit Correspondence Recipient Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:

City, State, Zip Code:    -

Contact Information   
Work Phone:  Ext:   
Email:

This individual is also:

Committee Director  
 Alternate Transaction Filer  
 Campaign Account Signer

1 Enter the following information about the correspondence recipient. Name, mailing address and email address are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the individual wishes to receive committee correspondence from the Elections Division.

**note**

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address provided on the Statement of Organization. A correspondence recipient should not create a user account.

→ **Contact Information:** The work phone is the number where the correspondence recipient can be reached during normal business hours. The email address is where the individual wishes to receive committee correspondence from the Elections Division.

→ **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the correspondence recipient's information on an amended Statement of Organization, click on the **Edit** button associated with the correspondence recipient.

To remove the correspondence recipient on an amended Statement of Organization, click on the **Remove** button associated with the correspondence recipient.

- 3 Click on **Next**. The Election Information page displays.

## Election Tab

- Enter the following information about the next election in which the candidate's name is expected to appear on the ballot. The fields are completed using drop-down menus. To complete each field, click on the down arrow and choose the appropriate value from the list.
  - **Year:** Select the year the candidate intends to run for office.
  - **Type of Election:** Select the election the candidate intends to run for office.
  - **Office:** Select the office the candidate intends to run for. If the office cannot be found on the list, enter the complete name of the office, including district, position, county or city, and party affiliation for a partisan office, in the field directly following party affiliation. If the specific office the candidate will run for is not known at the time of filing the Statement of Organization, enter "Office Unknown."
  - **District, Position, County or City:** Select the district, position, county or city of the office the candidate intends to run for.
  - **Party Affiliation:** Select the candidate's party affiliation if the candidate is running for a partisan office. 'Nonpartisan' will automatically populate if the office selected is nonpartisan.
- Click on **Next**. The Campaign Account Information page displays.

## Campaign Account Tab

The screenshot shows the Oregon Secretary of State's website interface. At the top, it displays "Oregon Secretary of State Kate Brown" and "Elections Division" contact information. The main heading is "Statement of Organization for Candidate Committee". Below this, there are tabs for "Committee", "Persons", "Election", "Campaign Account", "Multiple Directors", and "Other Election Activity". The "Campaign Account" tab is active, showing "Campaign Account Information". The form includes fields for "Name of Oregon Financial Institution", "Account Number", "Name of Account", and "Name of Account Holder". Below these is a section titled "List the names of persons with signature authority for campaign account" with a table for entering names and a button for "Additional persons with signature authority".

1 Enter the following information about the committee's campaign account:

→ **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.

→ **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

→ **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**

→ **Name of Account Holder:** The name of the account holder. For a candidate committee, the account holder must include the candidate or the name of the candidate committee. If the candidate is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. First and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired. The candidate and treasurer must be signers on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

2 Click on **Next**. The Multiple Director Information page displays.

## Multiple Directors Tab

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Statement of Organization for Candidate Committee

Committee Persons Election Campaign Account **Multiple Directors** Other Election Activity

Multiple Director Information

Back Next Save as work in progress Submit Filing

Committee ORESTAR User's Manual Committee

Enter the following information when two or more Directors are Directors of another Political Committee:

**Director/Committee**

Identify Committee

By Committee ID:  Find

By Committee Name:  Find

Found Committee Names:

Committee Selected

Name:

Street Address:

City, State, Zip Code:  Oregon  -

Select directors who are also directors of the committee identified above.

Remove this set of Director/Committee Information

If a candidate committee does not have committee directors or has only one committee director, skip this page. If two or more committee directors are also directors of another political committee, identify the other committee and the directors serving on both committees.

- 1 To identify the other committee, enter the committee's identification number in the By Committee ID field or enter any portion of the committee's name in the By Committee Name field and click on the corresponding Find button.
- 2 Select the committee by clicking on the down arrow and choosing the appropriate value from the Found Committee Names list. The committee's name and address display in the Committee Selected section of the page.
- 3 Select the committee directors who are also directors of the committee selected by clicking in the appropriate checkboxes.

If there are more than three sets of multiple director information, click on the **Additional Multiple Directors** button and more fields become available.

To remove a set of multiple director information on an amended Statement of Organization, click in the appropriate "Remove this set of Director/Committee Information" checkbox.

- 4 Click on **Next**. The Other Election Activity page displays.

## Other Election Activity Tab

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Statement of Organization for Candidate Committee

Committee
Persons
Election
Campaign Account
Multiple Directors
Other Election Activity

Other Election Activity ⓘ

Back
Save as work in progress
Submit Filing

Committee : ORESTAR User's Manual Committee

**Election**

Year  Election Type

The committee supports or opposes multiple candidates and measures

The committee supports or opposes specific measures or recalls, identify the measures or recalls

Remove all election participation information.

**Measure**

Select Measure by Number

Support or Oppose

**Measure**

Select Measure by Number

Support or Oppose

**Measure**

Select Measure by Number

Support or Oppose

Additional Measures

**Recall**

Candidate  First Name :  Last Name :

Office of Recall Candidate

District/Position/County

Support or Oppose

**Recall**

Candidate  First Name :  Last Name :

Office of Recall Candidate

District/Position/County

Support or Oppose

**Recall**

Candidate  First Name :  Last Name :

Office of Recall Candidate

District/Position/County

Support or Oppose

Additional Recall Candidates

The Other Election Activity page is used to identify an election that a candidate committee will participate in, **other than** an election where the candidate's name appears on the ballot.

- 1 Identify the election in which the committee will participate.

→ **Year:** Select the year of the election by clicking on the down arrow and choosing the appropriate value from the list.

- **Election Type:** Select the election by clicking on the down arrow and choosing the appropriate value from the list.
  - **Nature of Activity:** Identify the nature of the committee's participation. Select either "The committee supports or opposes multiple candidates and measures" or "The committee supports or opposes specific measures or recalls" by clicking in the appropriate checkbox.
- 2 If the committee supports or opposes specific measures, identify the measures.
- **Measure by Number:** Select the number assigned to the measure supported or opposed by clicking on the down arrow and choosing the appropriate value from the list.
  - **Support or Oppose:** Indicate the committee's position on the measure by clicking on the down arrow and selecting Support or Oppose from the list.
- 3 If the committee supports or opposes specific recalls, identify the recalls.
- **Candidate First and Last Name:** Enter the recall candidate's first and last name.
  - **Office of Recall Candidate:** Select the office currently held by the candidate subject to the recall by clicking on the down arrow and choosing the appropriate value from the list.
  - **District/Position/County:** Select the district, position, county or city of the office the candidate currently holds by clicking on the down arrow and choosing the appropriate value from the list.
  - **Support or Oppose:** Indicate the committee's position on the recall by clicking on the down arrow and selecting Support or Oppose from the list. Support means the committee supports recalling the candidate and Oppose means the committee opposes recalling the candidate.

**note**

To remove other election activity on an amended Statement of Organization, click in the "Remove all election participation information" checkbox.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.

- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link.  
To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

If the committee has a separate candidate and treasurer, both individuals must electronically sign the Statement of Organization.

### **note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

## Filing a Statement of Organization that Requires Multiple Signatures

The following describes the process for filing a Statement of Organization for a new committee when multiple signatures are required. The candidate and the treasurer (if different) must both attest to the Statement of Organization filing.

- 1 Person A completes the Statement of Organization for the committee, including attesting to the filing. The Statement of Organization is assigned the Work In Progress status. **Person A can be either the candidate or treasurer.**
- 2 Person B creates a user account, if one does not already exist. See **Creating a User Account** on page 15.

- 3 Person B requests access to the work in progress committee started by Person A. See **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 4 Person A assigns the appropriate role to Person B and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27.
- 5 Person B accesses the Private Workshop page and clicks on the **Continue with Filing** button associated with the committee and then clicks on the **File** button to attest to the Statement of Organization filing.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The candidate or current treasurer assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.
- 3 The new treasurer, along with the candidate, files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the candidate or current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Removing Candidate as the Treasurer

If a candidate is currently serving as the treasurer, but now wants to appoint someone else as treasurer, follow the general steps outlined on page 64 for changing treasurers.

- 1 The new treasurer creates an ORESTAR user account (page 15), if one does not already exist.
- 2 The new treasurer requests access to the committee. See **Requesting Access to a Committee When Logged In to ORESTAR** on page 20 for more information.

- 3 The candidate logs in, enters **User Management** and assigns the role of Treasurer and approves it. The Statement of Organization now needs to be **amended and filed**, designating a new treasurer.
- 4 The new treasurer logs in to **Amend** the Statement of Organization. The new treasurer's name will automatically populate. On the Persons tab, click the **Edit** button for the treasurer and add the required mailing address and email address for the treasurer. Click the "Campaign Account Signer" checkbox to confirm that the treasurer is a signer on the committee's campaign account.  
**note**  
If the candidate logs in to amend, the treasurer's name will not be populated and will need to be entered, along with the treasurer's contact information.
- 5 Check **Submit Filing**. At Attestation, click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.  
**Remember!**  
The treasurer and the candidate must each attest before the filing is complete.
- 6 Once the amended Statement of Organization is approved, the candidate's role as Candidate/Treasurer will be expired by the system, and the candidate receives the role of Candidate.

### Adding the Candidate as Treasurer

If the candidate wants to start serving the committee as both the candidate and the treasurer, and a treasurer already exists:

- 1 The candidate logs in.
- 2 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 3 Select the Persons tab on the Statement of Organization to access the Persons Associated with Committee information page.
- 4 Click the **Remove** button to the right of the existing Treasurer. Confirm that you want to delete the Treasurer.
- 5 Click on the **Edit** button for the candidate.
- 6 Check the box indicating that,  
This individual is also: Treasurer
- 7 Click **Save** and **Submit Filing**. At Attestation, the candidate clicks on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

### Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.

- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the committee has a separate candidate and treasurer, both persons must attest. The second person attests by clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Inactivating a Committee for an Election

For a primary or general election, it is assumed that all committees are active. Approximately three months prior to a primary or general election, ORESTAR activates any candidate or political action committee not already activated.

If a candidate committee is not active and does not want to be subject to seven-day reporting, the candidate or treasurer can inactivate the committee and “opt out” of the election.

- 1 Click on the committee name on the Private Workshop page. The committee's current Statement of Organization displays.
- 2 Click on the Election Activity Log link at the bottom of the Statement of Organization.

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February 23, 2012 (Version: v3.6.1)

<a href="#">Private Workshop</a> >> <a href="#">Public Search</a> >> <a href="#">My Vote</a> <a href="#">Election Results</a> <a href="#">Submit New Filing</a> >> <a href="#">User Management</a> <a href="#">Sign out</a>	<b>Election Activity Log</b>															
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Election</th> <th style="text-align: left;">Active Date</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">Active Reason</th> <th style="text-align: left;"></th> </tr> </thead> <tbody> <tr> <td>2012 Primary Election</td> <td>02/21/2012</td> <td>Active</td> <td>System Generated / Primary or General Election</td> <td style="text-align: right;"><a href="#">Inactivate</a></td> </tr> <tr> <td>2011 May Election</td> <td>02/01/2011</td> <td>Active</td> <td>Statement of Organization</td> <td style="text-align: right;"><a href="#">Inactivate</a></td> </tr> </tbody> </table>	Election	Active Date	Status	Active Reason		2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>	2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>
Election	Active Date	Status	Active Reason													
2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>												
2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>												

- 3 Click on the Inactivate link associated with the appropriate election.

A committee with an active reason of 'Statement of Organization' or 'Contribution to Active Candidate or Measure Committee' may not be inactivated for that election.

**note**

If a candidate committee inactivates for an election, but subsequently becomes active, the candidate or treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link (see page 40).

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer or candidate must file a **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.

The screenshot shows the 'Private Workshop' interface for the Oregon Secretary of State, Kate Brown. The header includes the Elections Division contact information and the date August 5, 2011. A sidebar on the left contains navigation links such as 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', and 'Sign out'. The main content area is titled 'Private Workshop' and features a 'File New Political Committee' link. Below this is a table of 'Active Committees' with columns for 'Committee Name', 'ID', and action buttons. The table lists three committees: 'Jones, Jane ORESTAR User's Manual Committee (Treasurer)' with ID 15137, 'ORESTAR Petition (Treasurer)' with ID 15138, and 'ORESTAR System PAC (Treasurer)' with ID 15139. Each row has 'Amend' and 'Discontinue' buttons, and the first two rows also have a 'Campaign Finance' button. A legend at the bottom identifies status icons: Active (green triangle), Pending Approval (yellow triangle), Pending Insufficient (orange triangle), Discontinued (black triangle), Rejected (red triangle), and Work In Progress (blue triangle).

To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

The screenshot shows the 'Notice of Intent to Discontinue' form in the ORESTAR system. The header includes the Oregon Secretary of State, Kate Brown, and the Elections Division contact information, dated August 19, 2011. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'Notice of Intent to Discontinue' and specifies 'ORESTAR User's Manual Committee (15137)'. The form contains the following text: 'File Notice of Intent to Discontinue', 'Effective Date: 08/19/2011', and a statement: 'By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.' Below this text is a note: 'If you do not agree to the above statement, click on the Cancel button to stop the filing.' At the bottom of the form are 'File' and 'Cancel' buttons.

- 2 Click **File** to file the Notice of Intent to Discontinue.

- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.

- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.

If the committee has a separate candidate and treasurer, both persons must attest. The second person attests by logging in to ORESTAR, clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.

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# Political Action Committee

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## Entering a Statement of Organization

Complete the steps for selecting the committee type “Political Action Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Political Action Committee** (form SEL 221), which includes **Campaign Account Information** (form SEL 223).

### Data Entry Instructions

Use the tab key on the keyboard to move between fields on a single page or click in the field with the mouse pointer. Use the **Back** and **Next** buttons or click on the tabs in the tab bar to navigate between pages.

Two additional function buttons display on all Statement of Organization entry pages:

- **Save as work in progress** allows a user to save an incomplete filing at any time and immediately continue with the filing or return at a later time to complete the filing. A work in progress filing can be accessed at a later time from a user’s Private Workshop by clicking on the **Continue with Filing** button for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

## Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a political action committee.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Committee Persons PAC Type Measures Recall Campaign Account Multiple Directors

Committee Information

Next Save as work in progress Submit Filing

Original  Amendment  Discontinuation

Name of Committee

Acronym

Committee Address and Campaign Phone

Street Address:

City, State, Zip Code:  Oregon  -

Extension

Campaign Phone:

1 Enter the following information about the committee:

- **Name of Committee:** The official name of the committee.
- **Acronym:** Any abbreviated name or acronym the committee uses to identify itself.
- **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.
- **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons that are associated with the committee, including the treasurer, committee directors, alternate transaction filer and correspondence recipient.

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August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Committee | **Persons** | PAC Type | Measures | Recall | Campaign Account | Multiple Directors

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Persons Associated with Committee

Back Next Save as work in progress Submit Filing

**Treasurer**  
Name: John Smith   
Address:  
Contacts:

**Committee Director**  
Add Committee Director

**Alternate Transaction Filer**  
Add Alternate Transaction Filer

**Correspondence Recipient**  
Add Correspondence Recipient

Click on the **Edit** button associated with the treasurer and the Add/Edit Treasurer Information page displays.

## Treasurer Information

Oregon Secretary of State  
**Kate Brown**

Elections Division  
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503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Private Workshop >>  
Active Committees  
Discontinued Committees  
Candidacy Filings  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

**Add/Edit Treasurer Information**

Cancel Save

Name  Prefix  First  John MI  Last  Smith Suffix  Title

**Mailing Address**  
Street Address / PO Box :   
  
City, State, Zip Code :    -

**Contact Information**  
Work Phone :  Ext :   
Home Phone :   
Fax :   
Email :

This individual is also:  
 Committee Director  
 Campaign Account Signer

- 1 Enter the following information about the treasurer. Name, mailing address and email address are required.
  - **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired.
  - **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

***note***

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address on the user's account profile and to email addresses on the committee's Statement of Organization.

- **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate's user profile, if different.
  - **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes. A treasurer must be a campaign account signer. Click in the "Campaign Account Signer" checkbox to confirm that the treasurer is a signer on the committee's campaign account.
- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.
  - 3 Click on **Add Committee Director** and the Add/Edit Committee Director Information page displays.

### ***Committee Director Information***

A committee director is, in part, any person who directly and substantially participates in decision-making on behalf of a political committee concerning the solicitation or expenditure of funds. If any individual meets the definition of director, that person must be designated as a director.

**A political action committee must have at least one committee director who is someone other than the treasurer.** The treasurer cannot be the sole committee director added on the Persons tab.

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**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Political Action Committee

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Add/Edit Committee Director Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:   
City, State, Zip Code:   -

Occupational Information  Not Employed  Self-Employed  
Occupation:   
Employer's Name:   
Employer's City / State:

Contact Information  Work Phone:  Ext:

This individual is also:  
 Alternate Transaction Filer  
 Correspondence Recipient  
 Campaign Account Signer

1 Enter the following information about each committee director. Name, mailing address and occupational information are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The individual's street address or PO Box, city, state and zip code.

→ **Occupational Information:**

If the individual is not employed (including retired, student, etc.), select "Not Employed" by clicking in the box.

If the individual is self-employed, select "Self-Employed" by clicking in the box, and provide the nature of the individual's occupation.

If the individual is employed by another person, provide the individual's occupation and employer's name and address (city and state).

→ **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.

→ **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

If the committee has another director, click on **Add Committee Director**.

To make further edits on an original filing or to update a committee director's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate committee director.

To remove a committee director on an amended Statement of Organization, click on the **Remove** button associated with the appropriate committee director.

- 3 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

**Alternate Transaction Filer Information**

The alternate transaction filer is a person, in addition to the treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the treasurer as the alternate transaction filer.

If a committee director is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Committee Director Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

- 1 Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

- Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.

- If the committee wants to designate a correspondence recipient, click on **Add Correspondence Recipient** and the Add/Edit Correspondence Recipient Information page displays.

### **Correspondence Recipient Information**

The correspondence recipient is a person, in addition to the treasurer, designated to receive all notices sent by the Elections Division under ORS chapters 246 to 260. Do not designate the treasurer as the correspondence recipient.

If a committee director or the alternate transaction filer is designated as the correspondence recipient (i.e., the Correspondence Recipient checkbox on the Add/Edit Committee Director Information page or the Add/Edit Alternate Transaction Filer Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Correspondence Recipient section. Click on the **Edit** button to add the required email address, if necessary.

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503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Add/Edit Correspondence Recipient Information

Cancel Save

Name Prefix First MI Last Suffix Title

Mailing Address

Street Address / PO Box:

City, State, Zip Code:

Contact Information

Work Phone: Ext:

Email:

This individual is also:

Committee Director

Alternate Transaction Filer

Campaign Account Signer

- Enter the following information about the correspondence recipient. Name, mailing address and email address are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the individual wishes to receive committee correspondence from the Elections Division.

**note**

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address provided on the Statement of Organization. A correspondence recipient should not create a user account.

- **Contact Information:** The work phone is the number where the correspondence recipient can be reached during normal business hours. The email address is where the individual wishes to receive committee correspondence from the Elections Division.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the correspondence recipient's information on an amended Statement of Organization, click on the **Edit** button associated with the correspondence recipient.

To remove the correspondence recipient on an amended Statement of Organization and designate a different person, click on the **Remove** button associated with the alternate transaction filer.

3 Click on **Next**. The PAC Type Information page displays.

**PAC Type Tab**

The screenshot shows the Oregon Secretary of State website for Kate Brown. The page title is "Statement of Organization for Political Action Committee". The navigation tabs include Committee, Persons, PAC Type (selected), Measures, Recall, Campaign Account, and Multiple Directors. The "PAC Type Information" form contains the following fields:

- Buttons: Back, Next, Save as work in progress, Submit Filing
- Type of Political Action Committee (dropdown menu)
- Party Affiliation (dropdown menu)
- Nature of Political Action Committee (text input field)
- Is this committee a controlled committee? (dropdown menu with "Select One" option)
- Controlling Candidates section with three rows, each containing a "Remove" checkbox and a dropdown menu.
- A section for candidates not found in the dropdown, with columns for "First Name" and "Last Name", and three rows with "Remove" checkboxes and text input fields.
- Additional Controlling Candidates (button)

1 Enter the following information about the type and nature of the committee.

→ **Type of Political Action Committee:** Select the type of committee by clicking on the down arrow and choosing the appropriate value from the list. The choices are:

**Caucus:** A committee affiliated with either chamber of the Legislative Assembly.

**Measure:** A committee that exclusively supports or opposes one or more measures on the ballot.

**Miscellaneous:** A committee that supports or opposes specific candidates or a combination of candidates and measures.

**Political Party:** A committee established by a major or minor political party qualified under ORS chapter 248 or a committee established under the party's bylaws (e.g., county central committees).

**Recall:** A committee supporting or opposing the recall of a public official subject to a recall election.

→ **Party Affiliation:** For a political party committee, select the party affiliation by clicking on the down arrow and choosing the appropriate value from the list.

→ **Nature of Political Action Committee:** A description of the general nature of the committee (e.g., to support all candidates and measures advocating health care for all).

→ **Is this committee a controlled committee?:** Answer Yes or No to the question by clicking on the down arrow and select the appropriate value from the list.

A controlled committee is a political committee that, in connection with the making of contributions or expenditures:

- is controlled directly or indirectly by a candidate or a controlled committee,
- or
- acts jointly with a candidate or controlled committee.

A candidate controls a political committee if:

- the candidate, the candidate's agent, a member of the candidate's immediate family or any other political committee that the candidate controls has a significant influence on the actions or decisions of the political committee,
- or
- the candidate's committee and the political committee both have the candidate or a member of the candidate's immediate family as a treasurer or director.

**All caucus committees are controlled committees.**

→ **Controlling Candidate(s):** If the committee is a controlled committee, identify the candidate(s) controlling the committee. Begin typing the candidate's last name in the field. The selection will move to the first candidate in the list whose name matches the typed letters. If the candidate displays on the list, select the name by clicking on it. If the candidate is not found on the list, type the candidate's first and last names in the fields below.

If more than three candidates control the committee, click on the **Additional Controlling Candidates** button and more fields become available.

To remove a controlling candidate on an amended Statement of Organization, click in the appropriate "Remove" checkbox.

- 2 Click on **Next**. The Measures the Committee Supports or Opposes page displays.

### Measures Tab

Oregon Secretary of State  
**Kate Brown**
Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Political Action Committee

Committee
Persons
PAC Type
Measures
Recall
Campaign Account
Multiple Directors

Measures the Committee Supports or Opposes

Back
Next
Save as work in progress
Submit Filing

Committee ORESTAR System PAC

Remove all existing measures.

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

Additional Measures

**If the local measure could not be found enter the information below**

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

Additional Local Measures

- 1 Enter the following information for each measure the committee supports or opposes. A measure committee must always have at least one measure designated.

To complete each field, click on the down arrow and choose the appropriate value from the list.

→ **Year:** Select the year in which the measure appears on the ballot.

→ **Election:** Select the election in which the measure appears on the ballot.

→ **Measure by Number:** Select the number of the measure supported or opposed or click on the **Select Measure by Title** link to select the measure by its ballot title. A measure that has not yet been assigned a measure number should be selected by its ballot title.

→ **Support or Oppose:** Indicate the committee's position on the measure by selecting **Support** or **Oppose** from the list.

If a committee supports or opposes more than three measures, click on the **Additional Measures** button and more fields become available.

To remove a measure on an amended Statement of Organization, click in the appropriate "Remove this measure" checkbox. To remove all measures, click in the "Remove all existing measures" checkbox.

If the local measure the committee is supporting or opposing cannot be found on the list, enter the measure information in the lower portion of the page. Use the following rules to complete the County field:

For a county measure, select the county.

For a city measure, select the county in which the city hall of the city is located.

For a special district measure, select the county in which the administrative office of the district is located.

- 2 Click on **Next**. The Recall Elections the Committee Supports or Opposes page displays.

Recall Tab

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Political Action Committee

Committee ORESTAR System PAC

Please select criteria below to identify the candidate(s) supported/opposed by this committee

Remove all existing measures

**Recall**

Select Year: [Dropdown]  
 Select Election: [Dropdown]  
 Candidate First Name: [Text] Last Name: [Text]  
 Office of Candidate: [Dropdown]  
 District/Position/County: [Dropdown]  
 Support or Oppose: [Select One]  Remove this Recall Candidate

**Recall**

Select Year: [Dropdown]  
 Select Election: [Dropdown]  
 Candidate First Name: [Text] Last Name: [Text]  
 Office of Candidate: [Dropdown]  
 District/Position/County: [Dropdown]  
 Support or Oppose: [Select One]  Remove this Recall Candidate

**Recall**

Select Year: [Dropdown]  
 Select Election: [Dropdown]  
 Candidate First Name: [Text] Last Name: [Text]  
 Office of Candidate: [Dropdown]  
 District/Position/County: [Dropdown]  
 Support or Oppose: [Select One]  Remove this Recall Candidate

Additional Recall Candidates

- 1 Enter the following information about each recall the committee supports or opposes. A recall committee must always have at least one recall designated.
  - **Year:** Select the year in which the recall appears on the ballot by clicking on the down arrow and choosing the appropriate value from the list.
  - **Election:** Select the election in which the recall appears on the ballot by clicking on the down arrow and choosing the appropriate value from the list.
  - **Candidate First and Last Name:** Enter the recall candidate's first and last name.
  - **Office of Candidate:** Select the office currently held by the candidate subject to the recall by clicking on the down arrow and choosing the appropriate value from the list.
  - **District/Position/County:** Select the district, position, county or city of the office the candidate currently holds by clicking on the down arrow and choosing the appropriate value from the list.

→ **Support or Oppose:** Indicate the committee's position on the recall by clicking on the down arrow and selecting Support or Oppose from the list. Support means the committee supports recalling the candidate and Oppose means the committee opposes recalling the candidate.

2 Click on **Next**. The Campaign Account Information page displays.

## Campaign Account Tab

The screenshot shows the Oregon Secretary of State's website interface. At the top, it displays "Oregon Secretary of State Kate Brown" and "Elections Division" contact information. The main content area is titled "Statement of Organization for Political Action Committee" and includes a navigation menu with tabs for "Committee", "Persons", "PAC Type", "Measures", "Recall", "Campaign Account", and "Multiple Directors". The "Campaign Account" tab is active, showing "Campaign Account Information". Below this, there are buttons for "Back", "Next", "Save as work in progress", and "Submit Filing". The form fields include "Committee" (ORESTAR System PAC), "Name of Oregon Financial Institution", "Account Number", "Name of Account", and "Name of Account Holder". There is also a section for "List the names of persons with signature authority for campaign account" with a table for entering names (Prefix, First, MI, Last, Suffix, Title) and an "Additional persons with signature authority" button.

1 Enter the following information about the committee's campaign account:

→ **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.

→ **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

→ **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**

→ **Name of Account Holder:** The name of the account holder. For a political action committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. The treasurer must be a signer on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

- 2 Click on **Next**. The Multiple Director Information page displays.

### Multiple Directors Tab

The screenshot shows the 'Statement of Organization for Political Action Committee' page. The left sidebar contains navigation links such as 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', 'Sign out', 'Elections Home', 'Elections History', 'Initiative, Referendum & Referral', and 'Publications and Forms'. The main content area has a breadcrumb trail: 'Committee > Persons > PAC Type > Measures > Recall > Campaign Account > Multiple Directors'. The 'Multiple Directors' tab is active. Below the breadcrumb trail are buttons for 'Back', 'Save as work in progress', and 'Submit Filing'. The current committee is identified as 'ORESTAR System PAC'. A section titled 'Director/Committee' asks the user to 'Enter the following information when two or more Directors are Directors of another Political Committee:'. It includes an 'Identify Committee' section with 'By Committee ID' and 'By Committee Name' fields, each with a 'Find' button, and a 'Found Committee Names' dropdown menu. Below this is a 'Committee Selected' section with fields for 'Name', 'Street Address', and 'City, State, Zip Code' (with a state dropdown set to 'Oregon'). At the bottom, there is a checkbox to 'Remove this set of Director/Committee Information' and a note to 'Select directors who are also directors of the committee identified above.'

If the committee has only one committee director, skip this page. If two or more committee directors are also directors of another political committee, identify the other committee and the directors serving on both committees.

- 1 To identify the other committee, enter the committee's identification number in the By Committee ID field or enter any portion of the committee's name in the By Committee Name field and click on the corresponding **Find** button.
- 2 Select the committee by clicking on the down arrow and choosing the appropriate value from the Found Committee Names list. The committee's name and address display in the Committee Selected section of the page.
- 3 Select the committee directors who are also directors of the committee selected by clicking in the appropriate checkboxes.

If there are more than three sets of multiple director information, click on the **Additional Multiple Directors** button and more fields become available.

To remove a set of multiple director information on an amended Statement of Organization, click in the appropriate "Remove this set of Director/Committee Information" checkbox.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.

The screenshot shows the 'Attestation' page in the ORESTAR system. The header features the Oregon Secretary of State's name, 'Kate Brown', and the Elections Division's address and phone numbers. A navigation menu on the left includes options like 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', and 'Sign out'. The main content area is titled 'Attestation' and contains two buttons: 'Edit Statement of Organization' and 'Review Statement of Organization'. Below these buttons is a text block for the user to read and agree to, followed by 'File' and 'Cancel' buttons.

- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link. To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

### **note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The current treasurer assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.

- 3 The new treasurer files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Inactivating a Committee for an Election

For a primary or general election, it is assumed that all committees are active. Approximately three months prior to a primary or general election, ORESTAR activates any candidate or political action committee not already activated.

If a political action committee is not active and does not want to be subject to seven-day reporting, the treasurer can inactivate the committee and "opt out" of the election.

- 1 Click on the committee name on the Private Workshop page. The committee's current Statement of Organization displays.

- 2 Click on the Election Activity Log link at the bottom of the Statement of Organization.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

February 23, 2012 (Version: v3.6.1)

Private Workshop >>  
Public Search >>  
My Vote  
Election Results  
Submit New Filing >>  
User Management  
Sign out

**Election Activity Log**

Election	Active Date	Status	Active Reason	Inactivate
2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	Inactivate
2011 May Election	02/01/2011	Active	Statement of Organization	Inactivate

- 3 Click on the Inactivate link associated with the appropriate election.

A committee with an active reason of 'Statement of Organization' or 'Contribution to Active Candidate or Measure Committee' may not be inactivated for that election.

**note**

If a political action committee inactivates for an election, but subsequently becomes active, the treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link (see page 40).

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer must file the **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 5, 2011 (Version : v3.5.10)

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

**Private Workshop**

File New Political Committee

**Active Committees**

Committee Name	ID	Amend	Discontinue	Campaign Finance
Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

**Legend**

Active Pending Approval Pending Insufficient Discontinued Rejected Work In Progress

To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

The screenshot shows the ORESTAR web application interface. At the top, it identifies the Oregon Secretary of State as Kate Brown and provides contact information for the Elections Division. The page title is 'Notice of Intent to Discontinue'. A sidebar on the left contains navigation links such as 'Private Workshop', 'Public Search', and 'My Vote'. The main content area is titled 'File Notice of Intent to Discontinue' and includes an 'Effective Date' of 08/19/2011. A text box contains a warning: 'By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.' Below this text are two buttons: 'File' and 'Cancel'.

- 2 Click **File** to file the Notice of Intent to Discontinue.
- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.

- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.
- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.



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# Petition Committee

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## Entering a Statement of Organization

Complete the steps for selecting the committee type “Petition Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Petition Committee** (form SEL 222), which includes **Campaign Account Information** (form SEL 223).

### Data Entry Instructions

Use the tab key on the keyboard to move between fields on a single page or click in the field with the mouse pointer. Use the **Back** and **Next** buttons or click on the tabs in the tab bar to navigate between pages.

Two additional function buttons display on all Statement of Organization entry pages:

- **Save as work in progress** allows a user to save an incomplete filing at any time and immediately continue with the filing or return at a later time to complete the filing. A work in progress filing can be accessed at a later time from a user’s Private Workshop by clicking on the **Continue with Filing** button for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

### Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a petition committee.

Oregon Secretary of State <b>Kate Brown</b>		Elections Division 255 Capitol St NE, Ste 501, Salem, OR 97310 503.986.1518 or 1.866.ORE.VOTE
		August 19, 2011 (Version : v3.5.11.QA)
<b>Statement of Organization for Petition Committee</b>		
<a href="#">Committee</a> <a href="#">Persons</a> <a href="#">Petition</a> <a href="#">Campaign Account</a>		
<a href="#">Private Workshop</a> >> <a href="#">Public Search</a> >> <a href="#">My Vote</a> <a href="#">Submit New Filing</a> >> <a href="#">User Management</a> <a href="#">Sign out</a>	<b>Committee Information</b>	
	<input type="button" value="Next"/> <input type="button" value="Save as work in progress"/> <input type="button" value="Submit Filing"/>	
	<input checked="" type="radio"/> Original <input type="radio"/> Amendment <input type="radio"/> Discontinuation	
	Name of Committee <input type="text"/> Acronym <input type="text"/>	
	<b>Committee Address and Campaign Phone</b>	
	Street Address : <input type="text"/> <input type="text"/>	
	City, State, Zip Code : <input type="text"/> Oregon <input type="text"/> - <input type="text"/>	
	Extension	
	Campaign Phone : <input type="text"/> <input type="text"/>	

1 Enter the following information about the committee:

→ **Name of Committee:** The official name of the committee.

→ **Acronym:** Any abbreviated name or acronym the committee uses to identify itself.

→ **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.

→ **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons who are associated with the committee, including the treasurer, chief petitioners and alternate transaction filer.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.QA)

Statement of Organization for Petition Committee

Committee **Persons** Petition Campaign Account

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Persons Associated with Committee

Back Next Save as work in progress Submit Filing

**Treasurer**  
Name: John Smith   
Address:  
Contacts:

**Chief Petitioner**  
Add Chief Petitioner

**Alternate Transaction Filer**  
Add Alternate Transaction Filer

### Treasurer Information

- 1 If the treasurer or chief petitioner/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the treasurer. If the chief petitioner is entering the Statement of Organization and is appointing a separate treasurer, click on **Add Treasurer**. The Add/Edit Treasurer Information page displays.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.QA)

Statement of Organization for Petition Committee

Add/Edit Treasurer Information

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

**Mailing Address**  
Street Address / PO Box:   
  
City, State, Zip Code:   -

**Contact Information**  
Work Phone:  Ext:   
Home Phone:   
Fax:   
Email:

This individual is also:  
 Petitioner  
 Campaign Account Signer

- 2 Enter the following information about the treasurer. Name, mailing address and email address are required.
  - **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile if the treasurer or chief petitioner/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired. If the chief petitioner is completing the Statement of Organization and is appointing a separate treasurer, enter the treasurer's name.
  - **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

**note**

Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address on the user's account profile and to email addresses on the committee's Statement of Organization.

- **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate's user profile, if different.
  - **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes.
- 3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.

- 4 If the chief petitioner or chief petitioner/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the chief petitioner. If the treasurer is entering the Statement of Organization, click on **Add Chief Petitioner**. The Add/Edit Chief Petitioner Information page displays.

**Chief Petitioner Information****Remember!**

A recall petition can have only one chief petitioner, but an initiative or referendum petition may have up to three chief petitioners.

The screenshot shows the Oregon Secretary of State's website interface. The header features the name 'Kate Brown' and the Oregon state seal. The main content area is titled 'Statement of Organization for Petition Committee' and 'Add/Edit Chief Petitioner Information'. The form includes a 'Name' section with dropdown for Prefix, input fields for First, MI, Last, Suffix, and Title. The 'Mailing Address' section has input fields for Street Address / PO Box, City, State, and Zip Code. The 'Contact Information' section has input fields for Work Phone and Ext. At the bottom, there are checkboxes for 'Alternate Transaction Filer' and 'Campaign Account Signer'. A sidebar on the left contains navigation links like 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', 'Sign out', 'Elections Home', 'Elections History', 'Initiative, Referendum & Referral', and 'Publications and Forms'.

1 Enter the following information about each chief petitioner. Name and mailing address are required.

- **Name:** The chief petitioner's name (first, middle and last) is automatically populated from the user profile if the chief petitioner or chief petitioner/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) fields can be added if desired. If the treasurer is completing the Statement of Organization, enter the chief petitioner's name.
- **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
- **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

If the initiative or referendum petition sponsored by the committee has another chief petitioner, click on **Add Chief Petitioner**.

To make further edits on an original filing or to update a chief petitioner's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate chief petitioner.

To remove a chief petitioner on an amended Statement of Organization, click on the **Remove** button associated with the appropriate chief petitioner.

2 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

**Alternate Transaction Filer Information**

The alternate transaction filer is a person, in addition to the treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the treasurer as the alternate transaction filer.

If a chief petitioner is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Chief Petitioner Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

- 1 Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.
- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.

- 3 Click on **Next**. The Petition Information page displays.

## Petition Tab

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.0A)

Statement of Organization for Petition Committee

Committee Persons **Petition** Campaign Account

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Back Next Save as work in progress Submit Filing

Type of Petition Committee: [v]

**Petition**

State Petition  
Year: [v]  
Select Petition by Number: [v] or [Select Petition by Title](#)

Local Petition  
Date Petition Filed: [v] ...  
Petition #: [v]  
Title: [v]

**Recall**  
Identify the following information about the public official the committee intends to recall:  
First Name: [v]  
Last Name: [v]  
Office: [v]  
District, Position, County or City: [v]

1 Enter the following information about the petition the committee sponsors.

→ **Type of Petition Committee:** Select the type of petition committee by clicking on the down arrow and choosing the appropriate value from the list. The choices are:

Initiative  
Recall  
Referendum

→ **State/Local Petition:** For a petition committee sponsoring an initiative or referendum petition, select either State Petition or Local Petition by clicking in the appropriate checkbox. If State Petition is selected, continue with step 2. If Local Petition is selected, continue with step 3.

2 Enter the following information if the committee is sponsoring a state initiative or referendum petition.

→ **Year:** Select the year the petition will appear on the ballot, if the petition effort is successful, by clicking on the down arrow and choosing the appropriate value from the list.

→ **Petition by Number:** Select the number assigned to the petition by clicking on the down arrow and choosing the appropriate value from the list or click on the [Select Petition by Title](#) link to select the petition by its subject or ballot title.

3 Enter the following information if the committee is sponsoring a local initiative or referendum petition.

- **Date Petition Filed:** The date the prospective initiative or referendum petition was filed with the local filing officer.
  - **Petition #:** The petition number assigned by the filing officer for the petition.
  - **Title:** The ballot title, or subject if no ballot title, for the petition.
- 4 Enter the following information if the committee is sponsoring a recall petition.
- **Recall Candidate’s Name:** The office holder’s first and last names, office, position number if applicable, and the district, county or city for the individual who the committee intends to recall.
- 5 Click on **Next**. The Campaign Account Information page displays.

### Campaign Account Tab

Enter the following information about the committee’s campaign account:

- **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.
- **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

- **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**
- **Name of Account Holder:** The name of the account holder. For a petition committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If

the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. The treasurer must be a signer on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

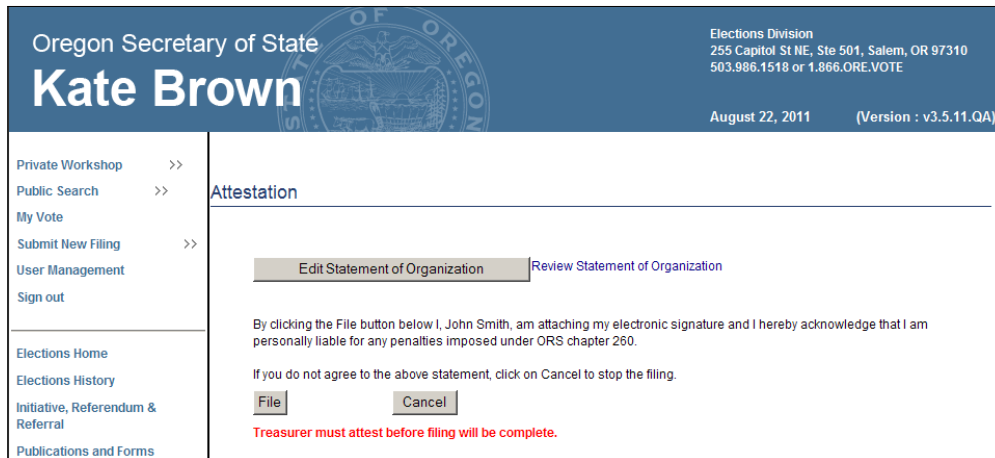
To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.



- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link.

To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

A Statement of Organization that is completed by the chief petitioner also requires the signature of the treasurer. See below for instructions on filing a Statement of Organization that requires multiple signatures.

**note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

### Filing a Statement of Organization that Requires Multiple Signatures

The following describes the process for filing a Statement of Organization for a new committee when multiple signatures are required. Multiple signatures are required only if the chief petitioner completes the Statement of Organization. A Statement of Organization completed by the treasurer can be filed without the signature of a chief petitioner.

- 1 The chief petitioner completes the Statement of Organization for the committee, including attesting to the filing. The Statement of Organization is assigned the Work In Progress status.
- 2 The treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the treasurer already has a user account but has not requested access to the work in progress committee started by the chief petitioner, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.

- 3 The chief petitioner assigns the Treasurer role to the treasurer and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27.
- 4 The treasurer accesses the Private Workshop page and clicks on the **Continue with Filing** button associated with the committee and then clicks on the **File** button to attest to the Statement of Organization filing.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist, and requests access to the committee. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The current treasurer (or chief petitioner, if the chief petitioner has a user account) assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.
- 3 The new treasurer files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the chief petitioner or current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the chief petitioner files the amended Statement of Organization, the treasurer must also attest to complete the filing. The treasurer attests by clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer must file the **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.



To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

Oregon Secretary of State <b>Kate Brown</b>		Elections Division 255 Capitol St NE, Ste 501, Salem, OR 97310 503.986.1518 or 1.866.ORE.VOTE
		August 19, 2011 (Version : v3.5.11.QA)
Private Workshop >> Public Search >> My Vote Submit New Filing >> User Management Sign out	<b>Notice of Intent to Discontinue</b>	
	ORESTAR User's Manual Committee (15137)	
	<b>File Notice of Intent to Discontinue</b>	
	Effective Date: 08/19/2011 By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.	
	If you do not agree to the above statement, click on the Cancel button to stop the filing.	
	<input type="button" value="File"/> <input type="button" value="Cancel"/>	
Elections Home Elections History Initiative, Referendum & Referral		

- 2 Click **File** to file the Notice of Intent to Discontinue.
- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.
 

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.
- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.
- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.

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**ORE STAR** User's Manual: Statement of Organization

2/28/2012

# ORESTAR User's Manual: Transaction Filing

*Published by*

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## Secretary of State

Elections Division Rev. 1/2017

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## Using this Manual


The system developed by the Secretary of State to disclose campaign finance activity is called the *Oregon Elections System for Tracking and Reporting*, or commonly referred to as 'ORESTAR'. This manual is used to provide information on how to file campaign finance transactions electronically in ORESTAR.

Each committee and independent expenditure filer has an "account" in ORESTAR. Only the candidate, treasurer, and other authorized users designated by the candidate or treasurer of a committee, and the individual designated as the independent expenditure filer have access to the account.


Two manuals are available to help a user navigate through ORESTAR committee registration and campaign finance reporting:

- ✓ The **ORESTAR User's Manual: Statement of Organization** explains how to file a Statement of Organization.
- ✓ The **Campaign Finance Manual** includes information about Oregon campaign finance law.

These manuals are available at [www.oregonvotes.gov](http://www.oregonvotes.gov). The Elections Division encourages all persons subject to campaign finance reporting requirements to read these manuals for guidance.

 All campaign finance information filed with the Elections Division since January 1, 2007, is available in the ORESTAR searchable database at [www.oregonvotes.gov](http://www.oregonvotes.gov).

If you have questions about establishing a committee, registering as an independent expenditure filer or filing campaign finance transactions, you may call, email, or visit the Elections Division in-person for assistance. The goal of the Elections Division is to assist everyone disclose campaign finance activity accurately and timely.

 The 2016 **Campaign Finance Manual** and associated forms are adopted by Oregon Administrative Rule No. 165-012-0005.

## Icons

The following icons are used in this manual to emphasize information:



### alert icon

indicates alert; warning; attention needed



### deadline icon

indicates a deadline



### example icon

indicates a detailed example of a concept, process or form



### info icon

indicates additional information



### Search icon

indicates information located elsewhere



### Form icon

indicates a reference to a form

## Assistance


If you have questions about the material covered in this manual or need further assistance, please contact:

Elections Division  
255 Capitol St NE Suite 501  
Salem OR 97310

 **503 986 1518**  
**fax 503 373 7414**

 [orestar-support.sos@state.or.us](mailto:orestar-support.sos@state.or.us)

 [www.oregonvotes.gov](http://www.oregonvotes.gov)

 **1 866 673 VOTE/673 8683**  
se habla español

**tty 1 800 735 2900**  
for the hearing impaired

# Getting Started

## Overview of ORESTAR

---

ORS chapter 260, "Campaign Finance Regulation; Election Offenses," requires disclosure of contributions and expenditures related to any candidate, measure, or political party active in any election including initiative, referendum and recall petition drives. The chapter requires all political committees, petition committees, and independent expenditure filers to file campaign finance transactions electronically. It also requires that the Secretary of State provide an electronic filing system free of charge to comply with this requirement.

The system developed by the Secretary of State is called *Oregon Elections System for Tracking and Reporting*, or ORESTAR. It is a secure web-based application that can be accessed from most computers with an internet connection.

ORESTAR enables committees and independent expenditure filers to:

- file a Statement of Organization for a new committee electronically
- register as an Independent Expenditure Filer
- amend Statement of Organization information electronically
- maintain a master list of contributors and payees in an address book
- enter campaign finance transaction information
- upload transaction and address book information via an XML file
- validate transaction information prior to filing to ensure that all the required information is provided
- file campaign finance transactions electronically
- view exam letters identifying transaction insufficiencies
- edit and file amended transactions
- search for transactions or address book information
- export transaction or address book information into Excel for creating labels, letters or for other analysis
- file a Certificate of Limited Contributions and Expenditures

All transactions entered into a committee's account remain private until they are filed with the Elections Division. Once transactions are filed, the information immediately becomes available to the public in an online searchable database.

The system will calculate contributor and payee totals (also referred to as "aggregates"), determine when a transaction should be included in the 'miscellaneous \$100 and under' category and file it as such, calculate the committee's or independent expenditure filer's Account Summary totals, and calculate the due date for filing each transaction.

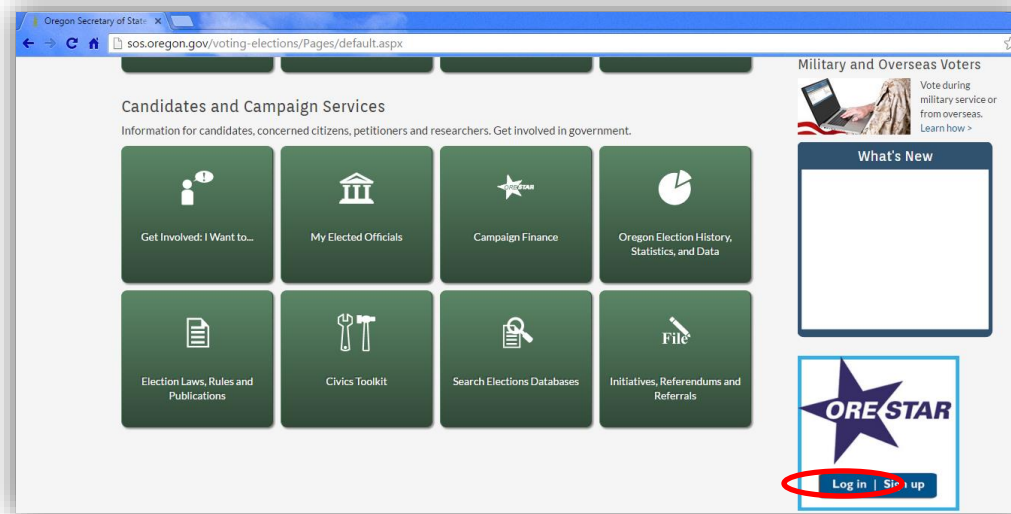
ORESTAR also allows a major political party or nonpartisan candidate for state office, or a candidate for US Senator or Representative in Congress, to file a Declaration of Candidacy and pay the fee electronically. Candidacy filings that are submitted electronically can also be amended and withdrawn electronically, if necessary.

In Oregon, the State Elections Division is responsible for producing the State Voters' Pamphlet. Statements and arguments to be included in the voters' pamphlet must be submitted electronically using ORESTAR. Candidate statements, measure arguments and political party or assembly of elector statements can be filed by fee or petition. Fee filings require payment online at the time of submitting the filing. Petition filings must be approved by the Elections Division before gathering signatures. For more information on who can file with the State Elections Division, refer to the [Voters' Pamphlet Manual](#).

ORESTAR User's Manuals should be used in conjunction with the Campaign Finance Manual and the Candidate Manual, which are also published by the Elections Division. These manuals contain information about the legal requirements of campaign finance disclosure and candidate filing. All Elections Division publications and forms are available at [www.oregonvotes.gov](http://www.oregonvotes.gov).

Users can access ORESTAR at [www.oregonvotes.gov](http://www.oregonvotes.gov). This site should be bookmarked for repeated use.

## Logging into ORESTAR



To log into ORESTAR go to [www.oregonvotes.gov](http://www.oregonvotes.gov) and click on **Log in** under the ORESTAR logo.

Enter your user name and password. Click on **Login** again.

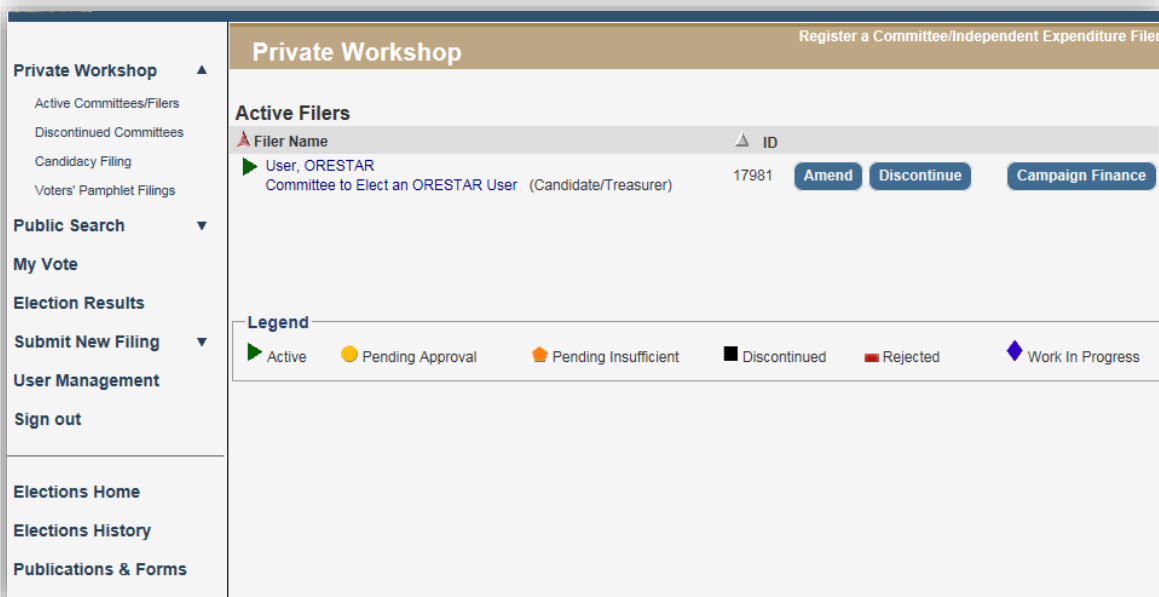
\*If you do not have a user name, select **Sign Up now** and follow the instructions for creating a user account in the *ORESTAR User's Manual: Statement of Organization*.



**!** If the application management page appears, click on **ORESTAR (Elections Reporting)** under the *Applications* heading as shown below:



When ORESTAR opens, the **Private Workshop** page displays the active filers authorized to your account. In the left navigation menu, clicking on **Private Workshop** will expand options to display Active Committee/Filers, Discontinued Committees, Candidacy Filings, and Voters' Pamphlet Filings links.

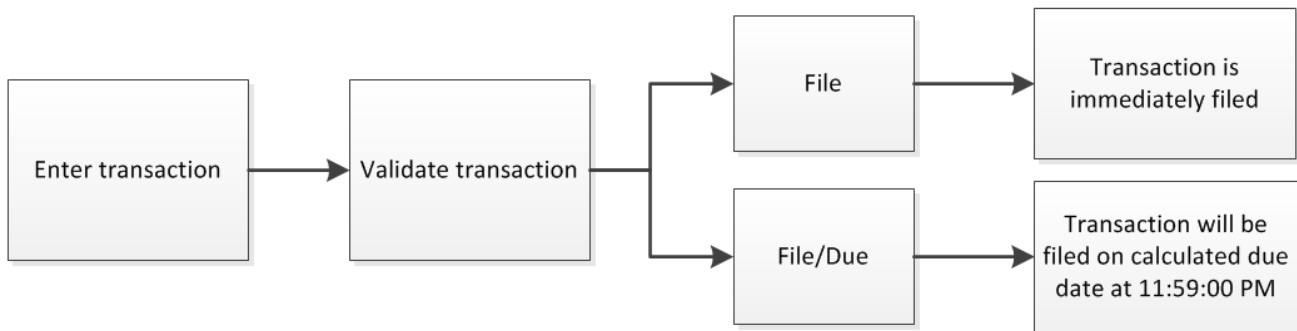


From the *Active Committee/Filers* page of **Private Workshop**, the user sees the active filers that the user can access. The campaign finance portion of ORESTAR is accessed by clicking the **Campaign Finance** button to the right of the filer name on the *Active Filers* page.

**i** ORESTAR is not currently optimized for mobile devices.

**!** If you are having trouble logging in, close all browsers. Open a new browser window and try again.

## Understanding the Transaction Filing Process



Submitting transactions in ORESTAR is a multi-step process: enter the transaction; validate the transaction; select to file the transaction either immediately or on its due date. The flow chart above presents a high-level overview of the process. Note that a transaction can also be saved prior to the validation step.

*Validating a transaction* verifies that the required information has been entered. Validating a transaction can also display an informational or warning message(s) (e.g., the transaction is late and a penalty may be subsequently imposed as it is being submitted after the filing deadline). In the event of an error message, it must be corrected prior to filing.



Refer to **Validate Error/Warning Messages** on *page 43* for more information

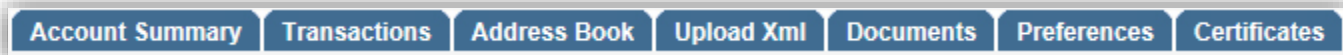
*Filing a transaction* is a two-step process before the information becomes available for public search: select a filing option, and then attest to the transaction. The two filing options to choose from are: *File* or *File/Due* (also referred to as “File When Due”). Clicking the **File** button will submit the transaction immediately after attestation. Clicking the **File/Due** button will –after the transaction has been attested to– schedule the transaction to be submitted on the transaction’s due date calculated by the system.



For more information about transaction due dates, see the [Campaign Finance Manual](#).

## Navigating the Campaign Finance Menu

Once in the Campaign Finance module from the Private Workshop page, a tab menu at the top allows a user to navigate within the system. The tabs and a brief description of each follows:



### Account Summary

This page displays the system-calculated totals for *filed* transactions in the current calendar year. The totals update each time a transaction is filed. The *Account Summary* does not reflect transactions that have been entered **but are not yet filed** or are scheduled to be *filed when due*. See **Account Summary** tab on *page 9* for more information.

### Transactions

This is a private space for a committee to enter, manage, and search its campaign finance transactions. For more information, reference one of the following sections:

- **Transactions** tab on *page 10* for an explanation of the buttons and column headings.
- **Transaction Management** starting on *page 29* for information on how to add, edit, delete transactions.
- **Filing Transaction by Type** starting on *page 51* for information on submitting transactions by the type of transaction.

### Address Book

This is an area for the committee to manage its contributors and payees. The Address Book feature allows a committee to enter a name once and reuse it for multiple transactions. For more information, reference one of the following sections:

- **Address Book** tab on *page 14* for an explanation of the buttons and column headings.
- **Address Book Management** starting on *page 20* for information on adding, editing, expiring and deleting address book entries.

### Upload Xml

Committees that use a separate campaign management software for entering transactions use this tab to upload files. See **Upload Xml** tab on *page 16* for more information and instructions to upload an XML file.

### Documents

This page displays a list of correspondence sent to a committee via email, such as Transaction Filing Report, XML Validation Report, Amendment Review Notification, and Exam Letter. See **Documents** tab on *page 17* for more information.

### Preferences

This allows a committee to set system level preferences. See **Preferences** tab on *page 18* for more information.

### Certificates


This allows a committee to file a Certificate of Limited Contributions and Expenditures for the current calendar year. For more information, reference one of the following sections:

- **Certificates** tab on *page 19* for an explanation on the button.
- **Filing a Certificate of Limited Contributions and Expenditures** on *page 65* for instructions on how to file a Certificate.

## Account Summary tab

Account Summary page

Account Summary		Committee to Elect an ORESTAR User (17981)
<a href="#">Account Summary</a>   <a href="#">Transactions</a>   <a href="#">Address Book</a>   <a href="#">Upload Xml</a>   <a href="#">Documents</a>   <a href="#">Preferences</a>   <a href="#">Certificates</a>		
<a href="#">Refresh</a>		
<b>Account Summary Information for the year 2016</b>		
<b>Contributions</b>		<b>Amount</b>
Cash Contributions		\$0.00
Loans Received (non-exempt)		\$0.00
In-Kind		\$0.00
<b>Total Contributions</b>		<b>\$0.00</b>
<b>Expenditures</b>		
Cash Expenditures		\$0.00
Loan Payments (non-exempt)		\$0.00
In-Kind		\$0.00
<b>Total Expenditures</b>		<b>\$0.00</b>
<b>Cash Balance</b>		
Beginning Balance (Previous Year)		\$0.00
Total Contributions		\$0.00
Other Receipts		\$0.00
Loans Received (exempt)		\$0.00
	<b>subtotal :</b>	\$0.00
Total Expenditures		\$0.00
Other Disbursements		\$0.00
Loan Payments (exempt)		\$0.00
	<b>subtotal :</b>	\$0.00
Balance Adjustments		\$0.00
<b>Ending Cash Balance</b>		<b>\$0.00</b>
<b>Financial Status</b>		
Cash Balance		\$0.00
Accounts Receivable		\$0.00
	<b>subtotal :</b>	\$0.00
Total Outstanding Loans		\$0.00
Outstanding Personal Expenditures		\$0.00
Accounts Payable		\$0.00
	<b>subtotal :</b>	\$0.00
<b>Balance Deficit</b>		<b>\$0.00</b>

 Independent Expenditure Filers will only see the Expenditures section on their *Account Summary* page.

The *Account Summary* page is accessed by clicking on the **Account Summary** tab. Use the **Prev** and **Next** buttons to move between calendar years, if the committee has been active in ORESTAR for more than one year. Amounts are updated after transactions have been filed.

The table provides an overview for each section:

<b>Contributions</b>	The amount of filed contributions, by type and grand total within the calendar year.
<b>Expenditures</b>	The amount of filed expenditures, by type and grand total within the calendar year.
<b>Cash Balance</b>	Reflects money in the financial account, calculated by adding all deposits to the <b>Beginning Cash Balance</b> and deduct disbursements or payments made in a calendar year. NOTE: The <b>Ending Cash Balance</b> amount should match the balance in the committees financial institution account <i>if</i> all transactions have been filed and all reported contributions and expenditures have cleared the bank account.
<b>Financial Status</b>	Calculates the balance/deficit based on the receivables and debts of the committee. These totals are carried forward for each new calendar year.

## Transactions tab

### Transaction Queue page

**Transaction Queue** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

Add Amend Delete File File/Due Validate Export Search Clear Prev Next

Results Found : 6

<input type="checkbox"/>	▲ ID #	▲ Date	▲ Due Date	▲ Status	▲ Process Status	▲ Contributor/Payee	▲ Tran Subtype	▲ Amount
<input type="checkbox"/>	2199569	06/01/2016	07/01/2016 11:59 PM	Original	New	Alex Monroe	In-Kind Contribution	\$225.30
<input type="checkbox"/>	2199573	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Costco	Personal Expenditure for Reimbursement	\$431.88
<input type="checkbox"/>	2199574	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Jack Smith	Cash Expenditure	\$431.88
<input type="checkbox"/>	2199534	06/10/2016	07/11/2016 11:59 PM	Original	New	US Post Office	Cash Expenditure	\$27.40
<input type="checkbox"/>	2199543	06/10/2016	07/11/2016 11:59 PM	Original	Validated	Advertising Agency	Cash Expenditure	\$100.00
<input type="checkbox"/>	2199576	06/15/2016	07/15/2016 11:59 PM	Original	Validated	Advertising Agency	Account Payable	\$500.00

\*Only 50 transactions are displayed at one time. Please search or click the Next or Previous buttons.

The *Transaction Queue* page is accessed by clicking on the **Transactions** tab. A committee can add, edit, delete, validate, file, search, and export transactions from this page. Transactions entered in a committee’s account do not become public record until they are filed.

For an overview about the transaction filing process, see *page 7*.

When the *Transaction Queue* is initially accessed, it displays original, amended, or deleted transactions that have not been filed. This page displays up to 50 transactions at a time. Use the **Prev** and **Next** buttons to move between pages if more than 50 transactions exist in the queue.

The transactions on this page display in descending order by transaction date. A red arrow to the left of the column heading indicates the current sort order. If the arrow is pointing up, the results are sorted by that field in descending order (the most recent date first). If the arrow is pointing down, the results sort by that field in ascending order. Clicking once on the red arrow will reverse the sort order. A user can change the sort order of the page at any time by clicking on the arrow in the column the user wishes to sort by.

To view detailed transaction information, click on the **ID #** of the desired transaction. To view Address Book information for a transaction, click on the **Contributor/Payee** name of the desired transaction.

### Buttons on Transaction Queue page

A list of the functions for each button on the *Transaction Queue* page and a description of the action performed by each button follows:

Prior to clicking the **Amend**, **Delete**, **File**, **File/Due** or **Validate** buttons, transactions must be selected by checking the box next to the ID. Note that only one transaction can be selected when using the **Amend** button. To select all transactions displayed on the page, click in the box at the top that appears in the gray-shaded row with the column labels.

#### Add

Opens the *Transaction Add/Edit* page for entry of a new transaction.

**Amend**

Opens the *Transaction Add/Edit* page to edit a previously entered transaction.

**Delete**

Deletes the selected transaction(s).



If the transaction had been previously filed, it must be filed again after deleting the transaction. These transactions remain a public record; however, it will show a deleted status.



If the transaction was NOT previously filed, it will be deleted permanently from the system and no further action is required. A transaction that is deleted prior to filing is not a public record because it was never filed.

**File**

Opens the *Attestation* page where the candidate, treasurer, alternate transaction filer, or independent expenditure filer attests to the information. Note: To file the transaction(s) immediately, the user must click the **File** button on the *Attestation* page.

**File/Due**

Opens the *Attestation* page where the candidate, treasurer, alternate transaction filer, or independent expenditure filer attests to the information. Note: To file the transaction(s) at approximately 11:59:00 PM on the calculated due date, the user must click the **File/Due** button on the *Attestation* page.



**File** or **File/Due** transactions will no longer display in the *Transaction Queue*, but can be found using the Search feature.

**Validate**

Performs validation on the selected transaction(s) and displays the validation results. Note: transactions must be validated prior to filing.

**Export**

Exports all transactions on the *Transaction Queue* page to an Excel spreadsheet. A maximum 5,000 transactions can be exported at a time.

**Search**

Opens the *Transaction Search* page where a user can search for transactions associated with the committee. Search results display on the *Transaction Queue* page.

**Clear**

Clears transaction search results and displays the transactions yet to be filed on the *Transaction Queue* page.

**Prev**

Displays the previous page of transactions, if more than 50 transactions exist in the *Transaction Queue*.

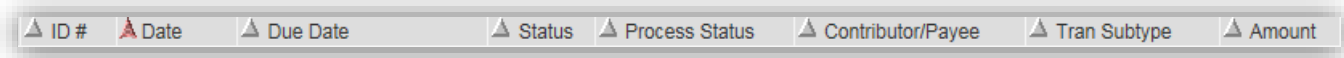
**Next**

Displays the next page of transactions, if more than 50 transactions exist in the *Transaction Queue*.

### Column Headings for Transaction Queue

When the *Transaction Queue* page is first accessed it displays original, amended, and deleted transactions that have not been filed. This page is also used to search for transactions associated with the committee.

The following is a brief explanation of the information in the columns displayed in the *Transaction Queue* page:



**ID #**

A unique identification number that is automatically assigned to a transaction. Note: a new ID number is assigned if a transaction is amended or deleted.

**Date**

The date of the transaction.

**Due Date**

The system-calculated due date for the transaction. Note: transactions are due by 11:59:00 PM on the due date.



For more information about transaction due dates, see the current Campaign Finance Manual.

**Status**


Each transaction is assigned one of the following statuses:


Status	Description
<b>Original</b>	A newly-entered, validated or filed transaction.
<b>Amended</b>	A transaction that is changed <i>after</i> it has been filed using either <b>File</b> or <b>File When Due</b> .
<b>Deleted</b>	A transaction that is deleted after it has been filed. Transactions that have not been filed but subsequently deleted, are removed from the system.

**Process Status**

Each transaction is assigned one of the following process statuses:

Process Status	Description
<b>New</b>	A new transaction that is ready to be validated and filed.
<i>After <u>validating</u> a transaction, it will have one of the following process statuses:</i>	
<b>Validated/Warnings</b>	A transaction that has one or more warnings or informational messages.
<b>Validated/Error</b>	A transaction that has one or more error messages associated with it. The error <u>must be</u> corrected to file the transaction.
<b>Validated</b>	A transaction that does not have any validation error messages.

Process Status	Description
After <i>filing</i> a transaction, it will have one of the following process statuses:	
<b>File When Due</b>	A transaction that will be automatically filed on the due date, approximately one hour before the transaction is due. A transaction with this status is not a public record until it is processed.
<b>Filing in Progress</b>	A transaction that is being processed by the system.
<b>Filed</b>	A transaction that has been filed and is public record.
Transactions using the <i>system aggregate calculation</i> function will display two records, one with each of the following process status:	
<b>Aggregated</b>	A transaction that has been filed and is determined to be exempt from public record because the aggregate of the contributor or payee has not exceeded \$100 for the calendar year. The transaction amount is included in the appropriate ‘miscellaneous \$100 and under’ category based on the transaction sub type.
<b>Complete (System):</b>	This transaction is the public version of a transaction with the <b>Aggregated</b> process status. A ‘miscellaneous \$100 and under’ transaction that is automatically generated by the system when a committee using the system aggregate calculation function files a contribution or expenditure transaction and the calendar year aggregate for the contributor or payee is \$100 or under.
After a filed transaction <i>is examined for sufficiency</i> by the Elections Division, it will have one of the following process statuses:	
<b>Insufficient/General</b>	A transaction that is missing information that is required by administrative rule. Failure to satisfy the insufficiency by the amendment deadline provided in the exam letter may result in a civil penalty.
<b>Insufficient/Statutory</b>	A transaction that is missing information that is required by statute. Failure to satisfy the insufficiency by the amendment deadline provided in the exam letter may result in a civil penalty.
<b>Complete</b>	A transaction that has been examined and is determined to be sufficient.   Transactions with a process status of Aggregated or Complete (System) are <u>not</u> examined.
For committees who have filed a <b>Certificate of Limited Contributions and Expenditures</b> :	
<b>Certificate Filed</b>	A transaction entered into ORESTAR by a committee that filed a Certificate of Limited Contributions and Expenditures but the transaction is not filed because the committee did not exceed \$3,500 in contributions or \$3,500 in expenditures during the calendar year. This process status is assigned on January 1 to transactions in the prior year.

 The process status of a filed transaction generally relates to the sufficiency of the information provided with the transaction. The process status is not an indication of whether or not a transaction is filed timely. For example, a transaction with the **Complete** process status may still be subject to a civil penalty if the transaction is filed late.

**Contributor/Payee**

The name of either the contributor, payee, or other person for the transaction.

**Tran Sub type**


The transaction sub type for the transaction.

**Amount**

The amount of the transaction.

**Address Book tab**

*Address Book List page*




The screenshot shows the 'Address Book List' page for a 'Committee to Elect an ORESTAR User (17981)'. The page has a navigation bar with tabs: Account Summary, Transactions, Address Book (selected), Upload Xml, Documents, Preferences, and Certificates. Below the tabs are buttons for Add, Edit, Delete, Export, Search, Clear, Prev, and Next. The main content is a table with the following data:

ID#	Name	Address Information	Orig ID #
917292	Advertising Agency	123 Main St , Salem , OR	917292
917316	Homer Simpson	742 Evergreen Terrace , Springfield , OR	917316
917293	Jack Smith	1200 Center St , Portland , OR	917293
917294	Jill Smith	1200 Center St , Salem , OR	917294
917291	Oregon Department of Revenue	955 Center St , Salem , OR	917291
917318	The Electric Company of Oregon	1234 Voltage Rd , Portland , OR	917318
917317	The Insurance Co.	PO Box 111 , Portland , OR	917317
917319	US Post Office	123 Main St , Your City , OR	917319
917290	Website Designer Co.	PO Box 1 , Salem , OR	917290

\*Only 25 contacts are displayed at one time. Please search or click the Next or Previous buttons.

The *Address Book List* page is accessed by clicking on the **Address Book** tab. The Address Book stores basic information about each individual or entity that is involved with a committee’s transactions. **Each name is entered only once**, even if the individual or entity is associated with multiple transaction types.

 It is important that an individual or entity is only entered once in the Address Book because Address Book entries are used to aggregate transactions in the ORESTAR system.

When the *Address Book List* is first accessed, it displays all current Address Book entries associated with the committee. This page displays up to 25 Address Book entries at a time. Use the **Prev** and **Next** buttons to move between pages if more than 25 Address Book entries exist in the list.

Address Book entries on this page display in ascending order by name. A red arrow to the left of the field name indicates the current sort order. If the arrow is pointing up, the results sort by that field in ascending order (A – Z). If the arrow is pointing down, the results sort by that field in descending order (Z-A). Clicking once on the red

arrow will reverse the sort order. A user can change the sort order of the page at any time by clicking on the arrow in the column the user wishes to sort by.

Click on the name of the desired Address Book entry to see detailed information.

### Buttons on Address Book List page

A list of the function for each button on the *Address Book List* page and a brief description of the action performed by each button follows:



An Address Book entry must be selected before clicking **Edit** or **Delete**. To select an Address Book entry, click in the circle to the left of the ID #.

#### **Add**

Opens the *Address Book Add/Edit* page for entry of a new person/entity.

#### **Edit**

Opens the *Address Book Add/Edit* page with the information for the selected Address Book entry. This page also allows for expiring an entry.

#### **Delete**

Deletes the selected Address Book entry if the person is not associated with any transactions.

#### **Export**

Exports the most recent version of each of the committee's Address Book entries to an Excel spreadsheet. Expired Address Book entries are not included in the export.

#### **Search**

Displays the *Address Book Search* page where a user can search for Address Book entries associated with the committee. Search results display on the *Address Book List* page.

#### **Clear**

Clears Address Book search results and returns the *Address Book List* page to its initial display.

#### **Prev**

Displays the previous page of Address Book entries, if more than 25 Address Book entries exist in the list.

#### **Next**

Displays the next page of Address Book entries, if more than 25 Address Book entries exist in the list.

▲ ID#	▲ Name	Address Information	▲ Orig ID #
-------	--------	---------------------	-------------

### Column Headings for Address Book List page

When the *Address Book List* is first accessed it displays all current Address Book entries associated with the committee. The page is also used to display search results for Address Book entries associated with the committee.

The following on the next page is a brief explanation of the information in the columns that displays on the *Address Book List* page:

**ID #**

This is the unique identification number that is automatically assigned to an address entry by the system. If the Address Book entry is uploaded via an XML file, the ID number in the XML file is appended to the ID number assigned by ORESTAR.

**Name**

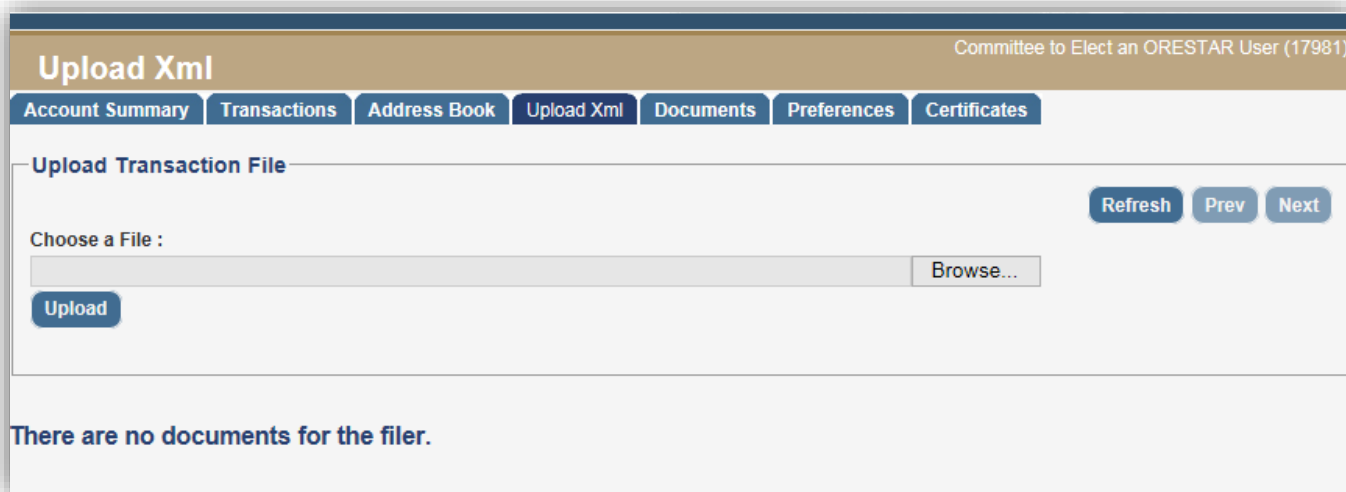
This is the name of the individual or entity associated with the Address Book entry.

**Address Information**



This is the address information associated with the Address Book entry.

**Orig ID #**

This is the original ID number associated with the current Address Book entry. Each time an Address Book entry that is associated with a filed transaction is edited, a new Address Book entry is automatically created by the system and the previous Address Book entry is expired.

**Upload XML tab**


Committees that choose to enter transaction information into a system other than ORESTAR use this function to upload the transaction information in an XML file format.

-  A maximum of 2,000 transactions and 2,000 contacts can be uploaded in a single XML file.
-  Visit [www.oregonvotes.gov](http://www.oregonvotes.gov) for more information about XML, the file format specifications, and sample files.

Once the XML file is ready, follow the instructions below to upload the file into ORESTAR:

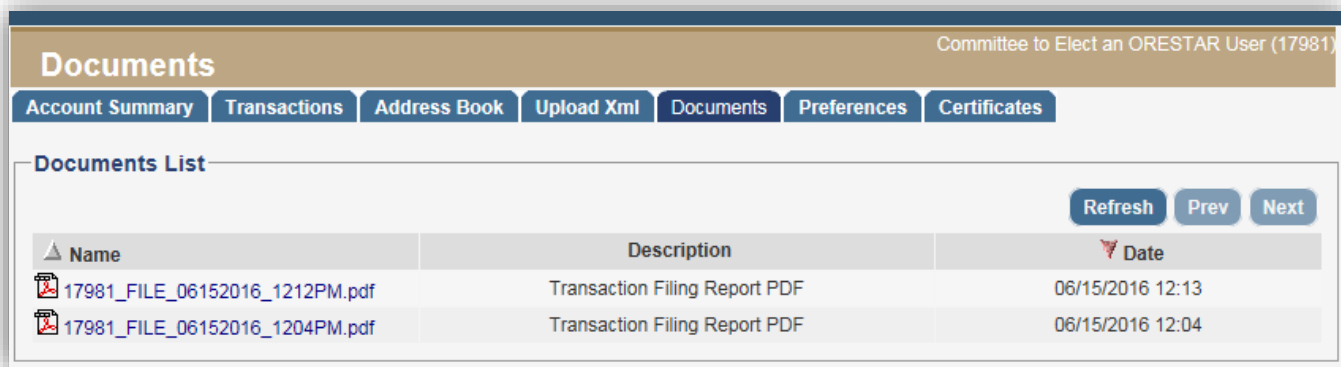
1. Click on the **Upload Xml** tab.
2. Click on the **Browse** button. A window will open to search for the file on the user's computer.
3. Select the XML file to upload and click **Open**. The dialog box will close and the file name will display on the *Upload Xml* page.

4. Click **Upload**.
5. The uploaded file is validated to ensure it meets the XML file format specifications. An error message “Invalid XML File” will be appear if the file was not uploaded because it did not comply with the format specifications.
6. If the file passes the XML file validation, the transactions are uploaded into ORESTAR and a second level of validation is performed on the data contained in the file.
7. An email with “XML Validation” in the subject line is sent to the candidate, treasurer, alternate transaction filer, correspondence recipient and vendor, if applicable. The report contains a list of transactions in the XML file and identifies validation errors, if any, associated with each transaction. The report also informs the user if transactions were successfully saved to ORESTAR. The report can also be accessed by clicking on the **Documents** tab in the committee’s account.
8. The uploaded transactions display in the committee’s *Transaction Queue* ready for filing by the candidate, treasurer or alternate transaction filer of the committee. See **File a Transaction** on page 45.

 Uploaded transactions should not be amended directly in ORESTAR. If data is changed after it is uploaded, the original data will be out of sync with the data in ORESTAR. This could cause problems with any subsequent amendments.

## Documents tab


*Documents List page*



The *Documents List* page is accessed by clicking on the **Documents** tab. It contains a list of correspondence sent to the committee via email, such as Transaction Filing Reports, XML Validation Reports, Exam letters, and Amendment Review Notification letters.

The page displays up to 50 documents at a time. Use the **Prev** and **Next** buttons to move between pages if more than 50 documents exist.

The documents on this page will display in descending order by the document date. A red arrow to the left of the field name indicates the current sort order. If the arrow is pointing up, the results sort by that field in ascending order. If the arrow is pointing down, the results sort by that field in descending order. Clicking once on the red arrow will reverse the sort order. A user can change the sort order of the page at any time by clicking on the arrow in the column the user wishes to sort by.

 All documents are in a PDF format and can be opened using a free Adobe Acrobat Reader.

## Preferences tab

*Preferences page*

The *Preferences* page is accessed by clicking on the **Preferences** tab. This page allows a user to set the preference within the system that is specific to the committee.

A committee may choose to allow ORESTAR to track and calculate calendar year aggregate totals for contributors and payees or may choose to track each contributor and payee aggregates manually or in another system.



A committee may change its preference at the beginning of each calendar year, prior to entering any transactions in ORESTAR for the calendar year. After transactions are entered for a calendar year, the preference choice cannot be changed.

### Opt In (to System Calculations)

The Elections Division recommends that most committees allow ORESTAR to calculate contributor and payee aggregates to assist the committee in complying with Oregon's campaign finance laws. A new committee is automatically "opted in" to using the system aggregate calculation function.

A committee that allows ORESTAR to calculate contributor and payee aggregates will enter each transaction, regardless of the amount, and the system determines if a transaction should be disclosed to the public or should be included in the appropriate 'miscellaneous \$100 and under' category. For each transaction where the contributor's or payee's aggregate is \$100 and under, the system will automatically create the appropriate 'miscellaneous \$100 and under' for each day these transactions occur.



On the *Transaction Add/Edit* page, the 'Calendar Year Aggregate' is the total amount of contributions or expenditures for the contributor/payee in the calendar year, as of the date of the transaction.

### Opting Out (of System Calculations)

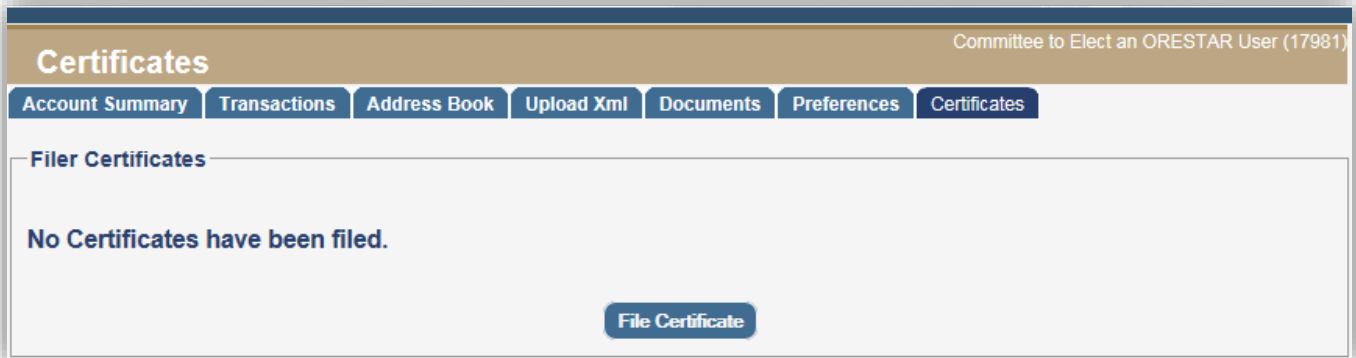
A committee that chooses to use a separate system to track and calculate contributor and payee aggregates will enter detail only for those transactions where the contributor's or payee's aggregate is over \$100. For transactions where the contributor's or payee's aggregate is \$100 and under, the committee will enter a 'miscellaneous \$100 and under' transaction for each day these transactions occur (ranges of dates are not allowed). In addition, the committee must enter a Calendar Year Aggregate amount for each contribution or expenditure transaction entered, other than 'miscellaneous \$100 and under' transactions.

To opt out of using the system aggregate calculation function for the current calendar year, uncheck the box and click on **Update**. A pop-up window displays with a warning message about the effects of opting out of the system aggregate function. Click **OK** on the pop-up screen and click on **Update** again to confirm the change.


To opt back in to the system aggregate calculation function for the current calendar year, check the box and click on the **Update** button. However, once an “opt out” committee has filed transactions for the current calendar year, it cannot “opt in” until January 1 of the next calendar year.

## Certificates tab


*Certificates page*

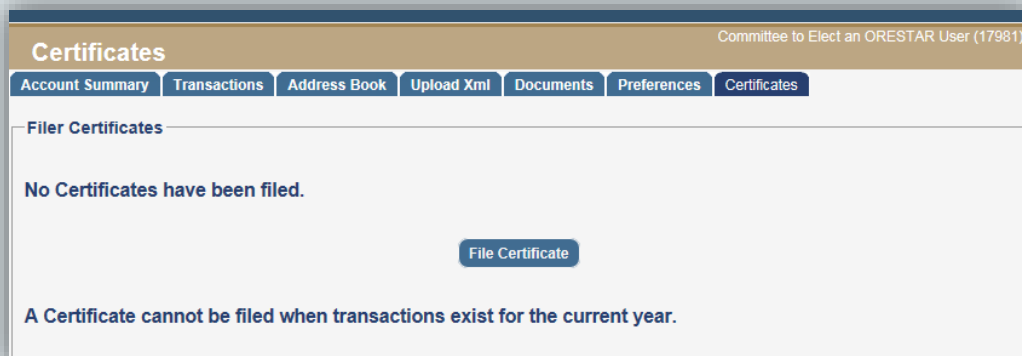


The *Certificates* page is accessed by clicking on the **Certificates** tab. This page allows a committee to file a Certificate of Limited Contributions and Expenditures or view certificates filed by the committee.

 For more information on filing a Certificate, see *page 65*

A committee may file a *Certificate of Limited Contributions and Expenditures* for the current calendar year if the committee does not expect to receive a total of more than \$3,500 and does not expect to spend a total of more than \$3,500 during the calendar year.

 When transactions have been entered or filed for the current year, a Certificate cannot be filed. If a committee attempts to file a Certificate, they will receive the following message:



# Address Book Management

*Address Book List page*

**Address Book List**
Committee to Elect an ORESTAR User (17981)

Account Summary
Transactions
Address Book
Upload Xml
Documents
Preferences
Certificates

Add
Edit
Delete
Export
Search
Clear
Prev
Next

<input type="checkbox"/>	▲ ID#	▲ Name	Address Information	▲ Orig ID #
<input type="radio"/>	917292	Advertising Agency	123 Main St , Salem , OR	917292
<input type="radio"/>	917293	Jack Smith	1200 Center St , Portland , OR	917293
<input type="radio"/>	917294	Jill Smith	1200 Center St , Salem , OR	917294
<input type="radio"/>	917291	Oregon Department of Revenue	955 Center St , Salem , OR	917291
<input type="radio"/>	917290	Website Designer Co.	PO Box 1 , Salem , OR	917290

\*Only 25 contacts are displayed at one time. Please search or click the Next or Previous buttons.

This section explains how to add, edit, delete, expire, unexpire and search for address book entries. It also provides information about how to complete each of the fields.

Do not use the Back button on your browser when navigating through ORESTAR.

# Add an Address Book Entry

Address Book Add/Edit page

Committee to Elect an ORESTAR User (17981)

## Address Book Add / Edit

Account Summary
Transactions
Address Book
Upload Xml
Documents
Preferences
Certificates

Save
Reset
Cancel

Expire Entry

**Address Book Information**

Type\*

**Name Information:**

	Prefix	First Name	MI	Last Name	Suffix	Title
Individual Name	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Business/Organization Name	<input type="text" value=""/>					
Committee Name/ID	<input type="text" value=""/>					
Filer Book Id	<input type="text" value=""/>					

**Address Information:**

Street/PO Box

Country/Region:

City, State, Zip Code:   -

County

Postal Code

**Contact Information:**

Work Phone (555)555-5555  Extension

Home Phone

Fax

Email address

**Occupational Information:**

Not Employed  Self-Employed

Occupation

Employer's Name

Employer's City/State

**!** Each name is entered only once, even if the individual or entity is associated with multiple transaction types. Duplicate Address Book entries cause aggregates to calculate incorrectly.

To access the *Address Book Add/Edit* page click the **Add** button on the *Address Book List* page. The *Address Book Add/Edit* page may also be accessed from within the *Transaction Add/Edit* page by clicking on the **Add** button to the right of the 'Contributor/Payee' name field or the 'Payer of Personal Expenditure' name field.

**Buttons on Address Book Add/Edit page**

A list of the buttons on the *Address Book Add/Edit* page and a brief description of the action performed by each button follows:

**Save**

Saves the *Address Book* entry and returns the user to the *Address Book List*.

**Reset**

Clears all unsaved changes on the page.

**Cancel**

Returns the user to the *Address Book List* without saving any changes on the page.

**Completing the Form**

There are two options to add an address book entry: either from the *Address Book List* page, or from the *Transaction Add/Edit* page. The steps for each option are detailed below:

**Adding an address book entry from the *Address Book List* page:**

The following steps are grouped into five sections: *Type*, *Name Information*, *Address Information*, *Contact Information*, and *Occupational Information*. You can either use the tab key on the keyboard to move between fields or click in the field with the mouse pointer.

**1. Type**

Select the type of address book entry from the dropdown list. The following table provides a description and examples for each type:

<b>Type of Address Book Entry</b>	<b>Description</b>
<b>Business Entity</b>	Includes for-profit and professional corporations, cooperatives, partnerships, limited liability companies, sole proprietorships, etc.
<b>Candidate’s Immediate Family</b>	Includes the candidate, the candidate’s spouse and any child, parent, grandparent, brother, half-brother, sister or half-sister of the candidate and the spouses of such persons, but does not include family members of the candidate’s spouse.
<b>Individual</b>	Includes individuals who are not the candidate and not the candidates immediate family.
<b>Labor Organization</b>	An organization, agency, or representative committee in which employees participate, for the purpose of engaging in collective bargaining with employers over conditions of employment.
<b>Other</b>	Includes clubs, associations, nonprofit corporations, tribal organizations, trusts, governmental entities, etc.

Type of Address Book Entry	Description
Political Committee	Committees filed in the State of Oregon or any other jurisdiction, including candidate committees, petition committees and political action committees.
Political Party Committee	A committee established by a major or minor political party in Oregon, including county central committees.
Unregistered Committee	A committee that is not registered with the Oregon State Elections Division. This includes out-of-state committees and federal committees.

**2. Name Information**

The *Type* selected will determine the name fields that are available for entry:

Name Field	Description
Candidate’s Immediate Family or Individual	The individual’s first and last name. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) are optional.
Business Entity, Labor Organization or Other	The name of the business or organization.
Political Committee or Political Party Committee	Begin typing any part of the committee’s name in the <i>Committee Name/ID</i> field and a list will display with possible matches. Select the appropriate committee from the list. If the committee does not appear on the list because it is not registered with the Secretary of State. Change the <b>Type</b> dropdown to ‘ <i>Unregistered Committee</i> ’ and enter the name of the committee.
Filer Book ID	The unique ID number for transactions uploaded via XML file. This field will be blank if entering data directly into ORESTAR.

**3. Address Information**

The table below describes address requirements based on the transaction type association:

If the <i>type</i> is associated with a:	Then enter this address:
Contributor (with a US address)	Street address or PO Box, city, state and zip code
Contributor (with a foreign address)	Street address, country/region, city, and postal code
Payee	City, or county if no city, and state where the payee is located
Political Committee or Political Party Committee	Address is automatically populated from the committee’s most recent Statement of Organization



Do not disclose the address of a person who has an address exempt from public disclosure.


**4. Contact Information**

Contact information in this section is optional.

**5. Occupational Information**

Occupation information is only required for *Individual* or *Candidate’s Immediate Family* types.

If the <i>Individual</i> is:	Then:
Not Employed (includes retired, student, homemaker, volunteer)	Check the <b>Not Employed</b> box.
Self-Employed	Check the <b>Self-Employed</b> box, and Enter the nature of the individual’s business in the <i>Occupation</i> field.
Employed by another entity	Enter their occupation, employer’s name and address (city and state).

 Refer to the [Campaign Finance Manual](#) for more information about sufficient occupation information.

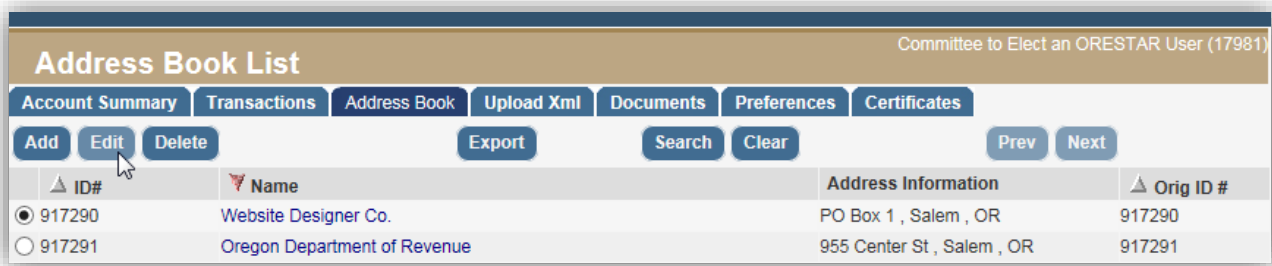
**Save the Entry**

When you have completed the address book entry, click the **Save** button at the top of the form. Afterwards, you will return to the *Address Book List* page.

**Edit an Address Book Entry**

There are two ways to edit an address book entry: either from the *Address Book List* page, or from the *Transaction Add/Edit* page. The steps for each option are detailed below:

**To edit an Address Book entry from the *Address Book List* page:**



1. Select the entry to edit by clicking in the circle to the left of the ID #. Then click the **Edit** button.
2. The *Address Book Add/Edit* page opens with the Address Book information.
3. Make the appropriate changes and click on **Save**.

To edit an Address Book entry from the *Transaction Add/Edit* page:


1. Click on the **Edit** button to the right of the *Contributor/Payee name field*. If the transaction is a *Personal Expenditure for Reimbursement*, click on the **Edit** button next to the *Payer of Personal Expenditure* field.
2. The *Address Book Add/Edit* page opens with the Address Book information. Make the appropriate changes and click on **Save**.

Keep in mind that editing an Address Book entry:

- will update all transactions linked with that Address Book entry that have not yet been filed, but does not update a filed transaction.
- a *File When Due* transaction requires that the user validate and re-file the transaction. The transaction will need to be attested to again.
- ORESTAR keeps a history of the changes if entry is associated to a filed transaction. To view the history, users can search for expired Address Book Entries. See *page 28* for more information on *Searching the Address Book*.

## Delete an Address Book Entry

An Address Book entry can be deleted *only* if it is not linked with a transaction.

 If the address book entry is linked with a transaction, see the next section on *Expiring Address Book Entries*

ID#	Name	Address Information	Orig ID #
917292	Advertising Agency	123 Main St , Salem , OR	917292
917382	Alex Monroe	200 12th Street , Portland , OR	917382
917383	Costco	1010 Hawthorne Ave SE , Salem , OR 917383	

To delete an Address Book entry:

1. Click in the circle to the left of the ID #.
2. Click the **Delete** button.
3. Click **Yes** on pop-up box to confirm deletion.

## Expire an Address Book Entry

An Address Book entry can be expired. This means after expiring an Address Book entry, it will no longer display on the *Address Book List* page and will not appear in the *Contributor/Payee* or *Payer of Personal Expenditure* list on the *Transaction Add/Edit* page. However, the entry can be found by using the **Search** feature and checking the "Show Expired Entries" box.

To expire an Address Book entry:

1. Click in the circle to the left of the ID #.

ID#	Name	Address Information	Orig ID #
917292	Advertising Agency	123 Main St, Salem, OR	917292
917382	Alex Monroe	200 12th Street, Portland, OR	917382
917383	Costco	1010 Hawthorne Ave SE, Salem, OR	917383

2. Click the **Edit** button. The *Address Book Add/Edit* screen will open.
3. Check the **Expire Entry** box.

**Address Book Add / Edit**

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

Save Reset Cancel

Expire Entry

**Address Book Information**

Type\* Business Entity

**Name Information:**

Individual Name Prefix First Name MI Last Name Suffix Title

Business/Organization Name Advertising Agency

Committee Name/ID

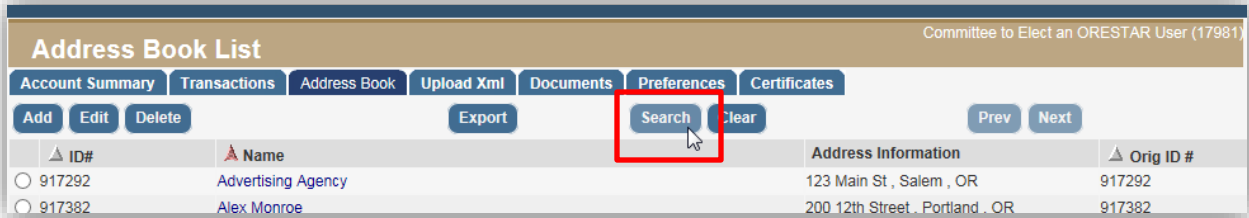
Filer Book Id

4. Click the **Save** button to save and return to the *Address Book List* page.

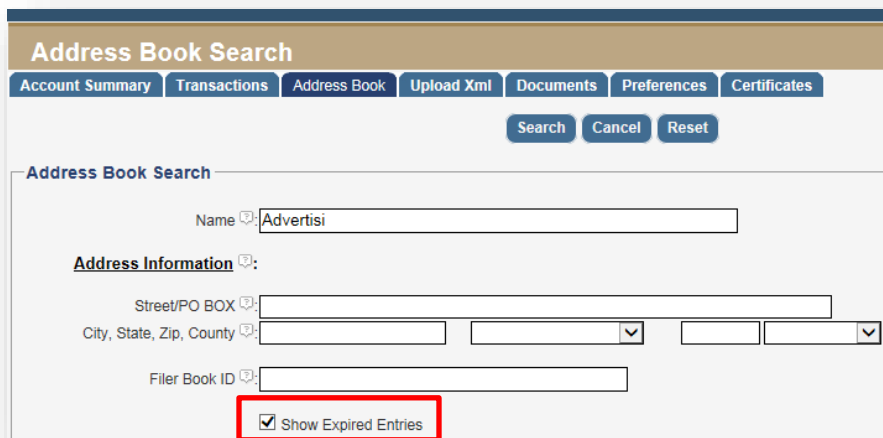
## Unexpire an Address Book Entry

An Address Book entry that is *expired* can be re-activated, or “unexpired”. To unexpire an address book entry:

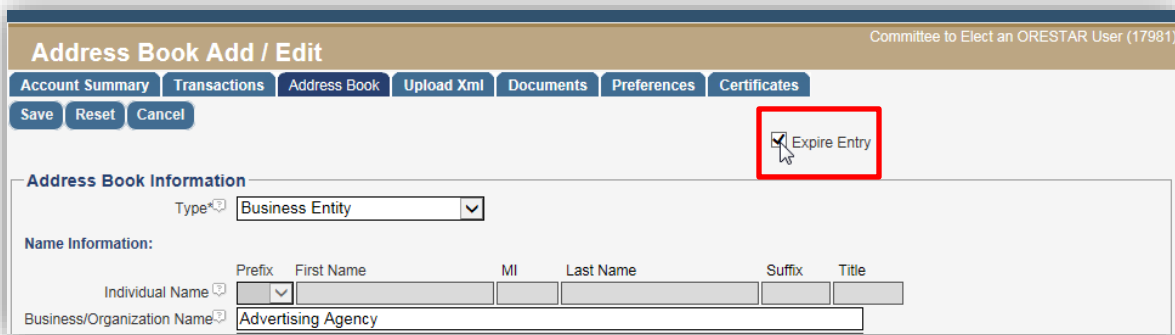
1. Click the **Search** button on the *Address Book List* page. The Address Book Search screen will open.



2. Enter the name and check the box for **Show Expired Entries**.



3. Click in the circle next to the row and then the **Edit** button. The *Address Book Add/Edit* screen will open.



4. Make changes to the entry, if needed, and uncheck the box **Expire Entry**.
5. Click the **Save** button to save and return to the *Address Book List* page.

## Searching the Address Book

### Address Book Search page

**Address Book Search** Committee to Elect an ORESTAR User (17981)

[Account Summary](#)
[Transactions](#)
[Address Book](#)
[Upload Xml](#)
[Documents](#)
[Preferences](#)
[Certificates](#)

[Search](#)
[Cancel](#)
[Reset](#)

**Address Book Search**

Name

**Address Information**:

Street/PO BOX

City, State, Zip, County

Filer Book ID

Show Expired Entries

The *Address Book Search* page is accessed by clicking the **Search** button the *Address Book List* page. It allows a user to search for Address Book entries.

1. Enter a portion of the Address Book name or address, or enter the Filer Book ID for an Address Book entry uploaded via an XML file and click on **Search**. The results of the search display on the *Address Book List* page.
2. Click on name of the desired Address Book entry to view address, contact and occupational information.
3. From the search results page, the user may edit, expire, or delete an Address Book entry as previously reviewed, or search for another entry. If more than 25 Address Book entries match the search criteria, click the **Prev** or **Next** buttons to move between pages.
4. If the Address Book entry being searched for is not in the committee's Address Book, the user may click on the **Add** button from the *Address Book List* page.
5. Click on **Clear** to remove the search results from the *Address Book List* and restore the page to its initial display.

# Transaction Management

This section explains how to add, amend, or delete a transaction. It also provides information about how to complete each of the fields.

**!** Do not use the Back button on your browser when navigating through ORESTAR.

## Add a Transaction

To add a transaction, click the **Transactions** tab, then click the **Add** button from either the *Transaction Queue* or *Transaction Validation* pages.

The *Transaction Add/Edit* page opens, ready for data entry:

**i** Grayed out fields do not allow you to enter information (ex., **Agent, Payment Method, Interest Rate**). Unless the field is grayed out, the red asterisk next to the label indicates that the field requires data entry of information in order to save the transaction(ex., **Transaction Date, Sub Type, Amount**).

### Buttons on the Transaction Add/Edit page

A list of the buttons on the *Transaction Add/Edit* page with a brief description of the action performed by each button follows:

#### Validate

Saves the transaction and displays the *Transaction Validation* page with the validation results for the transaction.

**Save/Exit**

Saves the transaction without validating it and returns the user to the *Transaction Queue*.

**Save/Add**

Saves the transaction without validating it and returns to the *Transaction Add/Edit* page, ready for an entry of a new transaction.

**Cancel**

Returns the user to the *Transaction Queue* without saving any changes on the page.

**Reset**

Clears all unsaved changes on the page.

**Completing the Form**

This section explains each field on the *Transaction Add/Edit* page, including dropdown options and descriptions, and further instructions. The Elections Division strongly encourages users to review the [Campaign Finance Manual](#) for information about information required by statute and administrative rule. To move between fields, you can either use the tab key on the keyboard or click in the field with the mouse pointer.

**Transaction Date**

Click on the button to the right of the transaction date field to select from the calendar pop-up, or enter the date of the transaction in the format of MM/DD/YYYY. The table below explains the date to use based on the transaction type or sub type:

<b>If the transaction is:</b>	<b>Then enter this date:</b>
<b>Cash Contribution, Loan Received or Other Receipt</b>	The date that the money is received into the committee's physical custody.
<b>Contribution by Electronic Funds Transfer (EFT)</b>	The date the money is credited to the committee's financial institution.
<b>In-Kind Contribution</b>	The date the committee first has knowledge of the in-kind contribution.
<b>Cash Expenditure, Loan Payment or Other Disbursement</b>	Either the date written on the check, the date the committee’s credit or debit card is used, or the date of the EFT.
<b>Expenditure for Bank Service Charges / Fees, Credit Card Fees</b>	The date that the committee first has knowledge of the fee, e.g., the date the committee receives a statement from the bank or credit card company reporting the amount of the charge / fee.
<b>Payment Made by Electronic Funds Transfer</b>	The date that the funds are withdrawn from the bank account.  It is <u>not</u> the date the committee receives the bank statement reporting the amount of the transfer. Examples of electronic payments include monthly automatic bill payment or the withdrawal of funds from the committee’s account for payroll.

If the transaction is:	Then enter this date:
<b>Personal Expenditure for Reimbursement</b>	The date that the personal expenditure is made by the person. For example, enter the date the credit card was used, not the date the statement was received or the date payment was made to the credit card company.
<b>Account Payable</b>	The date the obligation is first incurred, even if an invoice is not received until a later time. For example, enter the date an order for goods or services is placed.

**Transaction Type**

Select the appropriate transaction type from the dropdown list. The choices are:

- Contribution
- Expenditure
- Other
- Other Account Receivable
- Other Disbursement
- Other Receipt

**Sub Type**

The available choices for transaction sub types are based on the *Transaction Type* that has been selected.



For further explanation of the transaction sub types, refer to the [Campaign Finance Manual](#).

Transaction Type	Available Transaction Sub Types
Contribution	Cash Contribution In-Kind Contribution In-Kind/Forgiven Account Payable In-Kind/Forgiven Personal Expenditure Loan Received (Non-Exempt)
Expenditure	Account Payable Cash Expenditure Loan Payment (Non-Exempt) Personal Expenditure for Reimbursement
Other	Account Payable Rescinded Cash Balance Adjustment Loan Forgiven (Non-Exempt) Personal Expenditure Balance Adjustment


Transaction Type	Available Transaction Sub Types
Other Account Receivable	Miscellaneous Account Receivable
Other Disbursement	Loan Payment (Exempt) Miscellaneous Other Disbursement Nonpartisan Activity Return or Refund of Contribution
Other Receipt	Interest/Investment Income Items Sold at Fair Market Value Loan Received (Exempt) Lost or Returned Check Miscellaneous Other Receipt Refunds and Rebates

**Payer of Personal Expenditure**

For expenditure transactions with a sub type of *Personal Expenditure for Reimbursement*, the payer is the person who made the expenditure and expects reimbursement from committee funds.


When entering a Personal Expenditure for Reimbursement transaction:

1. Begin typing any part of the name in the In the *Payer of Personal Expenditure* field.
  - a. If the name appears on the dropdown list, select the entry by clicking on it.
  - b. If the name does not appear in the list, click the **Add** button located to the right of the *Payer of Personal Expenditure* name field. This will open the *Add/Edit Address Book* entry page to create a new Address Book entry. See **Add an Address Book Entry** on page 21 for more information.
2. After selecting or adding the name associated with the transaction, the address information from the Address Book will display in the box to the right of the Contributor/Payee name field. If the information needs to be updated, click on the **Edit** button to the right of the *Payer of Personal Expenditure* name field. Make the necessary changes to the Address Book entry and click the **Save** button. The user returns to the *Transaction Add/Edit* page and the updated information displays.

 If aggregate expenditures to a payee exceed \$100 during a calendar year, then the address (city and state) for the payee is required.

**Contributor/Payee**

This section reviews who to enter as either the contributor, payee, entity, or other person linked with the transaction. The table below provides the type of address book entry followed by instructions.

 This field is not required for the following transaction sub types: Cash Balance Adjustment, Interest/Investment Income, Items Sold at Fair Market Value, Nonpartisan Activity, and Personal Expenditure Balance Adjustment.

**!** A committee **cannot accept an anonymous contribution**. If a committee receives an anonymous contribution, they must donate it to an organization that can accept anonymous contributions.

**⌚** If a committee has kept an anonymous contribution for *more than seven days* or has deposited it in the campaign account, the committee must disclose receipt of the anonymous contribution as a cash contribution and report the disbursement of the anonymous funds as a cash expenditure.

Address Book	
Committee’s Address Book	<b>It is important that a contributor/payee is only entered once in the Address Book</b> because the aggregate is calculated based on the Address Book entry.
Global Address Book	<ul style="list-style-type: none"> <li>• Petition Circulators</li> <li>• Payroll Taxes</li> <li>• Anonymous Contribution</li> </ul>
Additional Address Book entries for Opted Out Committees	<ul style="list-style-type: none"> <li>• Miscellaneous Cash Contributions \$100 and under</li> <li>• Miscellaneous In-Kind Contributions \$100 and under</li> <li>• Miscellaneous Cash Expenditures \$100 and under</li> <li>• Miscellaneous Accounts Payable \$100 and under</li> <li>• Miscellaneous Lost or Returned Check \$100 and under</li> <li>• Miscellaneous Personal Expenditures \$100 and under</li> <li>• Miscellaneous Return/Refund of Contribution \$100 and under</li> </ul>

1. Begin typing any part of the name in the *Contributer/Payee* name field.
  - a. If the name appears on the dropdown list, select the entry by clicking on it.
  - b. If the name does not appear in the list, click the **Add** button located to the right of the *Contributor/Payee* name field. This will open the Add/Edit Address Book entry page to create a new Address Book entry. See **Add an Address Book Entry** on *page 21* for more information.
  
2. After selecting or adding the name associated with the transaction, the occupation (if it is a contribution from an individual) and address information from the Address Book will display in the box to the right of the Contributor/Payee name field. If the information needs to be updated, click on the **Edit** button to the right of the *Contributor/Payee* name field. Make the necessary changes to the Address Book entry and click the **Save** button. The user returns to the *Transaction Add/Edit* page and the updated information displays.
  - a. If aggregate contributions from a contributor exceeds \$100, the address of the contributor is required. If aggregate contributions from an Individual or the Candidate’s Immediate Family members’ during the calendar year exceed \$100, the occupation, and employer information is also required.
  - b. If aggregate expenditures to a payee exceed \$100 during a calendar year, then the address (city and state) for the payee is required.

**Payment Method**

Select the payment method used for a cash expenditure, non-exempt loan payment, or other disbursement transaction by clicking on the down arrow and choosing the appropriate value from the list. The choices are:

**!** Expenditures in the form of currency (including cash) directly from the campaign account are prohibited.

Payment Method	Description
Check	A payment made by the committee using a committee check, cashier’s check, money order, or counter check.
Credit Card	A payment made by the committee using a committee credit card.
Debit Card	A payment made by the committee using a committee debit card.
Electronic Check	A payment electronically accessed by the vendor.
Electronic Funds Transfer	A payment made by electronic transfer.

**Check #**

Enter the number of the check issued by the committee. This field is grayed out when the payment method is anything other than check.

**Amount**

Enter the amount of the transaction without the dollar sign. Use a decimal point if there are cents to report.

**Calendar Year Aggregate**

If the committee opted in to the System Calculated Aggregate, then this field will be grayed out. For committee’s who opt-out of the System Calculated Aggregate, the calendar year aggregate for the contributor or payee must be entered, excluding ‘miscellaneous \$100 and under’ entries. See *page 18* for information regarding opting out of using the system aggregate calculation function.

**Interest Rate**

Enter the interest rate associated with a loan received by the committee or a loan made to another entity by the committee. If there is no interest rate attached to the loan, enter 0 (zero).

**Repayment Schedule**

Enter the repayment schedule associated with a loan received by the committee or a loan made to another entity by the committee. If there is no repayment schedule, enter *“payable when funds available”*.


**Description**

A written description of the purpose of an Expenditure or In-Kind Contribution may be provided in lieu of selecting a purpose from the dropdown list of transaction purposes.

A description is REQUIRED for the following:
Expenditures or In-Kind contributions <i>(when using the General Operational Expenses, Public Office Holder Expenses or Travel Expenses purpose)</i>
Miscellaneous Other Receipt
Miscellaneous Other Disbursement
Cash Balance Adjustment
Personal Expenditure Balance Adjustment


**Occupation Letter Date**

If the occupation and employer information is not obtained when a contribution is received, enter the date that the committee sent a letter or email requesting occupational information from the contributor.

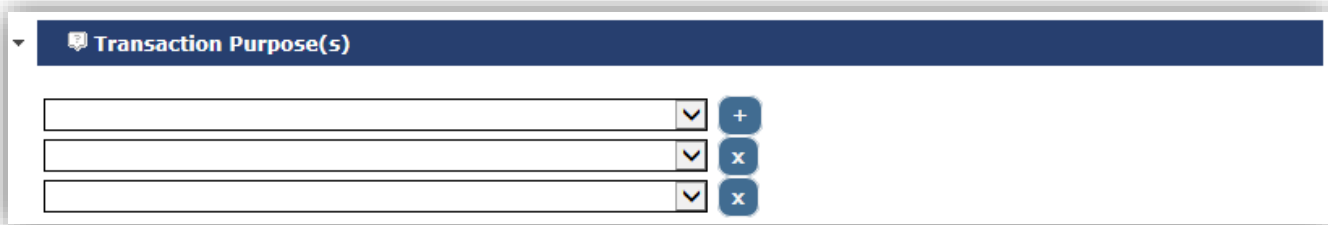
-  The committee has 7 calendar days from the contribution receipt date to send a letter or email requesting occupational information per ORS 260.085.

**Notes**

Use the Notes field to record additional information about a transaction.

-  The Notes field is intended to document notes, comments, or remarks as determined relevant and useful by the committee. Do not use this section to enter information required for the *Description* field.

**Transaction Purpose(s)**





For an *Expenditure* type or an *In-kind Contribution* sub type, select one or more **Transaction Purpose(s)** that best describes the use of funds, or the goods or services given to the campaign. Here are the following functions:

- Select a **Transaction Purpose** description by clicking on the down arrow and choose the desired purpose from the list.
- Add a row for an additional purpose by clicking on the plus (+) symbol to the right of the first row.
- Delete a row by clicking on the box with an (X) to the right of the row to be deleted.

A description for each purpose is provided in the table below:

Purpose of the Transaction	Description
<b>Broadcast Advertising</b>	Expenditures for radio and television advertising.
<b>Cash Contribution</b>	Contributions made to other committees or organizations.
<b>Fundraising Event Expenses</b>	Expenditures associated with holding a fundraiser, including payments to restaurants, hotels, caterers, other food and refreshment vendors, entertainers and speakers.
<b>General Operational Expenses</b>	General campaign operating expenses, including filing fees, bank service charges, purchase or rental of office equipment and furniture for the campaign and office supplies. Additional information is required to be entered in the <b>Description</b> field (e.g., office supplies, furniture).

Purpose of the Transaction	Description
<b>Interest Payment</b>	Interest paid to a financial institution or other lender for a loan made to the committee.
<b>Literature, Brochures, Printing</b>	Expenditures for the preparation and production of campaign literature and printed solicitations, including expenditures for mailing lists, design, photography, copy, layout, printing and reproduction.
<b>Loan Extended</b>	An expenditure made by a committee that is a loan to another committee or organization. The committee must add and file a <i>Miscellaneous Account Receivable</i> transaction type for the outstanding loan amount. See <i>page 75</i> for more information on this transaction.
<b>Management Services</b>	Includes fees and commissions paid to campaign management companies, agents and campaign consultants.
<b>Newspaper and Other Periodical Advertising</b>	Expenditures for advertising in newspapers, periodicals and other publications.
<b>Other Advertising</b>	Expenditures related to the production and purchase of advertising on billboards, yard signs, voters’ pamphlets, websites, and campaign paraphernalia such as buttons, bumper stickers, t-shirts, etc.
<b>Petition Circulators</b>	Payments made to individuals for collection of signatures on a petition, or to a company that pays petition circulators.
<b>Postage</b>	Expenditures for stamps, postage and direct mail services.
<b>Preparation and Production of Advertising</b>	Payments related to the preparation or production of broadcast, newspaper or other periodical advertising.
<b>Public Office Holder Expenses</b>	Expenditures related to allowable public office holder expenses such as gifts of nominal value, conference registration fees, membership dues, constituent services, staff wages, office rent, mileage, gas, and travel. Additional information is required to be entered in the <b>Description</b> field (e.g., conference registration fee, mileage).
<b>Reimbursement for Personal Expenditures</b>	<p>Payments made to a person for reimbursement of a personal expenditure made on behalf of the committee. The personal expenditure made by the person must be reported as a separate transaction.</p> <p> After filing a Reimbursement of Personal Expenditure purpose, the entire amount of the transaction is subtracted from the committee’s outstanding personal expenditure balance on the account summary.</p> <p> Do not use multiple transaction purposes when using the purpose <i>Reimbursement for Personal Expenditures</i>.</p>

Purpose of the Transaction	Description
<b>Surveys and Polls</b>	Expenditures related to polls, reports on election trends, voter surveys, telemarketing, telephone banks, etc.
<b>Travel Expenses</b>	Expenditures related to travel. Additional information is required to be entered in the <b>Description</b> field (e.g., lodging, airfare, meals, gas, mileage, etc.).
<b>Utilities</b>	Expenditures for utilities (e.g., telephone, Internet access, electricity, etc.)
<b>Wages, Salaries, Benefits</b>	Expenditures related to campaign staff payroll (including wages, employment taxes, insurance, payments to temporary employment agencies, etc.)

### Transaction Association

An *associated transaction* is a transaction that is connected to, or dependent upon, another transaction that has previously been entered in ORESTAR.

**ex** See an example of associated a transaction on *page 71* in Frequently Asked Questions.

**!** Do not associate a cash expenditure transaction to a transaction with a personal expenditure for reimbursement sub type.

### Column Headings for Transaction Association

Example:

Transaction Association				
Unassociate:	Associate:	Complete:	Associated Transactions:	Balance
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cash Expenditure for \$52.00 from US Post Office on 06/10/2016 (2199504)	\$52.00
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cash Expenditure for \$27.40 from US Post Office on 06/10/2016 (2199534)	\$.40

#### Unassociate

This is the default selection when information appears in the transaction association table.

#### Associate

Select *Associate* when the amount is a partial receipt or payment towards the original transaction.

#### Complete

Select *Complete* when the amount is a full receipt or payment for a previously entered transaction in the list

#### Associated Transactions

Previously entered transactions including the transaction type, amount, Contributor/Payee, transaction date, and transaction ID.

**Search (Button)**

This button allows you to find transactions if the system does not populate the correct transaction to associate.

**Balance**

The balance remaining to be associated.

The following table provides examples of associated transaction sub types:

\* These transaction sub types require an association and cannot be added in ORESTAR unless the user selects an association.

<b>If the previously entered Transaction Sub type is:</b>	<b>Then select this Association Sub type:</b>
Account Payable	Account Payable Rescinded*
Account Payable	Cash Expenditure
Account Payable	In-Kind/Forgiven Account Payable*
Cash Expenditure	Lost or Returned Check*
Cash Contribution	Return or Refund of Contribution*
Loan Received (Non-Exempt)	Loan Forgiven (Non-Exempt)*
Loan Received (Exempt)	Loan Payment (Exempt)*
Loan Received (Non-Exempt)	Loan Payment (Non-Exempt)*
Miscellaneous Account Receivable	Items Sold at Fair Market Value
Miscellaneous Account Receivable	Miscellaneous Other Receipt
Miscellaneous Account Receivable	Refunds and Rebates

**Completing the Transaction Association**

The system attempts to identify all possible associations and displays them in the Transaction Association section. See *page 71* for an example of completing an association when an expenditure pays multiple account payables.

1. The default selection for each transaction is **Unassociate**.
  - a. If the current transaction is a *partial* receipt or payment for a previously entered transaction in the list, click on the **Associate** button for that transaction.
  - b. If the current transaction is *full* receipt or payment for a previously entered transaction in the list, click on the **Complete** button.
2. If a previously entered transaction that should be associated with the current transaction does not appear in the transaction association list, click on **Search**.

- a. The *Transaction Search* page opens. Enter appropriate search criteria for the desired transaction and click on **Search**.
- b. The search results display in the associated transaction list, allowing the user to associate or complete the transaction.

## In-Kind or Independent Expenditure Information

Indicator *	Support *	Committee/Candidate/Measure *	Amount *
Independent	Support		
	Oppose		

Identify the candidate(s) or committee(s) supported or opposed by the expenditure, if the expenditure is an In-Kind contribution to another candidate or committee, or an independent expenditure for a communication supporting or opposing a candidate or measure.

Click on the **In-Kind or Independent Expenditure Information** bar and the following displays:

- Add a row if the expenditure is supporting or opposing multiple candidates and/or measures by clicking on the plus (+) button.
- Delete a row by clicking on the box with an (X) to the right of the Amount field in the desired row.

### Column Headings for In-Kind or Independent Expenditure Information

#### Indicator

The indicator list provides two options: *In-Kind* or *Independent*. See the Campaign Finance manual for definitions of each.

#### Support

This information is only required if the Indicator selection is *Independent*. Click the down arrow and choose either *Support* or *Oppose*.

#### Committee Name

For an *In-Kind* expenditure that is benefiting a candidate or committee, begin typing any portion of the name of the candidate or committee. A list will appear with possible matches. Select the appropriate candidate or committee by clicking on the name in the list.

For an *Independent* expenditure supporting or opposing a candidate or measure, do not select from the list, but instead enter the candidate’s name or measure information (e.g., “John Smith”, “Measure 29”).

#### Amount

Enter the amount of the expenditure that supported or opposed the candidate, committee or measure.

## Co-Signer Obligation

- ✓ Each endorser or guarantor of an exempt or non-exempt loan received is considered a contributor and must be reported, unless the endorser or guarantor is the candidate’s spouse. Click on the **Co-Signer Obligation** bar, then the name and amount boxes will appear.
- ✓ Enter the name of the endorser or guarantor and the amount for which the person agreed to be liable in a written agreement.

To add an additional row, click on the box containing a plus (+) symbol to the right of the *Amount* field in the first row. To delete a row, click on box containing an (X) to the right of the *Amount* field of the row.

## Save a Transaction

The following fields must be entered prior to saving a transaction:

- Transaction Date
- Transaction Type
- Transaction Sub Type
- Contributor/Payee (if required based on sub type), and
- Amount

A transaction can be saved from the *Transaction Add/Edit* page by clicking either the **Save/Exit**, **Save/Add**, or **Validate** button. Remember that a saved transaction must be validated, which can also be done from the *Transaction Queue* page. For more information on validating a transactions, see the next section **Validate a Transaction**.

## Validate a Transaction

*Transaction Validation page*

Transactions must be validated prior to filing. This process helps to ensure the required transaction information is entered and, if necessary, provide a message to the user. A transaction can be validated from either the *Transaction Add/Edit* page individually or from the *Transaction Queue* page individually or as a batch.

### Buttons on *Transaction Validation* page

#### Add

Opens the *Transaction Add/Edit* page to add a new transaction.

#### Return to Transaction Queue


Returns to the *Transaction Queue* page.


#### File

Opens the *Attestation* page where the candidate, treasurer, alternate transaction filer, or independent expenditure filer attests to the information. Note: To file the transaction(s) immediately, the user must click the file button on the *Attestation* page.

#### File/Due

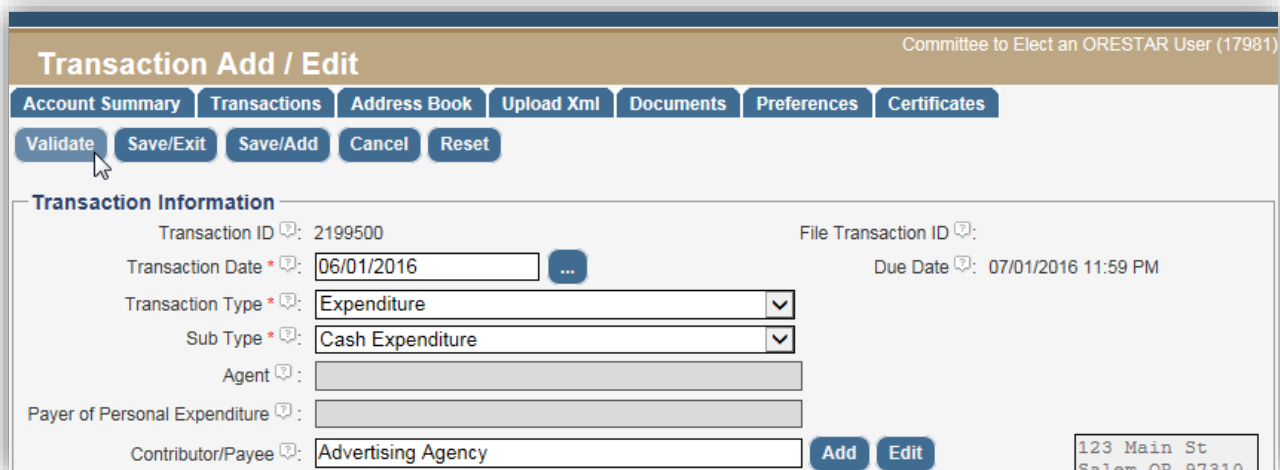
Opens the *Attestation* page where the candidate, treasurer, alternate transaction filer, or independent expenditure filer attests to the information. Note: To file the transaction(s) at approximately 11:59:00 PM on the system calculated due date, the user must click the file button on the *Attestation* page.

 After selecting either *File* or *File When Due*, the transaction will no longer display in the *Transaction Queue*. The transaction can be found using the Search feature. See *page 49* for more information.

 If any part of a transaction, including the Address Book entry, is edited after validation and prior to filing, the transaction must be re-validated prior to filing.

### Complete a Validation

1. After completing data entry in the *Transaction Add/Edit* page, click the **Validate** button.

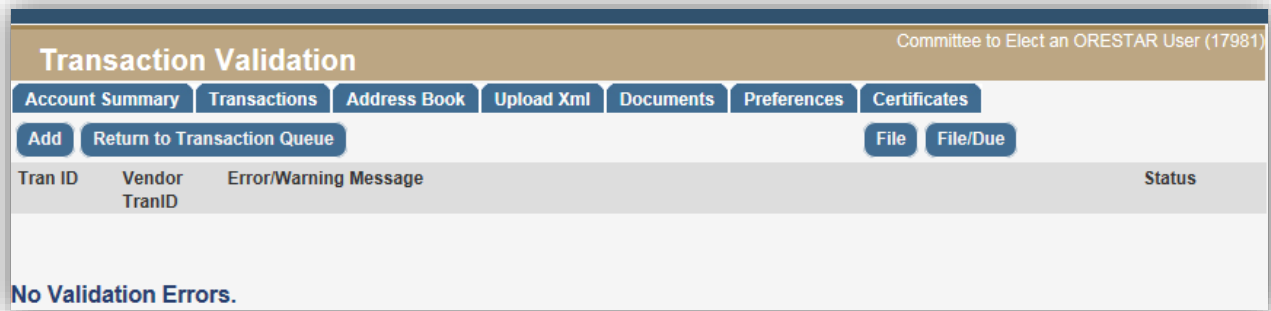


The screenshot shows the 'Transaction Add / Edit' interface for a 'Committee to Elect an ORESTAR User (17981)'. The page has a navigation bar with tabs: Account Summary, Transactions, Address Book, Upload Xml, Documents, Preferences, and Certificates. Below the navigation bar are buttons: Validate, Save/Exit, Save/Add, Cancel, and Reset. The 'Validate' button is highlighted with a mouse cursor. The main section is titled 'Transaction Information' and contains the following fields:


- Transaction ID: 2199500
- Transaction Date: 06/01/2016
- Transaction Type: Expenditure
- Sub Type: Cash Expenditure
- Agent: (empty field)
- Payer of Personal Expenditure: (empty field)
- Contributor/Payee: Advertising Agency
- File Transaction ID: (empty field)
- Due Date: 07/01/2016 11:59 PM
- Address: 123 Main St, Salem, OR 97310

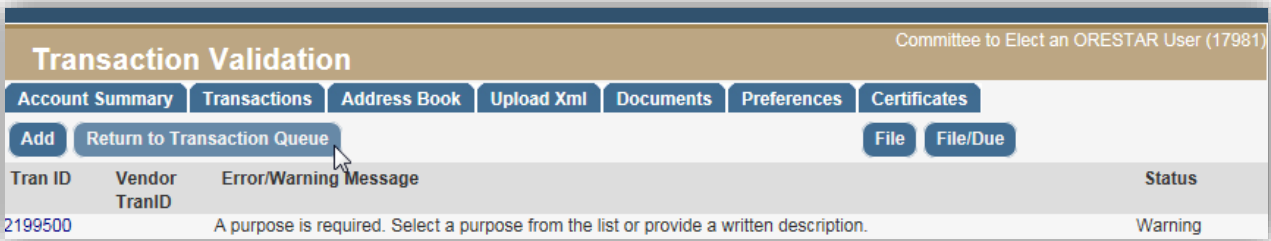
At the bottom right of the form are 'Add' and 'Edit' buttons.

a. The transaction is saved and the *Transaction Validation* page opens. If there are no validation errors, the message will state, **“No Validation Errors.”**

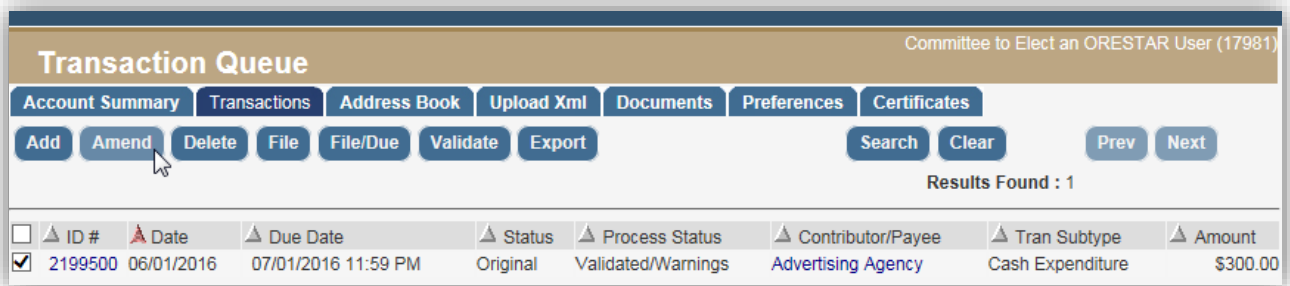


b. If an Error/Warning message appears that requires a correction, click the *Tran ID* number. This will open the *Transaction Add/Edit* screen.

 If multiple transactions need to be amended, return to *Transaction Queue* and sort by **‘Process Status’**. Amend the transactions individually with the **‘Validated/Warnings’** process status.



c. Check the box next to the transaction(s) that need to be edited, and click the **Amend** button:



d. The *Transaction Add/Edit* page will open. Make the necessary edits and click the **Validate** button again.

2. To validate transactions from the *Transaction Queue* page, select one or more transactions from the list and click on the **Validate** button.

ID #	Date	Due Date	Status	Process Status	Contributor/Payee	Tran Subtype	Amount
2199569	06/01/2016	07/01/2016 11:59 PM	Original	New	Alex Monroe	In-Kind Contribution	\$225.30
2199573	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Costco	Personal Expenditure for Reimbursement	\$431.88
2199574	06/01/2016	07/01/2016 11:59 PM	Original	New	Jack Smith	Cash Expenditure	\$431.88
2199534	06/10/2016	07/11/2016 11:59 PM	Original	New	US Post Office	Cash Expenditure	\$27.40


a. The *Transaction Validation* page will open and with any validation messages. See the next section on **Validation Error/Warning Messages** for more information.

Tran ID	Vendor TranID	Error/Warning Message	Status
2199574		Transaction may be considered late.	Warning
2199534		When this transaction is filed it may cause already filed transactions to be disclosed that are currently filed under a miscellaneous category. These transactions will be revalidated and may be found to be insufficient.	Informational

## Validation Error/Warning Messages

The *Transaction Validation* page displays error messages associated with the transaction or transactions selected for validation. There are three types of messages:

Status	Description
<b>Error</b>	An error message prevents the transaction from being filed. The insufficiency must be fixed before the transaction can be filed.
<b>Warning</b>	A warning message can either: (1) identify missing information that is required by statute and must be supplied for the transaction to be considered sufficient, or (2) identify that a transaction may be late. A warning message does not prevent the transaction from being filed.
<b>Informational</b>	An informational message can either identify missing information that is required by administrative rule, or provide additional information about the transaction. An informational message does not prevent the transaction from being filed.

 No further action is required for a *Warning Message* that states the **“Transaction may be considered late.”** This message is to inform the user and validate that the date was entered correctly. Other corrections may be necessary if other error or warning messages are generated.

## Amend a Transaction (Prior to Filing)

Transactions that have not yet been filed will appear on the *Transaction Queue* page. A transaction can be edited prior to filing. To edit a transaction that has not been filed, proceed with the following:

The screenshot shows the 'Transaction Queue' page for 'Committee to Elect an ORESTAR User (17981)'. The page has a navigation bar with tabs: Account Summary, Transactions, Address Book, Upload Xml, Documents, Preferences, and Certificates. Below the tabs are buttons: Add, Amend, Delete, File, File/Due, Validate, Export, Search, Clear, Prev, and Next. The 'Amend' button is highlighted with a mouse cursor. Below the buttons, it says 'Results Found : 4'. The main table lists transactions with columns: ID #, Date, Due Date, Status, Process Status, Contributor/Payee, Tran Subtype, and Amount.

<input type="checkbox"/>	▲ ID #	▲ Date	▲ Due Date	▲ Status	▲ Process Status	▲ Contributor/Payee	▲ Tran Subtype	▲ Amount
<input type="checkbox"/>	2199500	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Advertising Agency	Cash Expenditure	\$300.00
<input checked="" type="checkbox"/>	2199502	06/10/2016	07/11/2016 11:59 PM	Original	Validated	Homer Simpson	Cash Contribution	\$50.00
<input type="checkbox"/>	2199503	06/10/2016	07/11/2016 11:59 PM	Original	Validated	The Electric Company of Oregon	Cash Expenditure	\$100.00
<input type="checkbox"/>	2199504	06/10/2016	07/11/2016 11:59 PM	Original	Validated	US Post Office	Cash Expenditure	\$52.00

1. Access the *Transaction Queue* by clicking on the **Transaction** tab.
2. Select the transaction to edit by clicking on the box to the left of the transaction ID #.
3. Click the **Amend** button.
4. Make the desired changes. If information associated with the Address Book entry needs amending, click on the **Edit** button to the right of the *entry that needs amending*, make the edits, then click Save to return to the *Transaction Add/Edit* page.
5. Save the changes by clicking either the **Validate**, **Save/Exit** or **Save/Add** button.



For transactions uploaded through the XML process, the Elections Division advises not to edit transactions in ORESTAR. Editing uploaded transactions will cause the original data to be out of sync with the data in ORESTAR. This could cause problems with any subsequent amendments.

## Delete a Transaction (Prior to Filing)

Transactions that are deleted *prior to filing* are removed from the system permanently. History of the transaction is not saved and cannot be retrieved.

To delete a transaction that has not yet been filed, proceed with the following:

The screenshot shows the 'Transaction Queue' page for 'Committee to Elect an ORESTAR User (17981)'. The page has a navigation bar with tabs: Account Summary, Transactions, Address Book, Upload Xml, Documents, Preferences, and Certificates. Below the tabs are buttons: Add, Amend, Delete, File, File/Due, Validate, Export, Search, Clear, Prev, and Next. The 'Delete' button is highlighted with a mouse cursor. Below the buttons, it says 'Results Found : 2'. The main table lists transactions with columns: ID #, Date, Due Date, Status, Process Status, Contributor/Payee, Tran Subtype, and Amount.

<input type="checkbox"/>	▲ ID #	▲ Date	▲ Due Date	▲ Status	▲ Process Status	▲ Contributor/Payee	▲ Tran Subtype	▲ Amount
<input checked="" type="checkbox"/>	2199500	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Advertising Agency	Cash Expenditure	\$300.00
<input type="checkbox"/>	2199502	06/10/2016	07/11/2016 11:59 PM	Original	Validated	Homer Simpson	Cash Contribution	\$50.00

1. Access the *Transaction Queue* by clicking on the **Transactions** tab.
2. Select the transaction(s) to be deleted by clicking on the box to the left of the transaction number.
3. Click the **Delete** button.
4. Confirm the deletion by clicking **Yes** on the pop-up box.

**i** A *File When Due* transaction that is deleted prior to its filing due date (or deadline), is also removed from the system permanently.

## File a Transaction

Once a transaction is validated and cleared of any error messages, the next step is to **file** the transaction. There are two options when filing a transaction: *File* or *File When Due* (the button is named, "File/Due"). "File" files the transaction immediately. When using "File When Due" the transaction will not be filed until the system calculated due date – approximately one hour before the 11:59:00 PM statutory deadline.

**i** If there are multiple validated transactions ready to be filed, it is preferable to return to the *Transaction Queue* to file in a single group.

1. Validated transactions can be filed from either the *Transaction Validation* page or the *Transaction Queue*.

<input type="checkbox"/>	▲ ID #	▲ Date	▲ Due Date	▲ Status	▲ Process Status	▲ Contributor/Payee	▲ Tran Subtype	▲ Amount
<input type="checkbox"/>	2199500	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Advertising Agency	Cash Expenditure	\$300.00
<input type="checkbox"/>	2199502	06/10/2016	07/11/2016 11:59 PM	Original	Validated	Homer Simpson	Cash Contribution	\$50.00
<input checked="" type="checkbox"/>	2199503	06/10/2016	07/11/2016 11:59 PM	Original	Validated	The Electric Company of Oregon	Cash Expenditure	\$100.00
<input checked="" type="checkbox"/>	2199504	06/10/2016	07/11/2016 11:59 PM	Original	Validated	US Post Office	Cash Expenditure	\$52.00

- a. To file one or more transactions from the *Transaction Queue* page check the box to the left of the transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of ID#.
  - b. Click **File** or **File/Due**
2. To file from the *Transaction Validation* page, click either the **File** or **File/Due** button.

Tran ID	Vendor	Error/Warning Message	Status

No Validation Errors.

3. The *Attestation* page opens. Only candidates, treasurers, alternate transaction filers, and independent expenditure filers can file transactions.
4. Read the attestation statement and if agreed, click on the **File** button.
5. The user returns to the *Transaction Queue* page and the filed transactions no longer display in the queue. *Filed* transactions can be found through the Search feature. See *page 49* for more information.
6. After the transactions are filed, an email is sent to the candidate, treasurer, alternate transaction filer, correspondence recipient, and independent expenditure filer, where applicable. The email subject line is "Filing Complete" and includes a PDF attachment of the Transaction Filing Report. This report contains a list of the filed transactions and includes any validation errors/messages associated with each transaction.

**Attestation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

You have selected 2 transactions to file with the Secretary of State, Elections Division.

When the transactions have been successfully filed, you will receive a copy of the filing report via E-Mail.

By clicking the File button below I, ORESTAR User, am attaching my electronic signature and hereby certify that all information associated with the transactions I am filing is true and correct.

If you do not agree to the above statement, click on Cancel to stop the filing.

File Cancel

Other users associated with a committee, including a data entry person or vendor, can also access this report by clicking on the **Documents** tab.

- i** Each time you click **File** to file validated transactions, a Transaction Filing Report is generated and emailed. Filing transactions in groups from the *Transaction Queue*, rather than filing them one at a time, keeps documents to a minimum.

- !** If clicking the **File/Due** button, a Transaction Filing Report will be generated and emailed *after* ORESTAR automatically files the transaction on its due date.

## Amend a Transaction with the 'File When Due' Process Status

---

A transaction with a process status of **File When Due** may be edited, or amended. When the transaction is amended, the process status changes back to "New" where it must be validated and filed again.

To amend a transaction with a process status of **File When Due**, proceed as follows:

1. Access the *Transaction Queue* page by clicking on the **Transactions** tab.
2. Click the **Search** button. The *Search* page will open.
3. Enter the transaction ID or other search criteria (e.g., select **File When Due** from *Process Status* dropdown).
4. Click the **Search** button. The search results, if any, display on the *Transaction Queue* page.
5. Check the box to the left of the transaction ID # and click the **Amend** button. The *Transaction Add/Edit* page will open.
6. Make the desired changes. If information associated with the Address Book entry needs to be amended, click on the **Edit** button to the right of the entry that needs amending. See **Edit an Address Book Entry**, page 24 for more information.
7. Click the **Validate** button and make any required corrections based on Validate Error/Warning message.
8. From the Transaction Validation page, file the transaction either individually or in a batch:
  - a. Individually: Click the **File/Due** button or, you may click the **File** button instead, if you decide to file the transaction immediately.
  - b. Batch: If you have multiple transactions that need to be filed, click the **Return to Transaction Queue** button. When the *Transaction Queue* page opens, check the box next to the transactions to file, and click the **File/Due** button. You may click the **File** button instead, if you decide to file the transaction immediately.
9. After clicking either the **File/Due** or **File** button, the *Attestation* page will open.
10. Read the attestation and click the **File** button to attest to the change(s) made to the transaction. To cancel the filing process, click the **Cancel** button and return to the *Transaction Queue* page.

## Amend a Filed Transaction

---

To make a change to a filed transaction, proceed with the following:

1. Access the *Transaction Queue* page by clicking on the **Transactions** tab.
2. Click the **Search** button.
3. Enter the transaction ID or other search criteria (such as a portion of the name associated with the transaction).
4. Click the **Search** button. The search results, if any, display on the *Transaction Queue* page.
5. Check the box to the left of the transaction ID # of the desired transaction and then click the **Amend** button.
6. Make the desired changes. If information associated with the Address Book entry needs amending, click on the **Edit** button to the right of the entry that needs amending, make the edits, then click **Save** to return to the *Transaction Add/Edit* page.
7. Validate and File the amended transaction in the same manner as an original transaction.



Committees using the XML upload process are advised not to amend filed transactions directly in ORESTAR. Amending uploaded transactions will cause the original data to be out of sync with the data in ORESTAR. This could cause problems with any subsequent amendments.

## Delete a Filed Transaction

---

A filed transaction may be deleted. The history of a deleted transaction remains in the system and available for public search, however, the status will display the deleted status. Note that the transaction must be filed after it has been selected for deletion.

To delete a filed transaction, proceed with the following:

1. Access the *Transaction Queue* page by clicking on the Transaction tab.
2. Click on **Search**.
3. Enter the transaction ID or enter other search criteria (such as a portion of the name associated with the transaction).
4. Click on **Search**. The search results, if any, display on the Transaction Queue page.
5. Select the transaction(s) to be deleted and click the **Delete** button.
6. A second transaction is created and will display on the *Transaction Queue* with a status of **Deleted**. The original transaction will remain for history purposes.
7. Validate and File the deleted transaction in the same manner as an original transaction.

## Search for Transactions

*Transaction Search page*

The *Transaction Search* page is accessed by clicking the **Search** button on the *Transaction Queue* page. It allows a user to search for transactions associated with the committee.

1. Enter the desired search criteria and click on **Search**.

**i** If you click on **Search** without entering any criteria, all transactions will display in the *Transaction Queue*. The search results will only display 5,000 transactions if a committee has more than this amount.

2. The search results, if any, display on the *Transaction Queue* page.

**i** On the *Transaction Search* page, select **Show Expired Entries** to include expired transactions in the search results (i.e., transactions that have subsequently been amended or deleted). Expired transactions are identified on the search results page by '(Expired)' in the Process Status column.

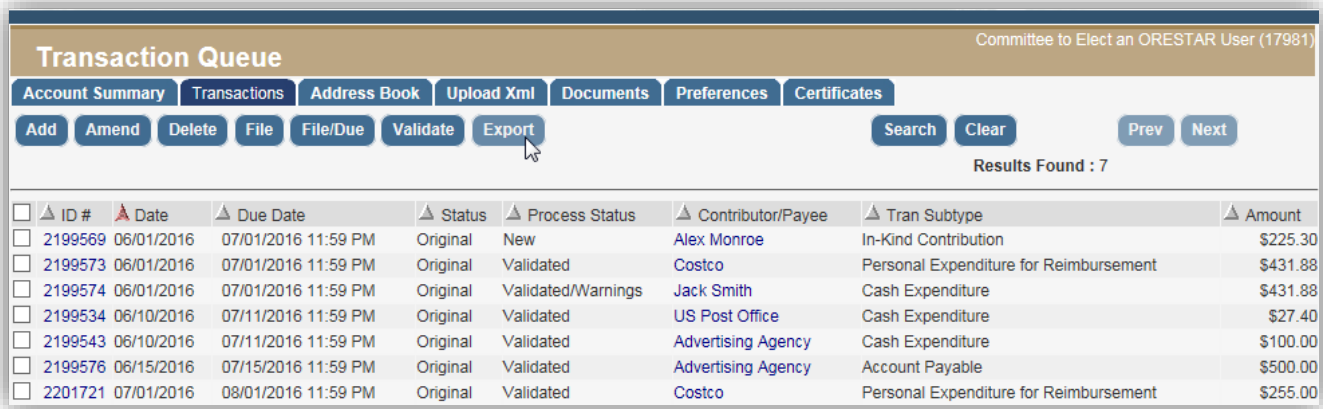
Other helpful Search tips:

- To view detailed transaction information, click on the **ID #** of the desired transaction.
- To view Address Book information for a transaction, click on the *Contributor/Payee* name of the desired transaction.
- From the search results page, the user may edit or delete a transaction, export the search results to an Excel spreadsheet, or search for another transaction.

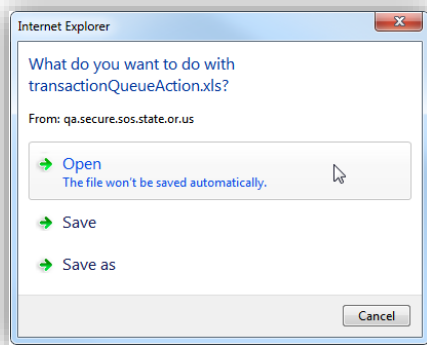
- If more than 50 transactions match the search criteria, click the **Prev** or **Next** buttons to move between pages.
- Click on **Clear** to remove the search results from the *Transaction Queue* page and restore the page to its initial display, showing only transactions that have not yet been filed with the Elections Division.

## Export Transactions

Transactions can be exported from the *Transaction Queue* page to an Excel spreadsheet. The **Results Found** provides a count of transactions in the queue. A maximum 5,000 transactions can be exported at a time from ORESTAR. If the **Results Found** exceeds 5,000 records, it is recommended that you modify the search criteria and export the results multiple times. The multiple exported Excel sheets can be later be copied and pasted into a single Excel spreadsheet.



1. Access the *Transaction Queue* page by clicking on the Transaction tab.
2. Click the **Search** button. The Search screen will open.
3. Enter the desired criteria to search.
4. Click the **Search** button. The search results display in the *Transaction Queue* page.
5. Click the **Export** button.
6. When the pop-up box appear, choose to Open, Save, or Save the file.



# Filing Transactions by Type

This section provides instructions on how to file a transaction by its type or sub type. For more general information about how to add, amend, or delete a transaction, review the *Transactions Management* section of this manual starting on page 29.

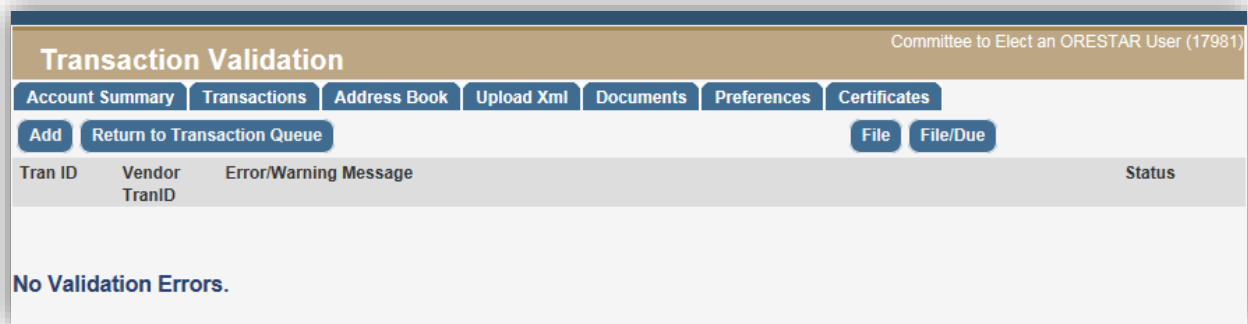
## Cash Contribution

A contribution received by the committee as cash, check or any legal instrument redeemable as currency, transmitted via physical or electronic means.

1. From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
2. Enter:

<b>Transaction Date</b>	The date the money was received in the committee's physical custody.
<b>Transaction Type</b>	Contribution
<b>Sub Type</b>	Cash Contribution
<b>Contributor/Payee</b>	Type the name of who provided the cash contribution, and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Amount</b>	Dollar amount received.

3. Click the **Validate** button.
4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.



**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.


5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added *and* validated, click **Return to Transaction Queue**.
  - b. To file one or more transactions from the *Transaction Queue* page, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on its due date.
7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button which will return you to the *Transaction Queue* page. Clicking on either button will return you to the *Transaction Queue* page.



8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The reports is also available in the **Documents** tab.

## In-Kind Contribution

In-kind is defined a good or service, other than money, having monetary value. The value of this contribution is based on the fair market value of the good or service.

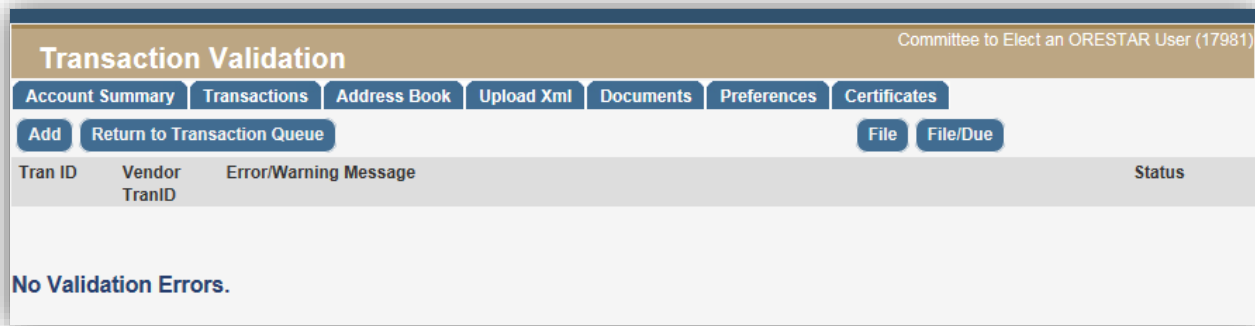
-  An expenditure by any person from personal funds on behalf of the candidate or committee is an in-kind contribution to the candidate or committee if the person does not expect to be reimbursed.

- From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
- Enter:

<b>Transaction Date</b>	The date the committee first has knowledge of the in-kind contribution.
<b>Transaction Type</b>	Contribution
<b>Sub Type</b>	In-Kind Contribution
<b>Contributor/Payee</b>	Type the name of who provided the in-kind contribution and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Amount</b>	The fair market value of the contributed goods or service.
<b>Description</b>	May be required based on Transaction Purpose(s) selected.
<b>Transaction Purpose(s)</b>	Select the appropriate purpose(s).

- Click the **Validate** button.

4. The *Transaction Validation* page opens and will report any errors or warnings. If necessary, make required corrections and re-validate.



**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
- After the transactions have been added and validated, click **Return to Transaction Queue** button.
  - To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on its due date.
7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button, which will return you to the *Transaction Queue* page. Clicking either button will return you to the *Transaction Queue* page.

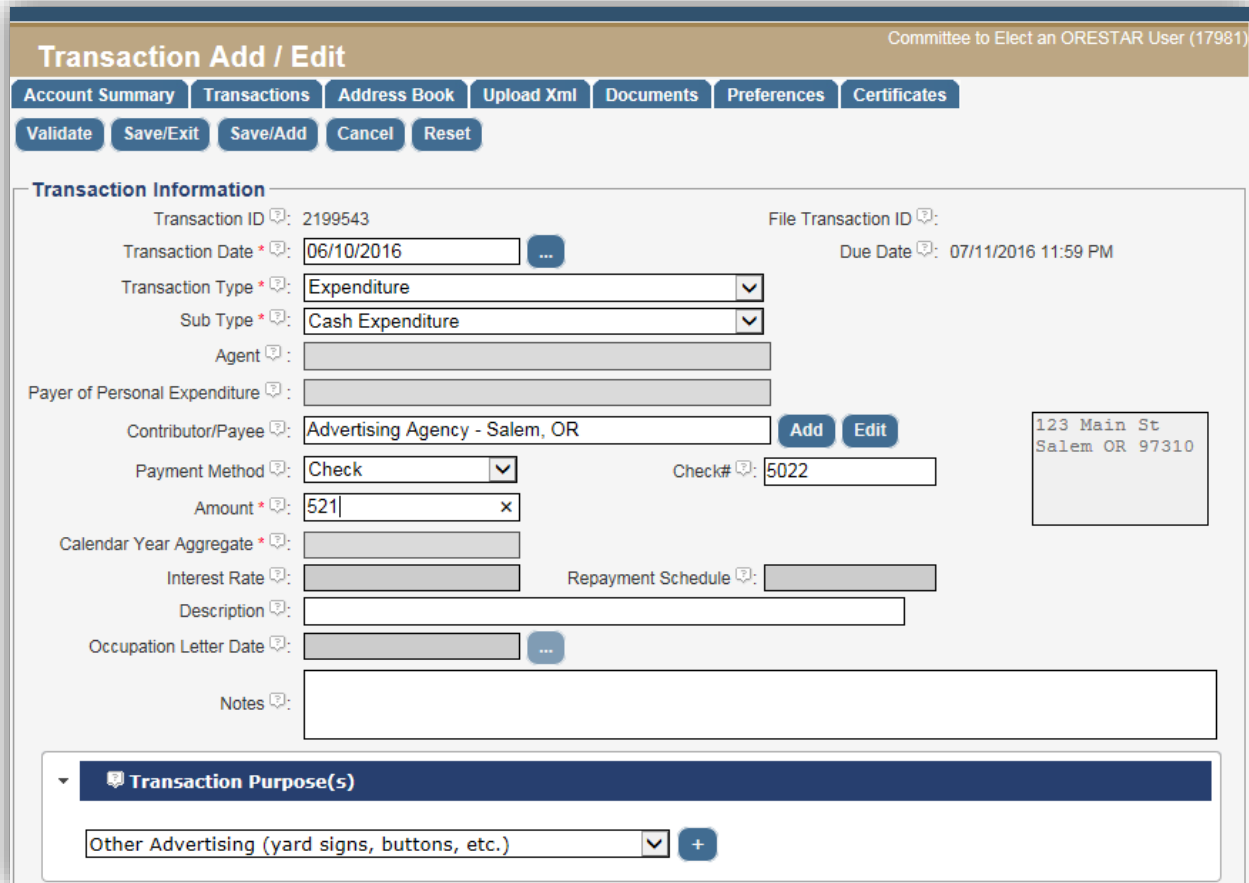


8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.

# Cash Expenditure

An expenditure made by the committee via check, credit card, debit card or any means of electronic transmission.

 Also see *Personal Expenditures for Reimbursement*, page 57.



**Transaction Add / Edit** Committee to Elect an ORESTAR User (17981)

Account Summary | Transactions | Address Book | Upload Xml | Documents | Preferences | Certificates

Validate | Save/Exit | Save/Add | Cancel | Reset

**Transaction Information**

Transaction ID ⓘ: 2199543 File Transaction ID ⓘ:  
 Transaction Date \* ⓘ: 06/10/2016 Due Date ⓘ: 07/11/2016 11:59 PM  
 Transaction Type \* ⓘ: Expenditure  
 Sub Type \* ⓘ: Cash Expenditure  
 Agent ⓘ:   
 Payer of Personal Expenditure ⓘ:   
 Contributor/Payee ⓘ: Advertising Agency - Salem, OR Add Edit  
 Payment Method ⓘ: Check Check# ⓘ: 5022  
 Amount \* ⓘ: 521 123 Main St  
Salem OR 97310  
 Calendar Year Aggregate \* ⓘ:   
 Interest Rate ⓘ:  Repayment Schedule ⓘ:   
 Description ⓘ:   
 Occupation Letter Date ⓘ:  ...  
 Notes ⓘ:

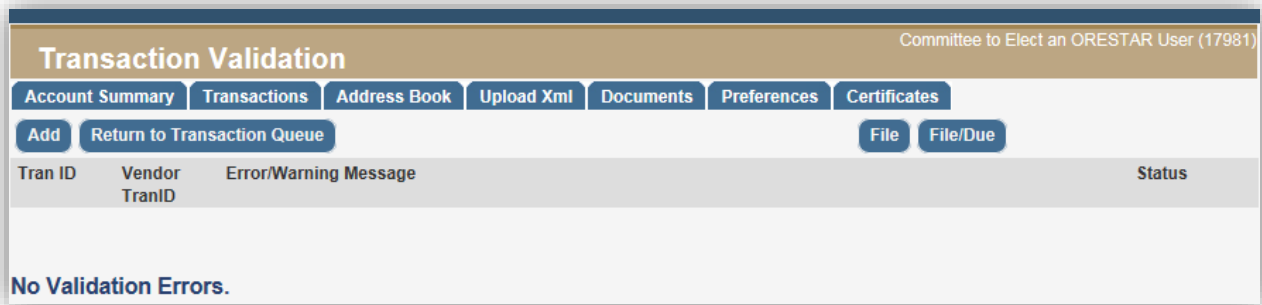
**Transaction Purpose(s)**

Other Advertising (yard signs, buttons, etc.) ⓘ +

1. From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
2. Enter:

<b>Transaction Date</b>	The date written on the check, the date the committee's credit or debit card was used, or the date of the Electronic Funds Transfer (EFT).
<b>Transaction Type</b>	Expenditure
<b>Sub Type</b>	Cash Expenditure
<b>Contributor/Payee</b>	Type the payee where committee funds were spent. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Payment Method</b>	Select method used to pay expenditure from dropdown list.
<b>Check #</b>	Enter check #, if payment method is <i>Check</i> .
<b>Amount</b>	Enter the amount of the expenditure.
<b>Description</b>	May be required based on Transaction Purpose(s) selected.
<b>Transaction Purpose(s)</b>	Select the appropriate purpose(s).
<b>Transaction Association</b>	If the expenditure is a partial or full payment of a previously entered <b>Account Payable</b> transaction, complete the <b>Transaction Association</b> section. See <i>page 37</i> for more information.

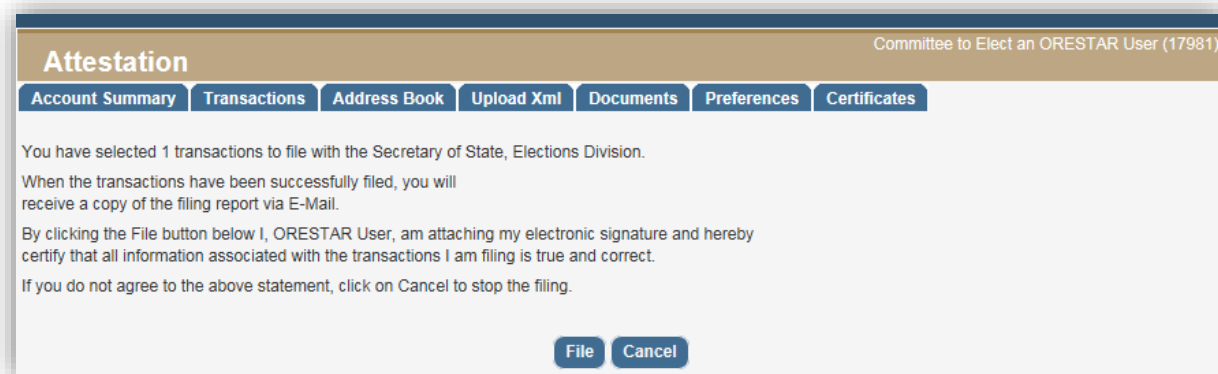
3. Click the **Validate** button.
4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.



**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added and validated, click **Return to Transaction Queue** button.
  - b. To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on its due date.
7. The *Attestation* page opens. Click the **File** button to attest to the transaction filing, or the **Cancel** button. Clicking on either button will return to the *Transaction Queue* page.



8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.

## Personal Expenditure for Reimbursement

An expenditure made by a person from their personal funds (including use of a personal credit card, debit card, checks or cash) made on behalf of the candidate or committee, if the person expects reimbursement. The detail of the expenditure made by the person is required to be reported in addition to the transaction made to reimburse the person.

**i** In ORESTAR, the person who spent the money and expects reimbursement is referred to as the *Payer of the Personal Expenditure*. Enter a separate transaction for each receipt submitted for reimbursement by the payer.

1. From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
2. Enter:

<b>Transaction Date</b>	The date the person purchased the goods or services.
<b>Transaction Type</b>	Expenditure
<b>Sub Type</b>	Personal Expenditure for Reimbursement
<b>Payer of the Personal Expenditure</b>	Type the name of the payer (the person who spent the money) and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Contributor/Payee</b>	Type the name of the payee where the person spent the money and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Amount</b>	Enter the amount of the personal expenditure.
<b>Description</b>	May be required based on <b>Transaction Purpose(s)</b> selected.
<b>Transaction Purpose(s)</b>	Select the appropriate purpose(s).

3. Click the **Validate** button.
4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.

**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added and validated, click **Return to Transaction Queue**.
  - b. To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on the due date.
7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button. Clicking either button will return you to the *Transaction Queue* page.

8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.
9. **Enter a separate cash expenditure transaction to report the reimbursement** from campaign funds. See the next section for steps to report a reimbursement for personal expenditure.

## Reimbursement for a Previously Reported Personal Expenditure

This transaction type discloses the reimbursement made to a person from the committee's funds. One check/payment may reimburse for multiple reported personal expenditures for reimbursement.

ID #	Date	Due Date	Status	Process Status	Contributor/Payee	Tran Subtype	Amount
2199573	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Costco	Personal Expenditure for Reimbursement	\$431.88
2199574	06/01/2016	07/01/2016 11:59 PM	Original	Validated	Jack Smith	Cash Expenditure	\$431.88

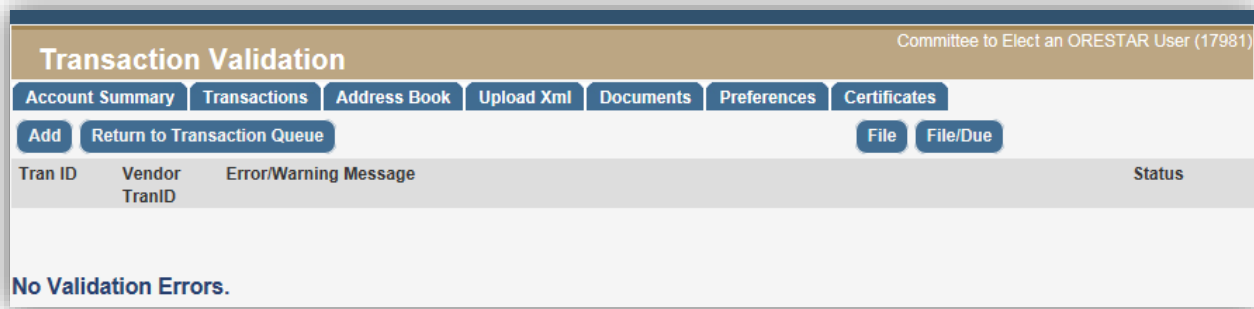
The first transaction is the *Personal Expenditure for Reimbursement* (see page 57 for more information)

- 1) The second transaction is the *Cash Expenditure* (the reimbursement transaction which is shown below)

1. From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
2. Enter:

<b>Transaction Date</b>	The date of the reimbursement.
<b>Transaction Type</b>	Expenditure
<b>Sub Type</b>	Cash Expenditure
<b>Contributor/Payee</b>	Type the name of the person being reimbursed and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Payment Method</b>	The payment method used to pay the person.
<b>Amount</b>	The amount of the reimbursement.
<b>Transaction Purpose(s)</b>	Select <i>Reimbursement for Personal Expenditures</i>

3. Click the **Validate** button.
4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.



**Transaction Validation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

Add Return to Transaction Queue File File/Due

Tran ID	Vendor TranID	Error/Warning Message	Status
No Validation Errors.			

**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added and validated, click **Return to Transaction Queue**.
  - b. To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on its due date.
7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button, which will return you to the *Transaction Queue* page. Clicking on either button will return you to the *Transaction Queue* page.



**Attestation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

You have selected 1 transactions to file with the Secretary of State, Elections Division.  
 When the transactions have been successfully filed, you will receive a copy of the filing report via E-Mail.  
 By clicking the File button below I, ORESTAR User, am attaching my electronic signature and hereby certify that all information associated with the transactions I am filing is true and correct.  
 If you do not agree to the above statement, click on Cancel to stop the filing.

File Cancel

8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.

## Lost or Returned Check

A check that is either returned to the committee, has been reported as an expenditure but is subsequently lost in the mail or never cashed, or an expenditure that is reported and subsequently returned because of insufficient funds.

Committee to Elect an ORESTAR User (17981)

### Transaction Add / Edit

Account Summary
Transactions
Address Book
Upload Xml
Documents
Preferences
Certificates

Validate
Save/Exit
Save/Add
Cancel
Reset

**Transaction Information**

Transaction ID  File Transaction ID

Transaction Date \*  ... Due Date

Transaction Type \*

Sub Type \*

Agent

Payer of Personal Expenditure

Contributor/Payee

Payment Method  Check#

Amount \*

Calendar Year Aggregate \*

Interest Rate  Repayment Schedule

Description

Occupation Letter Date  ...

Notes

123 Main St  
Your City OR  
97000

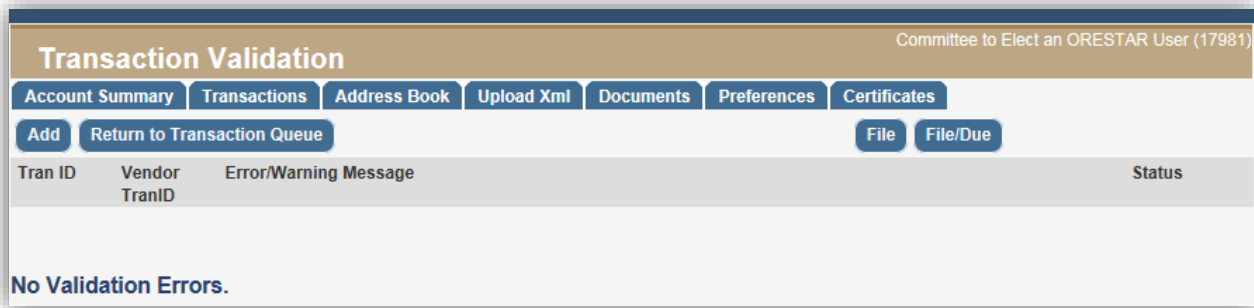
**Transaction Association**

Unassociate:	Associate:	Complete:	Associated Transactions:	Search	Balance
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cash Expenditure for \$52.00 from US Post Office on 06/10/2016 (2199504)	<input type="button" value="Search"/>	\$52.00
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Cash Expenditure for \$27.00 from US Post Office on 06/10/2016 (2199534)		\$27.00

- From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.
- Enter:

<b>Transaction Date</b>	The date the committee orders a stop payment on the check, the date the committee issues a replacement check, or the date the committee no longer expects the check to be cashed.
<b>Transaction Type</b>	Other Receipt
<b>Sub Type</b>	Lost or Returned Check
<b>Contributor/Payee</b>	Type the name of the individual or entity that the check had been made out to and select from the dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Amount</b>	Amount of the lost or returned check.
<b>Transaction Association</b>	Associate to the original <b>Cash Expenditure</b> to reduce the payee's aggregate. See <i>page 37</i> for more information.

3. Click the **Validate** button.
4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.



**Transaction Validation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

Add Return to Transaction Queue File File/Due

Tran ID	Vendor TranID	Error/Warning Message	Status
No Validation Errors.			

**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added and validated, click **Return to Transaction Queue**.
  - b. To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** to file on its due date.
7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button, which will return you to the *Transaction Queue* page.



**Attestation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

You have selected 1 transactions to file with the Secretary of State, Elections Division.  
 When the transactions have been successfully filed, you will receive a copy of the filing report via E-Mail.  
 By clicking the File button below I, ORESTAR User, am attaching my electronic signature and hereby certify that all information associated with the transactions I am filing is true and correct.  
 If you do not agree to the above statement, click on Cancel to stop the filing.

File Cancel

8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.



If the committee issued a replacement check, enter a new cash expenditure transaction to report the expenditure.

# Account Payable

An amount owed to a creditor for goods or services, that have been ordered.

**!** An **Account Payable** is not required to be reported and filed if the expenditure completing the payable is made by the committee prior to the deadline to file the payable. See the [Campaign Finance Manual](#) for more detailed information.

Committee to Elect an ORESTAR User (17981)

## Transaction Add / Edit

Account Summary
Transactions
Address Book
Upload Xml
Documents
Preferences
Certificates

Validate
Save/Exit
Save/Add
Cancel
Reset

**Transaction Information**

Transaction ID

Transaction Date \*  ...

Transaction Type \*

Sub Type \*

Agent

Payer of Personal Expenditure

Contributor/Payee  Add Edit

Payment Method

Amount \*

Calendar Year Aggregate \*

Interest Rate

Description

Occupation Letter Date  ...

Notes

File Transaction ID

Due Date

123 Main St  
Salem OR 97310

Check#

Repayment Schedule

**Transaction Purpose(s)**

+

1. From the *Transaction Queue* page, click the **Add** button. The *Transaction Add/Edit* page opens.

2. Enter:

<b>Transaction Date</b>	The date an order is placed for goods or services and payment is not made at the time of ordering.
<b>Transaction Type</b>	Expenditure
<b>Sub Type</b>	Account Payable
<b>Contributor/Payee</b>	Type the name of the payee and select from dropdown list. If the name does not appear, click the <b>Add</b> button to the right of the field to add an Address Book entry.
<b>Amount</b>	Amount of account payable. The amount may be an estimate.
<b>Description</b>	May be required based on selected transaction purpose
<b>Transaction Purpose(s)</b>	Select the appropriate purpose(s)

3. Click the **Validate** button.

4. The *Transaction Validation* page opens and will report errors or warnings, if any. If necessary, make required corrections and re-validate.

**Transaction Validation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

Add Return to Transaction Queue File File/Due

Tran ID	Vendor TranID	Error/Warning Message	Status
No Validation Errors.			

**Continue to Step 5**, if there are more transactions to add and validate.

**Skip to Step 6**, if entering a single transaction.

5. Click the **Add** button on the *Transaction Validation* page to continue adding transactions.
  - a. After the transactions have been added and validated, click **Return to Transaction Queue**.
  - b. To file one or more transactions from the *Transaction Queue*, check the box to the left of each transaction ID #. To select all transactions in the queue, check the box in the column heading to the left of **ID#**.
6. Click the **File** button to file the transaction immediately, or **File/Due** where the system will file it on its due date.

**Attestation** Committee to Elect an ORESTAR User (17981)

Account Summary Transactions Address Book Upload Xml Documents Preferences Certificates

You have selected 1 transactions to file with the Secretary of State, Elections Division.  
 When the transactions have been successfully filed, you will receive a copy of the filing report via E-Mail.  
 By clicking the File button below I, ORESTAR User, am attaching my electronic signature and hereby certify that all information associated with the transactions I am filing is true and correct.  
 If you do not agree to the above statement, click on Cancel to stop the filing.

File Cancel

7. The *Attestation* page displays. Click the **File** button to attest to the transaction filing, or the **Cancel** button, which will return you to the *Transaction Queue* page. Clicking on either button will return you to the *Transaction Queue* page.
8. After the transaction(s) have been filed, ORESTAR emails a *Transaction Filing Report* to the candidate, treasurer, alternate transaction filer, or independent expenditure filer. The report is also available in the **Documents** tab.

# Filing a Certificate of Limited Contributions and Expenditures

To file a Certificate of Limited Contributions and Expenditures for the current calendar year, proceed with the following:

1. In ORESTAR's campaign finance section, click on the **Certificates** tab.
2. On the *Certificates* page, click on **File Certificate**. The *Certificate Attestation* page displays.

3. Enter the committee's cash balance as of January 1 of the current calendar year.
4. Read the attestation printed on the screen and if agreed, click the **File** button to attest and file the Certificate of Limited Contributions and Expenditures.



If a committee wants to file a Certificate for the calendar year, the committee must not have entered or filed any transactions. ORESTAR will not allow a Certificate to be filed when transactions exist for the current year.

## Exceeding the Certificate Threshold

---

If a committee filed a Certificate for a calendar year and is entering transactions into the committee's account, when the \$3,500 threshold is exceeded the system will expire the Certificate and calculate a due date for all transactions in the committee's *Transaction Queue*. A Due Date appears for each transaction in the *Transaction Queue* and an Expiration Date displays on the Certificates tab.

A committee that has filed a Certificate of Limited Contributions and Expenditures and has entered either contributions or expenditures exceeding the \$3,500 threshold for a Certificate also receives an email informing the committee that the Certificate has expired and the transactions must be filed.

If a committee is not entering transactions into the committee's account, it must separately track the committee's activity to ensure the \$3,500 threshold in contributions or expenditures is not exceeded during the calendar year. If the committee's total contributions or total expenditures during the calendar year exceed \$3,500, the committee must use ORESTAR to enter and file all transactions occurring in the calendar year. The deadline for filing all transactions for that calendar year is seven calendar days after the date of the transaction that exceeds the threshold.



See the [Campaign Finance Manual](#) for more information.

## End of Calendar Year

---

At the end of each calendar year, any transactions that have been entered by a committee that filed a Certificate of Limited Contributions and Expenditures but were not filed because the committee did not exceed the \$3,500 threshold are assigned the "Certificate Filed" process status. Transactions with this process status do not display on the committee's *Transaction Queue* but can be accessed through the *Transaction Search* page.

# Frequently Asked Questions

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## Address Book

### When should I delete an Address Book entry, instead of expiring the entry?

---

You should delete an Address Book entry when the entry has been created in error and has never been associated with a contributor / payee on a transaction. Expiring an entry is appropriate when the entry has been used in the past for reporting transactions, but you have determined that it should not be used in future transaction filings.

 Editing an Address Book entry that is associated with previously filed transactions automatically creates a new Address Book entry and expires the previous Address Book entry so that it cannot be selected for future transactions.

### I discovered that I have duplicate Address Book entries for a contributor. What should I do?

---

This must be corrected so the aggregate for the contributor will calculate correctly. Expire one of your Address Book entries.

- Decide which Address Book entry you want to expire, preferably the one with the fewest related transactions.
- Note any Transaction IDs attached to the Address Book entry you are expiring. Amend these transaction(s) so they are all attached to the entry you decided to retain.
- Expire the duplicate Address Book entry. Choose Edit on the Address Book entry and click in the **Expire Entry** checkbox.

## Transaction Management

### Our committee is using an online site to receive campaign contributions. What transaction date should the committee use when filing these contributions?

---

A contribution received through an online service is considered as having been received by the committee when the contribution is in the physical custody of the committee (e.g., receipt of a check from the service) or is deposited in the committee's campaign account, whichever is sooner.

Report the full amount of the contribution. Any service charge the online site withholds should be reported as a *Cash Expenditure*. Service charges may be aggregated by date, (i.e., the total of all service charges for contributions received on the same date) and reported as a single cash expenditure transaction for the total amount of the service charge.

## How do I report a personal expenditure for reimbursement?

A personal expenditure for reimbursement is defined as:


An expenditure by a person from the person's funds (including use of a personal credit card, debit card, checks or cash) made on behalf of the candidate or committee, if the person expects reimbursement.

### Example

On January 7, 2016, John Smith used his personal credit card to purchase \$431.88 worth of committee office supplies from Costco. He expects reimbursement. John also wants to be reimbursed for mileage.


The committee wrote John check #2001 on January 31, 2016 for \$441.88, which includes mileage.


Based on the example above, you will add three transactions into ORESTAR:

 See *Add a Transaction* on page 29 in this manual for more information on how to add a transaction.

### **1<sup>st</sup> Transaction: *Personal Expenditure For Reimbursement***

<b>Transaction Date</b>	1/7/2016
<b>Transaction Type</b>	Expenditure
<b>Sub type</b>	Personal Expenditure for Reimbursement
<b>Payer of Personal Expenditure</b>	John Smith
<b>Contributor/Payee</b>	Costco
<b>Amount</b>	\$431.88
<b>Description</b>	Office supplies
<b>Transaction Purpose(s)</b>	General Operational Expenses (need Description)

 The *Payer of Personal Expenditure* is the person who spent the money and now expects reimbursement. The *Payee* is where the money was spent (i.e., who received the funds). The *Transaction Date* is the date of the purchase of goods.

 By selecting the sub type *Personal Expenditure for Reimbursement*, the *Account Summary's* outstanding personal expenditure balance will increase by the amount of the transaction after the transaction is filed. The cash expenditure balance does not increase.

**2<sup>nd</sup> Transaction: *Reimbursement of Personal Expenditure***

---

<b>Transaction Date</b>	1/31/2016
<b>Transaction Type</b>	Expenditure
<b>Sub type</b>	Cash Expenditure
<b>Contributor/Payee</b>	John Smith
<b>Payment Method</b>	Check
<b>Check</b>	2001
<b>Amount</b>	\$431.88
<b>Description</b>	[optional]
<b>Transaction Purpose(s)</b>	Reimbursement for Personal Expenditures



Do not associate the reimbursement with the personal expenditure transaction.



By selecting the purpose *Reimbursement for Personal Expenditures*, the Account Summary's outstanding personal expenditure balance will reduce by the amount of the transaction after the transaction has been filed.

**3<sup>rd</sup> Transaction: *Mileage Reimbursement***

---

<b>Transaction Date</b>	1/31/2016
<b>Transaction Type</b>	Expenditure
<b>Sub type</b>	Cash Expenditure
<b>Contributor/Payee</b>	John Smith
<b>Payment Method</b>	Check
<b>Check</b>	2001
<b>Amount</b>	\$10.00
<b>Description</b>	Mileage, 20 miles at a mileage rate of 50 cents per mile.
<b>Transaction Purpose(s)</b>	Travel Expenses (need Description)



***Mileage is not considered a personal expenditure for reimbursement.*** Do not include this amount in the Personal Expenditure for Reimbursement transaction.



Expenditures made for payment to a person for "mileage" are reported as sub type *Cash Expenditure* and purpose code of *Travel Expenses*.

## How do I look up all the transactions for an individual payee?

In the **Transactions** tab, click on the **Search** button.

1. In the *Contributor/Payee* field, enter the payee's Address Book ID or Name.
2. Add other search criteria, if desired.
3. Click **Search**. The search results display on the *Transaction Queue* page.

## How should I associate payments with accounts payable?

Multiple cash expenditures can be associated with a single account payable. For example, monthly cash expenditures may be made against a payable. When entering expenditures that are partial payments, you need to "associate" each expenditure with the same account payable transaction.

Compare the reverse case. A single cash expenditure is made by the committee against a group of accounts payable. In ORESTAR, the cash expenditure may complete several payables, but the cash expenditure can only have a status of 'Associate' with a single account payable. Here is an example.

### Example

The committee has three outstanding payables to ABC Printing, each of which were previously filed in ORESTAR:

	Transaction Date	Amount
Account Payable 1	4/1/2016	\$100.00
Account Payable 2	4/5/2016	\$300.00
Account Payable 3	4/10/2016	\$200.00

On 5/30/2016, the committee writes a \$500.00 check (#10300) to ABC Printing.

The committee must now file a cash expenditure for the \$500 payment and set up the transaction associations. For more information on associating a transaction, see **Transaction Association** on page 37.

### Payment

<b>Transaction Date</b>	5/30/2016
<b>Transaction Type</b>	Expenditure
<b>Sub type</b>	Cash Expenditure
<b>Contributor/Payee</b>	ABC Printing
<b>Payment Method</b>	Check
<b>Check</b>	10300
<b>Amount</b>	\$500.00
<b>Description</b>	<i>[optional]</i>
<b>Transaction Purpose(s)</b>	Literature, Brochures, Printing
<b>Transaction Association</b>	<i>See image and instructions on the next page</i>

Transaction Association example:

**Transaction Add / Edit**
Committee to Elect an ORESTAR User (17981)

Account Summary
Transactions
Address Book
Upload Xml
Documents
Preferences
Certificates

Validate
Save/Exit
Save/Add
Cancel
Reset

**Transaction Information**

Transaction ID:  File Transaction ID:

Transaction Date:  Due Date:

Transaction Type:

Sub Type:

Agent:

Payer of Personal Expenditure:

Contributor/Payee:  Add Edit

101 Main St  
Monmouth OR

Payment Method:  Check#:

Amount:

Calendar Year Aggregate:

Interest Rate:  Repayment Schedule:

Description:

Occupation Letter Date:

Notes:

**Transaction Purpose(s)**

**Transaction Association**

Unassociate:	Associate:	Complete:	Associated Transactions:	Search	Balance
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Account Payable for \$100.00 from ABC Printing on 04/01/2016 (2203089)		\$100.00
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Account Payable for \$300.00 from ABC Printing on 04/05/2016 (2203093)		\$300.00
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Account Payable for \$200.00 from ABC Printing on 04/10/2016 (2203092)		\$200.00

The \$500 expenditure payment completes both *Account Payable 1* and *Account Payable 2*; *Account Payable 3* is not paid in full so it will be “associated”. Follow steps below:



- a. After entering the transaction information, click on the Transaction Association bar.
- b. Select **Complete** for both *Account Payable 1* and *Account Payable 2*.
- c. Select **Associate** for *Account Payable 3*.

**i** Another \$100 payment would “Complete” **Account Payable 3**. A payment of less than that would “Associate” with **Account Payable 3**.

## We will be paying a campaign staffer with a single check for wages and reimbursement for a personal expenditure associated with travel. Can we file a single transaction for the expenditure?

---

No. You will need to file two *Cash Expenditure* transactions: one for the wages, and second for the reimbursement for personal expenditures. The expenditure that reports a reimbursement must have **only one** purpose: *Reimbursement for Personal Expenditures*.

-  A single check (or other payment type) can be written to the staffer, but two transactions must be filed.
-  The personal expenditure made by the staffer is also a reportable ORESTAR transaction, sub type *Personal Expenditure for Reimbursement*.

## How should my committee report a transaction where a third party makes a direct payment of a committee's loan?

---

File an *In-Kind* contribution from the third party and associate it with the relevant Loan Received transaction. This will reduce the outstanding loan amount on the committee's ORESTAR Account Summary.

## My candidate committee has opted out of using the system aggregate calculation function for the current calendar year. Do we need to enter all transactions in ORESTAR?

---

Yes, all transactions still need to be filed in ORESTAR. Here is a review of system aggregation feature:

- ✓ An "opt out" committee is a committee that has chosen to manually track and calculate contributor/payee aggregates, instead of using ORESTAR's aggregate function. The "opt out" committee must only itemize a transaction when the contributor's or payee's calendar year aggregate has exceeded \$100.
- ✓ A contributor/payee transaction that has not exceeded the contributor/payee \$100 calendar year aggregate must also be entered into ORESTAR, subject to transaction filing deadlines, but these are entered under **Contributor/Payee categories**, found in the ORESTAR Address Book. Do not enter contributor/payee names for these 'miscellaneous \$100 and under' transactions. The sum total for a single day is instead entered using the appropriate 'miscellaneous \$100 and under' sub type category.
- ✓ The "opt out" committee is required to enter a calendar year aggregate amount for each contributor or payee **that has exceeded the \$100 calendar year threshold**. All contribution and expenditure sub types must be aggregated together to calculate the **Calendar Year Aggregate**.

See [page 33](#) for the list of 'miscellaneous \$100 and under' categories available in the *Contributor/Payee* field.

An example of entering 'miscellaneous \$100 and under' transactions for a committee that has "opted out" is shown on the next page:

**Example**

On January 21, 2016 Mary Jones makes a cash contribution of \$50.00 and an in-kind contribution valued at \$20.00. Her friend, Sue Smith, makes a \$45.00 cash contribution on the same date.

Sue makes an in-kind contribution at a June 28, 2016 event for \$75.00.

Note that a **Calendar Year Aggregate** (of contributions for the contributor) must be entered for each contribution transaction, other than ‘miscellaneous \$100 and under’ entries. The **Calendar Year Aggregate** field is not entered for the miscellaneous categories.

Trans Date	Transaction Type Sub Type	Contributor/Payee	Amount	Calendar Year Aggregate	Note that...
1/21/2016	Contribution Cash Contribution	Miscellaneous Cash Contributions \$100 and under	\$95.00		Mary Jones and Sue Smith are <b>under</b> the \$100 contribution threshold. Mary has only contributed \$70 and Sue, \$45.
1/21/2016	Contribution In-Kind Contribution	Miscellaneous In-Kind Contributions \$100 and under	\$20.00		Mary Jones is <b>under</b> her \$100 contribution threshold (\$70).
6/28/2016	Contribution In-Kind Contribution	Sue Smith	\$75.00	\$120.00	Sue Smith is now <b>over</b> her \$100 contribution threshold (\$120 -- cash contribution of \$45, in-kind contribution of \$75).

**Only Sue Smith’s 6/28/2016 \$75.00 in-kind contribution will be disclosed to the public.**

In a public search of the committee’s campaign finances, Sue’s 1/21/2016 \$45.00 cash contribution will be rolled up with all ‘Miscellaneous Cash Contributions \$100 and under’ for that day, as will Mary’s \$50.00, also received on 1/21/2016. Mary’s \$20.00 in-kind contribution will be included in the ‘Miscellaneous In-Kind Contributions \$100 and under’ for that day.


If, at the time of the transaction, the calendar year aggregate for a contributor or payee is \$100 and under, the transaction must be rolled up in the appropriate 'miscellaneous' category. Contributor/payee information is not disclosed.

## My committee loaned a PAC \$10,000. How do I report the loan and loan payments received?

An expenditure made by a committee that is a loan to another individual, committee or organization is filed as a *Cash Expenditure*, with a Transaction Purpose of 'Loan Extended.' The terms of the loan (i.e., the interest rate and repayment schedule) must be disclosed. Enter '0' (zero) if there is no interest rate; if there is no repayment schedule, indicate 'payable when funds available'.

The system does not generate an outstanding other receivable when a committee makes a loan to someone else. In order for this receivable to appear in the Account Summary, you must **manually set up a Miscellaneous Account Receivable** for each Loan Extended expenditure filed by the committee. The transaction date of the receivable is the date the loan was made. Do not associate the Miscellaneous Account Receivable with the Loan Extended.

Payments received on Loans Extended are filed as Other Receipts, sub type *Miscellaneous Other Receipt*. These transactions must be associated with the loan's Miscellaneous Account Receivable transaction.

 The PAC committee receiving this loan will need to report this loan as a contribution, sub type Loan Received (Non-Exempt) and include the interest rate and repayment schedule.


## How should my committee report travel expenses in ORESTAR?

If the travel expenses were paid directly out of the committee's account, file a *Cash Expenditure* with a purpose of *Travel Expenses*. Include information in the Description field (e.g., lodging, airfare, meals).

If, however, the travel expense was paid from the traveler's personal funds, the reporting requirements are based on whether reimbursement is expected.

**If reimbursement from committee funds is expected**, file a *Personal Expenditure for Reimbursement* sub type transaction with a purpose of *Travel Expenses* (additional information in the Description field). When the traveler is reimbursed, file a *Cash Expenditure* with purpose of Reimbursement for Personal Expenditures.

**If reimbursement from committee funds is not expected**, file an In-Kind Contribution transaction.

 **Exception** If the traveler is an individual working on a committee's campaign (including a candidate) travelling on behalf of the committee, **or** a candidate whose travel is related to the candidate's official duties as an office holder, and no reimbursement is expected, it is not considered an in-kind contribution and it is not necessary to file a contribution transaction.

## Fundraising Activities

### A state senator's candidate committee is holding a fundraiser that also benefits a house candidate in her district. How should the expenses associated with the fundraiser be reported?

---

The **Senatorial candidate committee** reports its fundraising expenses as follows:

1. From the **Transactions** page, click on the **Add** button. The *Transaction Add/Edit* page opens.
2. Select *Expenditure* transaction type, sub type *Cash Expenditure*, with Transaction Purpose as *Fundraising Event Expenses*.
3. In the **In-Kind or Independent Expenditure Information** section, enter the following:
  - a. **Indicator:** In-Kind
  - b. **Committee Name:** Type the name of the *House candidate's committee*
  - c. **Amount:** *Apportion expenses of the fundraiser, based on the elector size of the house district relative to that of the senate district.*

The **House candidate committee** reports an in-kind contribution in the same amount.

1. From the **Transactions** page, click on the **Add** button. The *Transaction Add/Edit* page opens.
2. Select *Contribution* transaction type, sub type *In-Kind Contribution*, with Transaction Purpose as *Fundraising Event Expenses*.
3. In the *Candidate/Payee* name field, type the name of the Senate committee and select from the dropdown list. If the name does not appear, click the **Add** button to the right of the field to add an Address Book entry.
4. Enter the amount of the in-kind contribution

### Can the candidate give away t-shirts for free?

---

No. A t-shirt giveaway would be an instance where a candidate is giving something of value to a voter. This qualifies as "undue influence" and may violate election law (ORS 260.665).

However, the t-shirts may be sold for at least fair market value. The fair market value of the t-shirt would be reported as a transaction type *Other Receipt*. Any amount over and above the shirt's fair market value must be reported as a contribution.

## The committee held a fundraising dinner with an established cost per person. How do we report the money we received to attend the dinner?

If a contributor attends a fundraising event and receives goods or services, such as a dinner or t-shirt, only the amount paid in excess of the fair market value of the goods or services received is considered a contribution. Fair market value is the dollar amount one would expect to pay for the goods or services.

A fundraising dinner example follows:

### Example

On March 28, 2016, a fundraising dinner was held. The ticket cost was \$50.00 and the value of the dinner was \$20.00. Tickets were sold at the door on the day of the dinner. There were 255 contributors in attendance.

The evening of the dinner, the committee paid the caterer \$3,600.00.

Assuming all attendees purchased tickets, the committee received 255 cash contributions of \$30.00 each. Therefore, there are 255 cash contribution transactions that must be entered. The transaction date would be the date the contributor purchased a ticket, in this case, 3/28/2016.

In addition to the cash contributions, a portion of the ticket proceeds received by the committee represents the fair market value of the dinner and should be reported as an ‘Other Receipt’. Funds received on a single day that qualify as “items sold at fair market value” may be totaled and reported as one transaction.

### ***Cash Contributions: file 255 transactions***

<b>Transaction Date</b>	3/28/2016
<b>Transaction Type</b>	Contribution
<b>Sub Type</b>	Cash Contribution
<b>Contributor/Payee</b>	Name of ticket purchaser (requires name, address, occupational information for each ticket buyer, if the contributor’s calendar year aggregate has exceeded \$100)
<b>Amount</b>	\$30.00

### ***Items Sold at Fair Market Value: file 1 transaction***

<b>Transaction Date</b>	3/28/2016
<b>Transaction Type</b>	Other Receipt
<b>Sub Type</b>	Items Sold at Fair Market Value
<b>Contributor/Payee</b>	(This is not a required field when reporting Items Sold at Fair Market Value)
<b>Amount</b>	\$5,100.00

**Cash Expenditure: file 1 transaction**

<b>Transaction Date</b>	3/28/2016
<b>Transaction Type</b>	Expenditure
<b>Sub Type</b>	Cash Expenditure
<b>Contributor/Payee</b>	<i>Caterer's name</i>
<b>Amount</b>	\$3,600.00
<b>Transaction Purpose(s)</b>	Fundraising Event Expenses

## Is the amount paid for an item purchased at a fundraising auction considered a contribution?

Yes, in part. Money received up to the fair market value of the item is reported as transaction type *Other Receipt* and sub type *Items Sold at Fair Market Value*. Any amount paid for an item that exceeds the fair market value of the item is reported as a cash contribution.

**If an auction item sells for less than its fair market value**, report as an *Other Receipt* of the amount for which it sold. You are not required to record the buyer's name or related data on *Items Sold at Fair Market Value*.

### Example

A candidate committee fundraising auction was planned. Will White donated a weekend at a resort to the auction, valued at \$550.00. The winning bidder paid \$800.00 for the resort weekend.

Three transactions must be reported:

- \$550.00 In-Kind Contribution
- \$550.00 Items Sold at Fair Market Value
- \$250.00 Cash Contribution



If a good or service is donated as an auction item, report as an in-kind contribution in the amount of the fair market value of the good or service.

## The candidate is attending a fundraising dinner for the Chamber of Commerce as part of her office holder duties. How does she report this?

Report this as a Cash Expenditure, with a transaction purpose of *Public Office Holder Expenses*. Additional information is also required in the *Description* field. If the cost of the attendance exceeds the fair market value of the dinner, add an additional purpose of Cash Contribution.

## Certificate of Limited Contributions and Expenditures

### **My candidate committee expects to spend more than \$750, but does not expect its contributions or expenditures to exceed \$3,500 during the calendar year. What filings are required?**

---

If a candidate expects to receive or spend more than \$750 during the year, the candidate must establish a campaign account and file a Statement of Organization for Candidate Committee. File the Statement of Organization for Candidate Committee within **3 business days** of first receiving a contribution or making an expenditure.

Since you do not expect contributions or expenditures to exceed \$3,500, you may also file a PC 7, Certificate of Limited Contributions and Expenditures. You must file a PC 7 no later than 7 calendar days after receiving the first contribution or making the first expenditure in a calendar year. A PC 7 cannot be filed if you have entered any transactions in ORESTAR for the year.

If you successfully file a PC 7 and your committee does not exceed the \$3,500 threshold for the calendar year, your committee is not required to report its transactions electronically. However, you are encouraged to enter the committee's transactions into ORESTAR's Private Workshop so the system can assist in determining whether your committee exceeds the \$3,500 threshold. If the threshold is exceeded, all transactions occurring in that calendar year must be filed not later than seven days after the threshold is exceeded.

## Civil Penalties

### **Can an individual pay the civil penalties incurred by a committee?**

---

Yes. Penalties (for all violations other than prohibited use of committee funds) may be paid from any source. Report an expenditure transaction if it is paid from committee funds. A penalty that is not paid from committee funds is not required to be reported. This payment is not considered an in-kind contribution from the person who paid the penalty because individuals are liable for a violation, not the committee.

## Revision Table

Date of Change	Changes Made	Pages Affected
1/19/2017	Under Transaction Association heading, changed the example icon page reference from <a href="#">37</a> to <a href="#">71</a>	37
1/19/2017	Under Completing the Transaction Association heading, changed the page reference from <a href="#">37</a> to <a href="#">71</a>	38
1/19/2017	Under How do I report a personal expenditure for reimbursement heading, changed the page reference from <a href="#">21</a> to <a href="#">29</a>	69

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## ABOUT THIS

The McMinnville Planning Department Informational Brochure series has been developed to provide general information on land use regulations commonly affecting activities undertaken by the public and administered by this office. The information contained in these brochures is not intended to be a complete statement of all applicable regulations

Patrons are encouraged to contact the Planning Department for a complete list of rules, procedure, and applicable permitting requirements.

## NEED MORE INFO?

Information is available online on zoning, parking requirements, landscaping, public meetings, land-use applications, meetings and committees.

For information about all City Departments contact us by any of the methods below.



(503) 434-7311



[www.mcminnvilleoregon.gov](http://www.mcminnvilleoregon.gov)



231 NE 5th St.  
McMinnville, OR 97128



**City of  
McMinnville**



**City of  
McMinnville**



## SIGN REGULATION BASICS

McMinnville allows for an increased number of temporary signs around standard election times. During the six weeks prior and 14 days after an official election date an unlimited amount of temporary signs no larger than six square feet may be placed on your property.

Signs must meet the following criteria:

- They do not block clear vision of intersections, parking lots, or driveways.
- They are not located in a public right-of-way.
- They are not attached to trees, shrubs, or utility poles.
- If over 3 feet tall, they are located at least 5 feet back from the property line.
- They do not flash, blink, use mechanized movement, or electronic messaging.
- They are placed only with the consent of the property owner.

## SIGNS DURING ELECTIONS

Signs are prohibited on City-owned property, such as parks and roundabouts and will be immediately removed.

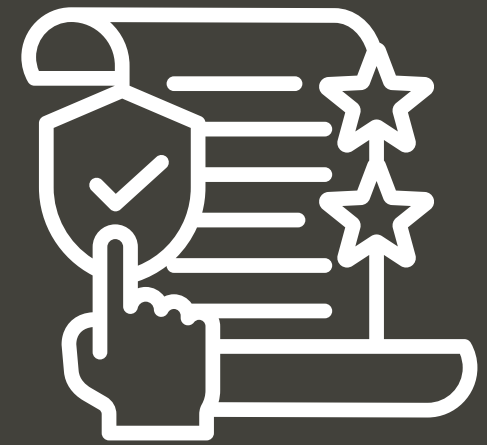
The strip of ground between the sidewalk and street is considered the right-of-way and therefore publicly owned. Temporary signs are not permitted to be located there.

You may not place temporary signs on fire hydrants, trees, shrubs, utility poles, or traffic control posts.

Signs attached to a building may not be also attached to a roof.

Signs are permitted on cars that are used for transport and normal day-to-day operations only. They may not be displayed on cars parked in the public right-of-way with intent of displaying the sign..

Handheld signs, if not creating a hazard or blocking a right-of-way, are permitted.



## AND THIS

If I see temporary signs in McMinnville bigger than six square feet. Are they allowed?

Larger temporary signs are permitted year-round on commercial and industrial zoned property. These properties are permitted one sign, up to 16 square feet in area, for each 250 feet of property that abuts a public street. These larger signs must meet the placement criteria noted earlier. In addition, these properties have no limit on the size or number of signs that may be placed flat on building walls; they must all be situated below the roof-line, as well.

A full description of temporary sign regulations can be found in Chapter 17.62 of the McMinnville Zoning Ordinances.

For more information visit:  
<https://www.mcminnvilleoregon.gov>  
or scan the QR code





## Yamhill County Clerk

### Registered Voters by District in Yamhill County - January 2, 2026

County Voter Pamphlet Candidate and Measure Argument Fees by District/City for 2026

CANDIDATE FEE		ARGUMENT FEE	DISTRICT	TOTAL VOTER REGISTRATION
(unpaid position)	(paid position)			
\$ 50	\$ 50	\$ 200	Amity City	1,201
25	100	200	Amity Fire	2,933
25	100	200	Amity School	3,211
50	50	200	Carlton City	1,904
25	100	200	New Carlton Fire	2,749
25	100	400	Chehalem Park & Recreation District	26,524
25	100	400	Chemeketa Community College	51,263
50	50	200	Dayton City	1,953
25	100	200	Dayton Fire	3,658
25	100	200	Dayton School	4,002
50	50	200	Dundee City	2,433
25	100	200	Dundee Fire	1,196
25	25	100	Gaston City	0
25	100	100	Gaston Fire	753
25	100	100	Gaston School	511
25	100	100	Hillsboro School	13
50	50	200	Lafayette City	3,352
100	100	350	McMinnville City	23,708
25	100	400	McMinnville Fire District	27,160
25	100	400	McMinnville School	30,351
25	100	100	Nestucca Valley School	0
100	100	350	Newberg City	17,339
25	100	400	Newberg School	26,612
25	100	100	NW Regional ESD	605
25	100	400	Portland Community College	26,614
50	50	200	Sheridan City	3,376
25	100	200	Sheridan Fire	4,667
25	100	200	Sheridan School	4,269
25	100	100	Sherwood School	26
25	100	350	Tualatin Valley Fire & Rescue	23,068
25	100	400	Willamette ESD	77,272
50	50	200	Willamina City	1,044
25	100	200	West Valley Fire	2,197
25	100	200	Willamina School	2,624
50	50	200	Yamhill City	1,061
300	300	400	Yamhill County	77,877
25	100	200	Yamhill Fire	3,385
25	100	250	Yamhill-Carlton School	6,258
25	100	400	Yamhill County Soil & Water	77,877

### ORS 251.325 – OAR 165-022-0050 - Filing Fees for (Voter Pamphlet) Statements and Arguments

- (1) Filing fees for statements and arguments shall be filed with the County Clerk at the time of submittal.
- (2) A verified signature petition may be substituted for the appropriate filing fee for measure arguments (ORS 251.355). The petition shall be submitted on forms prescribed by the County Clerk.
- (3) The filing fees for candidate statements and measure arguments shall be based upon the electoral jurisdiction's registration as of January 1st of the election year.
- (4) The filing fees shall be: see above table.
- (5) Refunds of filing fees shall conform to ORS 251.325(5) and the procedures established by the County Clerk.

### **ORS 251.325 Schedule and procedures for producing and distributing pamphlet; fees; rules.**

- (1) The Secretary of State by rule shall adopt a schedule and procedures for preparing, printing and distributing county voters' pamphlets. The schedule and procedures shall include but not be limited to deadlines for filing material for the voters' pamphlet, and except as otherwise provided by law, the format of material to be submitted and the size and other requirements applicable to candidate portraits.
- (2) Except as provided in subsection (3) of this section, at the time materials are filed under ORS 251.335, each candidate for nomination or election to the following offices shall pay to the County Clerk the following fee for space in the county voters' pamphlet:
  - An office to which a salary or other compensation beyond expenses is attached **\$100.00**
  - An office to which a salary or other compensation beyond expenses is not attached **\$25.00**
- (3) At the time materials are filed under ORS 251.335, each candidate for nomination or election to a city or county office at the primary or general election shall pay to the County Clerk the following fee for space in the county voters' pamphlet:
  - Districts with fewer than 1,000 active voters within the county **\$25.00**
  - Districts with 1,000 - 9,999 active voters within the county **\$50.00**
  - Districts with 10,000 - 49,999 active voters within the county **\$100.00**
  - Districts with 50,000 or more active voters within the county **\$300.00**
- (4) The Secretary of State by rule shall adopt a schedule of fees to be charged by the County Clerks for including arguments in the voters' pamphlet. The fees need not reflect the actual cost of producing the voters' pamphlet.
- (5) The County Clerk shall refund a filing fee described in this section to any person who applies for the refund not later than the last day for filing material for inclusion in the voters' pamphlet. When a refund is made, the material for which the fee was paid may not be included in the pamphlet.
- (6) As used in this section, "electoral district" means a county, the part of a city located within the county or, if a candidate is elected by zone or subdistrict of the county or city, the zone or subdistrict in which the candidate is nominated or elected. [1989 c.1031 §4; 2003 c.468 §1]

### **OAR 165-022-0050 Filing Measure Arguments**

- (1) Any person may file an argument supporting or opposing a measure with each County Clerk of the counties in which the local government that filed the measure is located if the counties will be publishing a voters' pamphlet.
- (2) The County Clerk may require that an argument supporting or opposing a measure be typewritten or legibly printed and submitted on a form approved by the County Clerk.
- (3) The content of arguments shall conform to ORS 251.395:
- (4) The names of persons or organizations to be excluded from arguments shall conform to ORS 251.405;
- (5) Arguments shall be limited to 325 words.
- (6) All materials submitted for inclusion in a county voters' pamphlet shall not exceed 30 square inches of space.
- (7) Filing fees or signature petitions for arguments shall be filed with the County Clerk at the time of submitting the arguments.
- (8) A verified signature petition may be substituted for the appropriate filing fee for measure arguments (ORS 251.355). The petition shall be submitted on forms prescribed by the County Clerk.
- (9) The filing fees for measure arguments shall be based upon the electoral jurisdiction's registration as of January 1st of the election year.
- (10) The filing fees shall be:
  - (a) For a jurisdiction with voter registration of less than 1,000 within a county **\$100.00**
  - (b) For a jurisdiction with voter registration between 1,000 and 4,999 within a county **\$200.00**
  - (c) For a jurisdiction with voter registration between 5,000 and 9,999 within a county **\$250.00**
  - (d) For a jurisdiction with voter registration between 10,000 and 24,999 within a county **\$350.00**
  - (e) For a jurisdiction with voter registration over 25,000 within a county **\$400.00**

# Joint County Voters' Pamphlet Candidate Statement Instructions

## Where to File a Candidate Statement

To publish a Candidate Statement in the Clackamas, Multnomah, Washington, or Yamhill County Voters' Pamphlet, submit a Joint County Voters' Pamphlet Candidate Statement (JCVP-01) filing and fee to the county's elections office by 5 pm on the deadline day.

**If the office's jurisdiction or district is located in more than one county:** Each County produces its own Voters' Pamphlet. Submit a separate JCVP-01 filing and fee to the county elections office in **each** county where the statement is to be printed.

## Filing Fees & Payment Options

- Special District & Metro candidates; City or County candidates at a special election:
  - **\$25** - If the office has **no salary or compensation** beyond expenses
  - **\$100** - If the office **has a salary or compensation** beyond expenses
- City & County candidates at a Primary or General Election:
  - **\$25** - For offices with **fewer than 1,000 eligible voters** within the county
  - **\$50** - For offices with **1,000 - 9,999 eligible voters** within the county
  - **\$100** - For offices with **10,000 - 49,999 eligible voters** within the county
  - **\$300** - For offices with **50,000 or more eligible voters** within the county

Contact the county's elections office or visit its website to determine a specific office's Candidate Statement filing fee.

**Payment Options:** Credit/debit card, cash, and check are accepted.

## How to File a Candidate Statement

JCVP forms can be filed in person, by mail, or electronically.

- A complete filing includes: a signed JCVP-01 form (required), the typewritten statement (required), portrait photo (optional), JCVP-02 Endorsement forms (when applicable), and the filing fee (required).
- The complete filing, including fee payment, must be received by the county elections office by 5 pm on the filing deadline day. Postmarks on mailed filings do not count.
  - Filings without a signature or received after 5 pm on the filing deadline will be rejected.
- No changes can be made to the Candidate Statement, portrait, or Endorsements after 5 pm on the filing deadline.

### Electronic Filers:

- **Clackamas/Washington/Yamhill:** Submit all materials as email attachments. Cloud-hosted documents (e.g., Google Drive, Dropbox links) are not accepted.
- **Multnomah:** File online at <http://multco.us/vp-file>

**In-person Filers: Please provide electronic copies** of 1) **statement text** to offer elections staff maximum time to review and identify any word count issues, and 2) **portrait photo** for better print quality.

- **Clackamas/Washington/Yamhill:** Email portrait and statement text (.doc or .txt format, or copy text into email body).
- **Multnomah:** Upload portrait and statement text (.doc or .txt format) using the link emailed to you after filing.
- If print and electronic copies differ, the original print version will be published unless an amendment is filed.

**Note:** Filing early offers Elections staff more time to notify you about issues with the word count, Endorsement forms, or portrait photo. Issues can be corrected until the 5 pm filing deadline.

## Signature Requirements

The JCVP-01 form must be signed by the candidate or their authorized agent.

- **Electronic signatures are accepted if they represent a true/"wet" signature.**
- Digital signatures (digital certificates, typed fonts, etc.) are not accepted on printed, emailed, or uploaded forms.

## Content & Formatting Requirements

- The statement's combined Required and Optional Information text **must not exceed 325 words/numbers**. It must be typewritten and only include words/numbers.
  - If the statement is over the limit, words exceeding the limit will be cut from the end.
- All statements must include information under these required headings: "Occupation", "Occupational Background", "Educational Background", and "Prior Governmental Experience." The rest of the statement is "Optional Information".
  - If you have no relevant experience, type the word "none" after the required heading.
  - Required headings must be part of the statement, but do not count toward the word limit. Any words typed after the heading (including "none") do count.
- Generally, anything with white space around it counts as a word.

- Bullet points and numbers in a numbered list do not count as words.
- Hyphenated words count as more than one word unless there is a dictionary-accepted spelling as a single word (e.g. re-elected and reelected).
- Ampersand (&) counts as one word.
- Website URL counts as one word.
- **Hand-count the statement to ensure it meets the 325-word limit;** word processors' word counts vary.
- Proof the statement before filing. Elections staff will not correct errors in spelling, punctuation, grammar or syntax. No corrections are allowed after the filing deadline.
- If material in the statement violates ORS 251.415, the violating material will be removed from publication. You will be notified about the removal when possible.

**Required Information Formatting**

Required Information should be submitted and will be published in a standard format:

- Each required section is a run-on list, with items separated by commas, colons, or semicolons.
- Information is in plain text (no boldface, all caps, centering, underlining, bulleted list, etc.).

**If you submit required information in a different format, it will be standardized for publication.**

**Optional Information Formatting**

- "Optional Information" may use basic formatting (boldface, all caps, centering, underlining, bulleted/numbered lists).
- Italics may only be used when citing the source of a published quote; other uses will be changed to plain text.
- Custom formatting may be adjusted to fit text to available print space.

**Endorsements**

If a person or organization is named as an endorser or supporter in the statement, you must file a JCVP-02 Endorsement form signed by the endorser by 5 pm on the filing deadline or the name will be removed.

- Endorsement text should be included as part of the typewritten statement and does count toward the 325-word limit.
- See the JCVP-02 forms for detailed instructions.

**Publicly Published Quotes**

Material published publicly before the filing deadline may be quoted without an Endorsement form if the source and publication date are cited. The quote, source, and date count towards the 325-word limit. Use italics when citing the source and date. **Example:** "The candidate would do great things in this position." -*Joe Smith, The Oregonian, 4/15/25.*

**Portrait Photo Requirements (ORS 251.075)**

An optional portrait photo must meet these criteria:

- Headshot (shoulders to top of head) with a **plain background**.
- Recent (no more than 4 years old).
- Does not include hands, hat, sunglasses, or apparel/objects associated with any organization or affiliation.
- Electronic submissions must be a .jpg, .png, or .tif format.

Portraits will be reduced to 1.5" x 1.75" and printed on newsprint. The portrait must be filed with a JCVP-01 form and received by 5 pm on the filing deadline. The portrait will only be published if it meets requirements.

**Changes & Amendments**

Changes to the Candidate Statement, endorsements, or portrait photo may be made until 5 pm on the filing deadline. Submit an updated filing with a new, signed JCVP-01 form that has the "amended" box marked. No additional fee is required. **No changes are permitted after the 5 pm filing deadline.**

**Contact Information**

<p><b>Clackamas County Elections</b>          1710 Red Soils Ct., Suite 100, Oregon City, OR 97045  <b>Phone:</b> 503-655-8510  <b>Email:</b> elections@clackamas.us</p>	<p><b>Washington County Elections</b>          2925 NE Aloclek Dr., Suite 170, Hillsboro, OR 97124  <b>Phone:</b> 503-846-5800  <b>Email:</b> elections@washingtoncountyor.gov</p>
<p><b>Multnomah County Elections</b>          1040 SE Morrison St., Portland, OR 97214  <b>Phone:</b> 503-988-8683  <b>Email:</b> filings@multco.us</p>	<p><b>Yamhill County Elections</b>          414 NE Evans St., McMinnville, OR 97128  <b>Phone:</b> 503-434-7518  <b>Email:</b> elections@yamhillcounty.gov</p>

# Joint County Voters' Pamphlet Candidate Statement



**Important! Read all instructions before completing this form.**

Please note that each county produces a separate County Voters' Pamphlet. If the jurisdiction or district is located in more than one county, a separate JCVP-01 form must be filed and the filing fee paid to each county where the Candidate Statement is to be printed.

## 1. Filing Information

**Election Date:** \_\_\_\_\_

**Amended Statement**

**Name of Candidate** (As it should appear on the ballot): \_\_\_\_\_

**Filing for the Office of:** \_\_\_\_\_

**District/Position:** \_\_\_\_\_

**"This information furnished by"** (Required: Name of Candidate or Committee as it should appear in the Voters' Pamphlet): \_\_\_\_\_

## 2. Contact Information

**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Warning:** Any person who supplies information in the Required Information portion of a Voters' Pamphlet statement, knowing it to be false, is subject upon conviction of a Class C felony; to imprisonment for up to five years or to a fine of \$125,000; or both.

ORS 260.715 (1); 260.993; 161.605; and 161.625.

*Note: Language which violates any provision of ORS 251.415 will be excluded from the Voters' Pamphlet.*

By signing this document, I hereby state:

- That all information provided by me on this form and in this 'Candidate Statement' is true to the best of my knowledge;
- That I am the author of this 'Candidate Statement' (ORS 251.415);
- That I have read and understand the instructions for submitting this 'Candidate Statement'; and
- That the portrait, if provided, is less than four (4) years old.

\_\_\_\_\_  
**Signature of Candidate or Agent on behalf of Candidate**

\_\_\_\_\_  
**Date Signed**

\_\_\_\_\_  
**(If applicable) Printed name of Agent**

\_\_\_\_\_  
**Phone Number**

### For Office Use Only

County: _____	Required Info? Yes No	Word Count (325 max):
Payment Method: _____	Optional Info? Yes No	Providing digital copy? Yes No
Ref. Number: _____	Endorsements? Yes # _____ No	Received digital copy? Yes No
Amount: \$ _____	Portrait? Print? # _____	Review Staff Initials:
Intake Staff Initials: _____	Providing digital copy? Yes No	
	Received digital copy? Yes No	
	None	

## Candidate Statement for Voters' Pamphlet

### 3. Candidate Checklist

Typewritten & Signed JCVP-01

Required Information:

Occupation

Occupational Background

Educational Background

Prior Governmental Experience

Word Count (325 words/numbers MAX)

Fee Provided

(If applicable) JCVP-02 Endorsement Forms #: \_\_\_\_\_

(Optional) Optional Information

(Optional) Portrait Photo

### 4. Required Information

#### Candidate Name:

Maximum of 325 hand counted typewritten words/numbers for the combined Required and Optional Information sections, excluding the bold headings already printed on this form. All sections of the Required Information must be completed. If there is not relevant information for a required section, the word "None" should be inserted.

**Occupation** (present paid or unpaid employment):

**Include in Attached Statement**

**Occupational Background** (any previous paid or unpaid employment):

**Include in Attached Statement**

**Educational Background** (relevant school(s) attended):

Name of School	Educational Study – Major/Minor	Diploma/Degree/Certificate
<b>Include in Attached Statement,</b>	<b>Include in Attached Statement,</b>	<b>Include in Attached Statement,</b>
,	,	,
,	,	,
,	,	,

**Prior Governmental Experience** (elected or appointed):

**Include in Attached Statement**

### 5. Optional Information

Attach a separate sheet with your Optional Information. **Remember: both your Required and Optional Information count toward the 325-word limit (excluding required information headings).**

**Joint County Voters' Pamphlet Statement of Endorsement Instructions**

**When must a Joint County Voters' Pamphlet Endorsement Form (JCVP-02) be filed?**

If a person or organization is named as an endorser or supporter in your Candidate Statement (JCVP-01) or Measure Argument (JCVP-03), you must file a JCVP-02A or JCVP-02B Endorsement form signed by the endorser.

You **do not** need a JCVP-02 form for:

- The publication of the candidate's or argument furnisher's own name.
- A publicly published quote that is cited with the source and date.
- A name used for reasons other than support, like referencing a historical figure.

**How to File Statement(s) of Endorsement**

- Submit JCVP-02 form(s) along with the Candidate Statement (JCVP-01) or Measure Argument (JCVP-03) filing.
  - The original or a copy of the JCVP-02 form can be filed in person, by mail, or electronically.
  - For quicker review, organize endorsement forms in the order they are listed in the statement/argument text.
- The county elections office must receive JCVP-02 forms by 5 pm on the filing deadline.
  - JCVP-02 forms cannot be changed or corrected after the deadline.
  - Mailed forms are not counted by their postmark.
- Names and any endorsement text must be included in the statement or argument text, and will count toward the 325-word limit.

**Note:** Filing early offers Elections staff more time to notify you about issues with your Endorsement forms. Issues can be corrected until the 5 pm filing deadline.

**Signature Requirements**

The JCVP-02 form must be signed by the endorsing person or by the endorsing organization's authorized representative. This gives the candidate or argument furnisher permission to publish their name.

- Electronic signatures are accepted if they represent a true/"wet" signature.
- Digital Signatures (digital certificates, typed fonts, etc.) **are not accepted** on JCVP-02 forms.

Unsigned or otherwise incomplete JCVP-02 forms will be rejected. The endorsement will be removed from the statement or argument unless the county elections office receives an acceptable JCVP-02 form by 5 pm on the filing deadline.

**Endorsement Form Options**

**JCVP-02A Form – Filer Determines How to Use Endorser's Name and Information**

- The JCVP-02A form lets the candidate/argument furnisher decide how the endorser's name, title, and other biographical information about them will appear in the Candidate Statement or Measure Argument.

**JCVP-02B Form – Endorser Determines How Their Name and Information Are Used**

- The JCVP-02B form requires the candidate/argument furnisher to publish the endorser's name, title, and other biographical information exactly as written in the "Text for Publication Box." Elections staff will review the "Text for Publication Box" to ensure the published text matches exactly.

**Example endorsement text:** " 'This candidate has our full support,' - Maria García, The Cooper Foundation "

- **JCVP-02A form requires:** "Maria García" written in "Endorser Name" field; "The Cooper Foundation" written in the "Organization I am authorized to represent, if any" field; Maria García's signature.
- **JCVP-02B form requires:** "Maria García" written in "Endorser Name" field; "The Cooper Foundation" written in the "Organization I am authorized to represent, if any" field; the text " 'This candidate has our full support,' - Maria García, The Cooper Foundation" printed in the "Text for Publication Box"; Maria García's signature.

**Contact Information**

<p><b>Clackamas County Elections</b>                  1710 Red Soils Ct., Suite 100, Oregon City, OR 97045  <b>Phone:</b> 503-655-8510  <b>Email:</b> elections@clackamas.us</p>	<p><b>Washington County Elections</b>                  2925 NE Aloclek Dr., Suite 170, Hillsboro, OR 97124  <b>Phone:</b> 503-846-5800  <b>Email:</b> elections@washingtoncountyor.gov</p>
<p><b>Multnomah County Elections</b>                  1040 SE Morrison St., Portland, OR 97214  <b>Phone:</b> 503-988-8683  <b>Email:</b> filings@multco.us</p>	<p><b>Yamhill County Elections</b>                  414 NE Evans St., McMinnville, OR 97128  <b>Phone:</b> 503-434-7518  <b>Email:</b> elections@yamhillcounty.gov</p>

# Joint County Voters' Pamphlet

## Statement of Endorsement – Determined by Filer



**Important! Read instructions before completing this form.**

This option allows the **filer** to determine how your name, the name of the organization you represent, if any, and other information about you will appear in their Candidate Statement or Measure Argument. **Use form JCVP-02B to require the filer to publish your name and information about you exactly as you allow.**

**Warning:** Submitting a false signature on this statement is a violation of ORS 251.405, subject to a civil penalty of up to \$1000.

**1. Filing Information** This Statement of Endorsement is valid for the election below

**Election Date:** \_\_\_\_\_

**2. Statement of Endorsement Filing Information**

Candidate Statement                      **Candidate Name:** \_\_\_\_\_

Measure # \_\_\_\_\_                      **Name of Person Who Furnished Argument:** \_\_\_\_\_

**Endorser Name:** \_\_\_\_\_

**Name of Organization I Am Authorized to Represent, if Any:** \_\_\_\_\_

**3. Consent**

I give consent to the filer named on this form to use my name, applicable title, and/or the name of the organization I am authorized to represent, if any, and other biographical information about me or my organization, in a Candidate Statement or Measure Argument.

\_\_\_\_\_  
**Signature**  
(E-signatures must represent the signer's true/"wet" signature to be accepted)

\_\_\_\_\_  
**Date Signed**

\_\_\_\_\_  
**Printed Name**

**Joint County Voters' Pamphlet Statement of Endorsement Instructions**

**When must a Joint County Voters' Pamphlet Endorsement Form (JCVP-02) be filed?**

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You **do not** need a JCVP-02 form for:

- The publication of the candidate's or argument furnisher's own name.
- A publicly published quote that is cited with the source and date.
- A name used for reasons other than support, like referencing a historical figure.

**How to File Statement(s) of Endorsement**

- Submit JCVP-02 form(s) along with the Candidate Statement (JCVP-01) or Measure Argument (JCVP-03) filing.
  - The original or a copy of the JCVP-02 form can be filed in person, by mail, or electronically.
  - For quicker review, organize endorsement forms in the order they are listed in the statement/argument text.
- The county elections office must receive JCVP-02 forms by 5 pm on the filing deadline.
  - JCVP-02 forms cannot be changed or corrected after the deadline.
  - Mailed forms are not counted by their postmark.
- Names and any endorsement text must be included in the statement or argument text, and will count toward the 325-word limit.

**Note:** Filing early offers Elections staff more time to notify you about issues with your Endorsement forms. Issues can be corrected until the 5 pm filing deadline.

**Signature Requirements**

The JCVP-02 form must be signed by the endorsing person or by the endorsing organization's authorized representative. This gives the candidate or argument furnisher permission to publish their name.

- Electronic signatures are accepted if they represent a true/"wet" signature.
- Digital Signatures (digital certificates, typed fonts, etc.) **are not accepted** on JCVP-02 forms.

Unsigned or otherwise incomplete JCVP-02 forms will be rejected. The endorsement will be removed from the statement or argument unless the county elections office receives an acceptable JCVP-02 form by 5 pm on the filing deadline.

**Endorsement Form Options**

**JCVP-02A Form – Filer Determines How to Use Endorser's Name and Information**

- The JCVP-02A form lets the candidate/argument furnisher decide how the endorser's name, title, and other biographical information about them will appear in the Candidate Statement or Measure Argument.

**JCVP-02B Form – Endorser Determines How Their Name and Information Are Used**

- The JCVP-02B form requires the candidate/argument furnisher to publish the endorser's name, title, and other biographical information exactly as written in the "Text for Publication Box." Elections staff will review the "Text for Publication Box" to ensure the published text matches exactly.

**Example endorsement text:** " 'This candidate has our full support,' - Maria García, The Cooper Foundation "

- **JCVP-02A form requires:** "Maria García" written in "Endorser Name" field; "The Cooper Foundation" written in the "Organization I am authorized to represent, if any" field; Maria García's signature.
- **JCVP-02B form requires:** "Maria García" written in "Endorser Name" field; "The Cooper Foundation" written in the "Organization I am authorized to represent, if any" field; the text " 'This candidate has our full support,' - Maria García, The Cooper Foundation" printed in the "Text for Publication Box"; Maria García's signature.

**Contact Information**

<p><b>Clackamas County Elections</b>                  1710 Red Soils Ct., Suite 100, Oregon City, OR 97045  <b>Phone:</b> 503-655-8510  <b>Email:</b> elections@clackamas.us</p>	<p><b>Washington County Elections</b>                  2925 NE Aloclek Dr., Suite 170, Hillsboro, OR 97124  <b>Phone:</b> 503-846-5800  <b>Email:</b> elections@washingtoncountyor.gov</p>
<p><b>Multnomah County Elections</b>                  1040 SE Morrison St., Portland, OR 97214  <b>Phone:</b> 503-988-8683  <b>Email:</b> filings@multco.us</p>	<p><b>Yamhill County Elections</b>                  414 NE Evans St., McMinnville, OR 97128  <b>Phone:</b> 503-434-7518  <b>Email:</b> elections@yamhillcounty.gov</p>

# Joint County Voters' Pamphlet

## Statement of Endorsement – Determined by Endorser



**Important! Read instructions before completing this form.**

This option requires the filer to publish your name, title, the name of the organization you represent (if any), and other information about you exactly as you specify in the 'Text for Publication' box (Box 3). **Use form JCVP-02B to allow the filer to determine how your information is published.**

**Warning:** Submitting a false signature on this statement is a violation of ORS 251.405, subject to a civil penalty of up to \$1000.

**1. Filing Information** This Statement of Endorsement is valid for the election below

**Election Date:** \_\_\_\_\_

**2. Statement of Endorsement Filing Information**

Candidate Statement                      **Candidate Name:** \_\_\_\_\_

Measure # \_\_\_\_\_                      **Name of Person Who Furnished Argument:** \_\_\_\_\_

**Endorser Name:** \_\_\_\_\_

**Name of Organization I Am Authorized to Represent, if Any:** \_\_\_\_\_

**3. Text for Publication** (Cannot be left blank)

In the space below, you must provide **your name and/or the name of the organization you are authorized to represent** exactly as it should appear in the Candidate Statement or Measure Argument. Your organization's name should only be used if the organization is endorsing the Candidate Statement or Measure Argument. Your title must also be listed in this section if it is to appear in the Candidate Statement or Measure Argument.

**4. Consent**

I give consent to the filer named on this form to publish my name, applicable title, the name of the organization I am authorized to represent (if any), and other information about me and/or my organization in a Candidate Statement or Measure Argument **exactly as it appears in the 'Text for Publication' (Section 3).**

\_\_\_\_\_  
**Signature**  
(E-signatures must represent the signer's true/"wet" signature to be accepted)

\_\_\_\_\_  
**Date Signed**

\_\_\_\_\_  
**Printed Name**