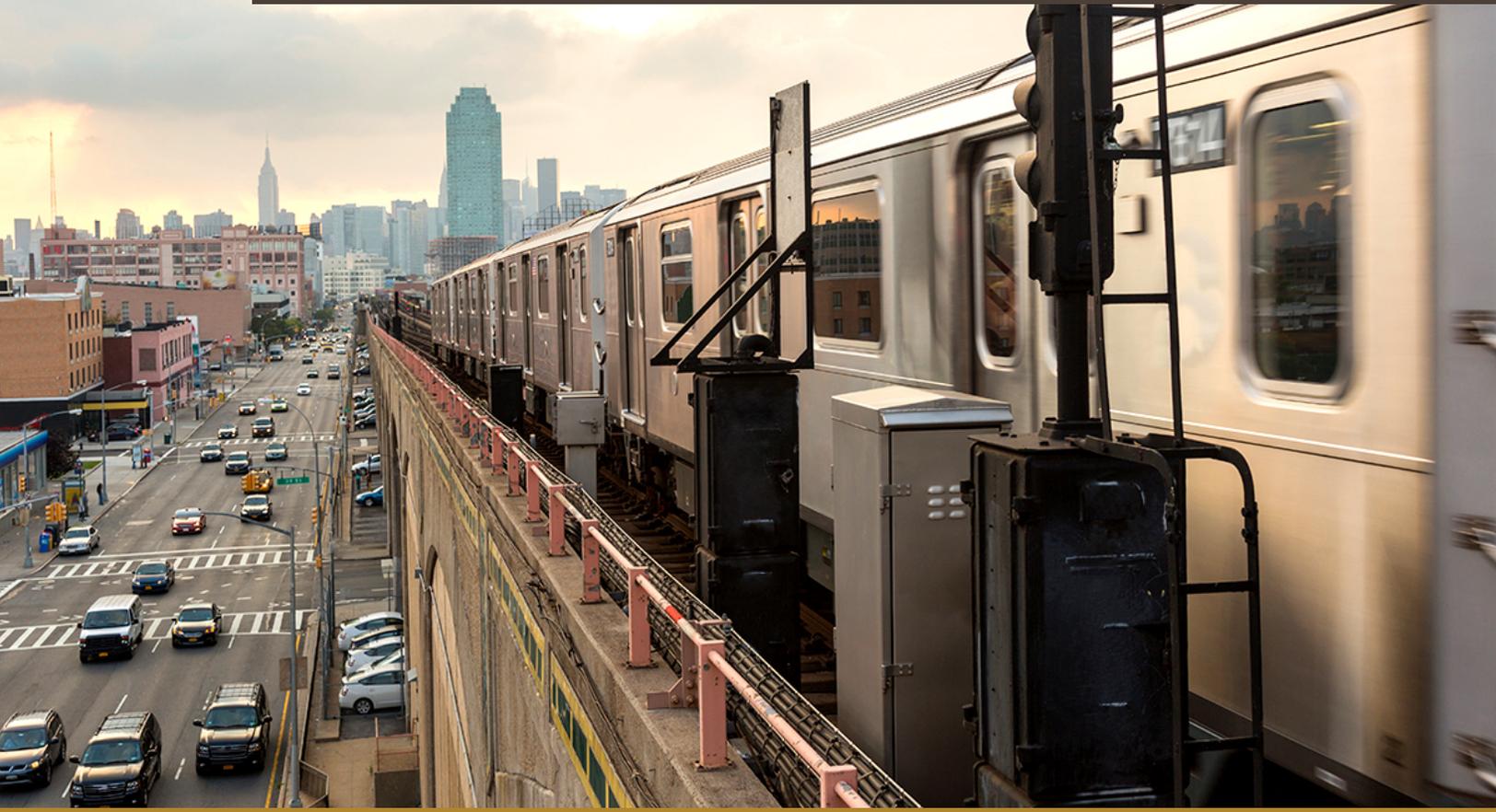




nyc
votes contribute

USER GUIDE

JUNE 2018



NEW YORK CITY CAMPAIGN FINANCE BOARD



NYC VOTES CONTRIBUTE USER GUIDE

WHAT IS NYC VOTES CONTRIBUTE?

NYC Votes Contribute, a platform created by the **New York City Campaign Finance Board** (CFB), is the first of its kind—a fundraising tool for candidates, built as a public good. The CFB created NYC Votes Contribute with the goal of extending our small-dollar matching funds program online. The platform aims to transform political engagement for campaigns, voters, and contributors. Contribute is user-friendly and simplifies the process of collecting credit card contributions online while meeting the CFB’s reporting and recordkeeping requirements. By offering a tool that helps candidates to connect with their supporters and to collect potentially matchable contributions, we hope to make it easier for candidates of all backgrounds to qualify for matching funds and build a viable campaign with the help of small-dollar contributions.

NYC Votes Contribute is exclusively available to CFB-registered campaigns, who can sign up as soon as they register with the CFB.

- ◆ **Contribute** is accessible on desktops, tablets, and smartphones through nycvotes.org, your campaign’s website, or your direct fundraising link.
- ◆ The platform simplifies collecting, reporting, and recordkeeping of credit card contributions and collects required CFB disclosure details.
- ◆ Contribution data and documentation can be uploaded directly to C-SMART.
- ◆ The default contribution amounts are customizable to meet each campaign’s fundraising needs.

This guide provides step-by-step instructions on how to sign up for NYC Votes Contribute and how to connect your account to **Stripe**, the credit card processor that Contribute uses. The User Guide also explains how to use Contribute and describes the contributor’s experience.

NYC VOTES CONTRIBUTE IN THE 2017 ELECTIONS

During the 2017 election cycle, NYC Votes Contribute:

- ◆ Was used to raise \$4.5 million over 28,000 contributions.
- ◆ Was used by 75% of all candidates and 86% of public funds recipients.
- ◆ Helped 50% of campaigns receive public funds.

HOW DO I USE NYC VOTES CONTRIBUTE?

1. SIGN UP AT NYCVOTES.ORG

After submitting a [Filer Registration](#) or [Certification](#) to the CFB, your campaign will have access to NYC Votes Contribute. In order to create your account, go to nycvotes.org and click on the **Login** button in the upper right hand corner.

nyc votes contribute

CONTRIBUTE NOW

VOTING.NYC

ABOUT NYC VOTES

**New Yorkers,
Make Your Voice Heard!**

NYC's Campaign Finance Program gives your small-dollar contribution a *big* impact. The first \$175 you give to a participating candidate for city office can be matched *six-to-one*.

With matching funds, candidates don't have to rely on large contributions from the special interests. That means more New Yorkers from every neighborhood can run for office and ensure city government works for *everyone*.

Contribute to a Candidate

IMPACT TO DATE

54 CAMPAIGNS FOR PUBLIC OFFICE

305 CONTRIBUTIONS

\$92,393 RAISED

LOGIN

2. CLICK THE SIGN UP LINK ON THE NEXT PAGE

Log-in to your account

E-mail Address

Password

Login

New to NYC Votes Contribute? [Sign Up](#)

[Forgot password?](#) [Resend confirmation email](#)

3. CREATE YOUR PASSWORD

Click the **For Candidates** tab and enter the candidate or treasurer's email address listed on your CFB registration and a unique password.

Best practice: Both the candidate and treasurer should create an account.

4. AGREE TO THE AFFIRMATION STATEMENT

Review the affirmation statement and click **Yes, I Agree** in the bottom right hand corner.

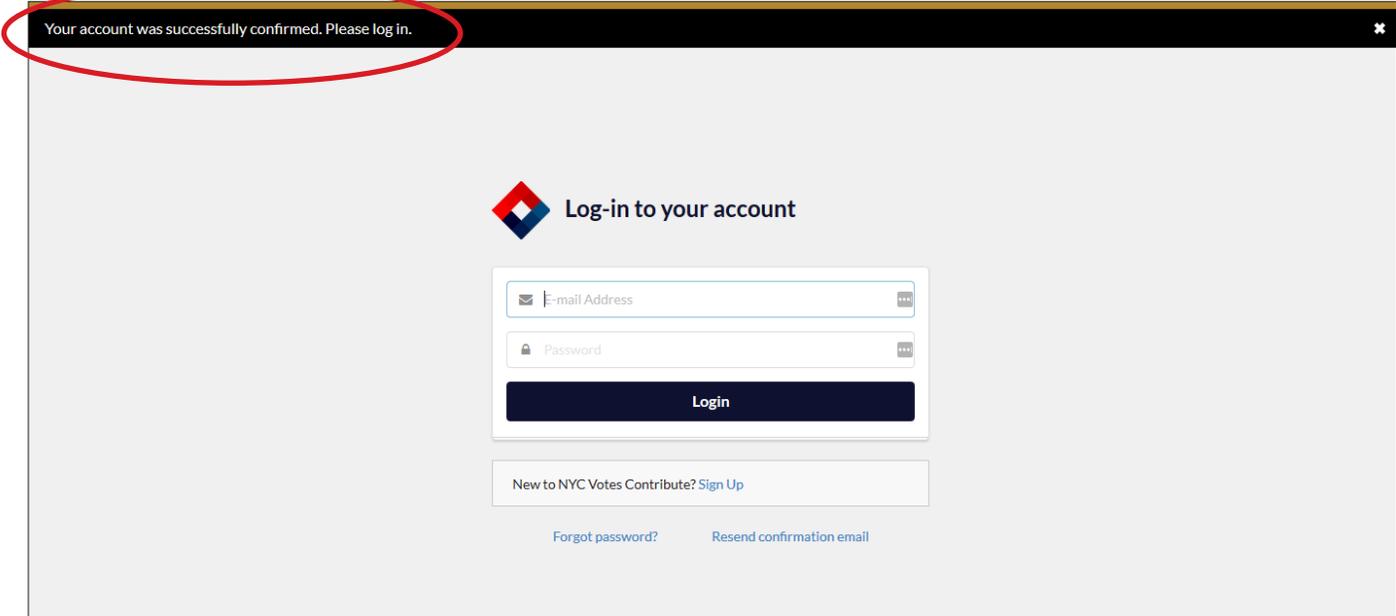
5. ACTIVATE YOUR ACCOUNT

You will receive an email, which will prompt you to activate your NYC Votes Contribute account.

Note: You will not be able to begin receiving contributions until you activate your account.

6. ACTIVATION CONFIRMATION

If you activated your account successfully, you will be prompted to log into your account.



Your account was successfully confirmed. Please log in.

 Log-in to your account

 E-mail Address

 Password

Login

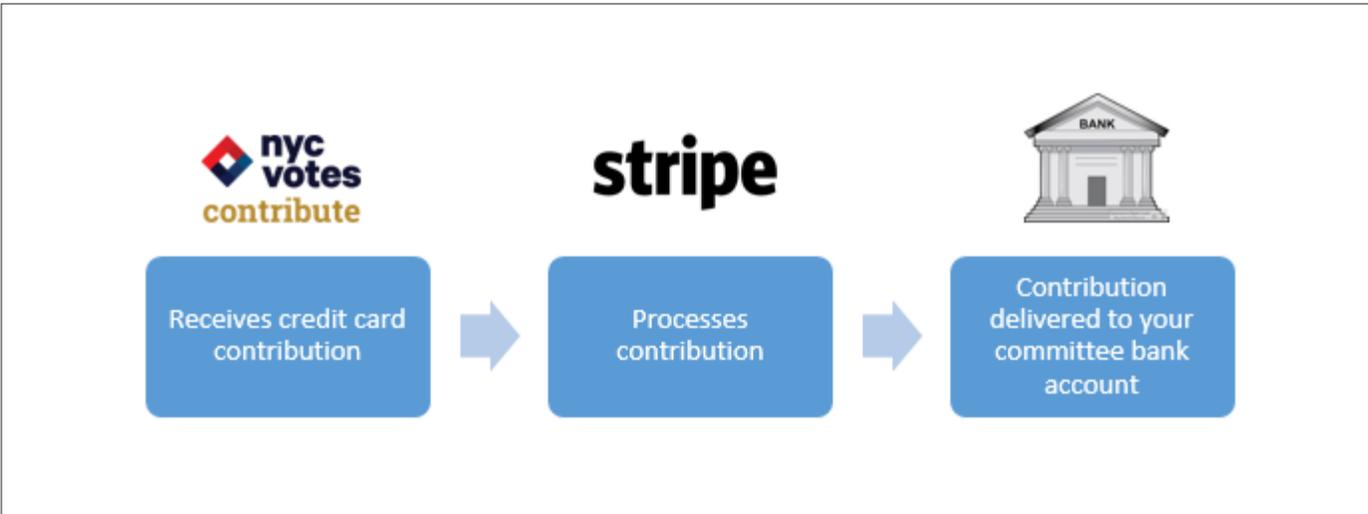
New to NYC Votes Contribute? [Sign Up](#)

[Forgot password?](#)

[Resend confirmation email](#)

7. CONNECT WITH STRIPE

To begin collecting credit card contributions, you must connect your NYC Votes Contribute account with **Stripe**, an online payment processor, which charges a nominal and standard fee (2.9% + \$0.30) for each contribution. Candidates who have run in the past must use a new Stripe account with a different email address for each election.



You will need the following information to create your account with Stripe:

- ◆ Committee's employer identification number (from the IRS)
- ◆ Candidate's date of birth
- ◆ Candidate's Social Security number
- ◆ Committee's bank account number and routing number
- ◆ Committee's website
 - » If your committee does not have a website, you can use www.nycvotes.org for this field.

8. RECEIVE NYC VOTES CONTRIBUTE LINK

After creating your Stripe account, you will receive an email that confirms that your NYC Votes Contribute account has been connected to Stripe and that contains your unique NYC Votes Contribute link. This link can be used for promotional materials, campaign flyers and mailings, and social media posts.

Once you have connected your NYC Votes Contribute account with Stripe, your campaign can begin receiving contributions.

Best practice: Have the candidate or treasurer make a small test contribution (which may be matchable).

NYC VOTES CONTRIBUTE ACCOUNT PAGE

You should familiarize yourself with your NYC Votes Contribute account page after activating your Contribute account and connecting it to Stripe.

In **Contributions**, you can see your contributions and export your NYC Votes Contribute Data Report.

In **Tools**, you will be able to customize the contribution page and set default contribution amounts. You can also find information on how to embed your page on your website, in your campaign emails, and on your social media pages.

Sophia Rosario
City Council | District 25

Contributions (3) | **Tools** | Account Details

Custom Amount Tool

Enter amounts to create your own default contribution amounts for contributors to your NYC Votes campaign page.

\$ 25 \$ 50 \$ 75 \$ 100 \$ 175

Save New Defaults

Direct Contribution Link

Copy and paste this link into an email, tweet, or Facebook post to bring your contributors directly to your contribution page.

DIRECT LINK

<https://nycvotes.es/2zb7UfH>

Copy Tweet Post to FB

Embed Contribution Tool

Embed the NYC Votes Contribute Contribution Tool on your own website. Copy and paste the code below into the HTML of your site.

SMALL EMBED:

```
<iframe src="https://nycvotes-dev.herokuapp.com/campaigns/sophiarosario/contributions/iframe/new" width='320px' height='500px' frameborder="0"></iframe>
```

LARGE EMBED:

```
<iframe src="https://nycvotes-dev.herokuapp.com/campaigns/sophiarosario/contributions/iframe/new" width='800px' height='600px' frameborder="0"></iframe>
```

Please Note:
The iframe embed will only function properly if you have already configured a Stripe account and linked it to your NYC Votes Contribute account.

Transfers to your bank account occur daily and consist of contributions received 2 business days prior. Your first transfer may take up to one week to process. You will receive a Monthly Stripe Account Statement from NYC Votes Contribute, which shows the contributions received for the month as well as the month's lump sum total of Stripe processing fee deducted from your contributions. Your campaign is responsible for reporting these fees as a bill and bill payment in C-SMART.

STRIPE CONTACT INFORMATION

For all Stripe-related inquiries, please visit <https://support.stripe.com> or contact support@stripe.com.

HOW TO UPLOAD YOUR NYC VOTES CONTRIBUTIONS TO C-SMART

After receiving contributions, you must upload your credit card contribution data and documentation directly into C-SMART. You must perform the upload in order for contributions to appear in C-SMART; otherwise, your disclosure statement will not include your NYC Votes contributions and you will lose the opportunity to claim any eligible contributions for matching funds.

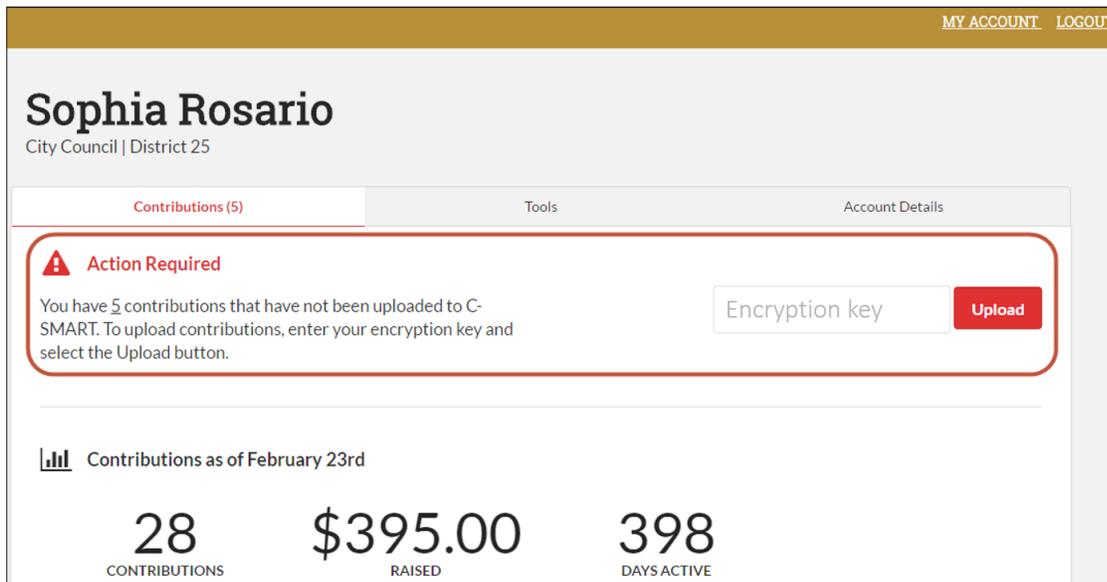
IMPORTANT: Do not manually enter C-SMART contributions received via NYC Votes Contribute. If you notice that a contribution is not uploading correctly into C-SMART, contact your Candidate Services liaison.

1. SIGN IN TO YOUR CAMPAIGN'S NYC VOTES CONTRIBUTE ACCOUNT.

Go to www.nycvotes.org, click on **Login**, and enter your CFB-registered email address and NYC Votes password.

2. ENTER YOUR C-SMART ENCRYPTION KEY.

When you log in, you will be automatically directed to the **Contributions** section of your **My Account** page. NYC Votes Contribute will alert you if you have any contributions that have not been uploaded to C-SMART. To initiate the upload, enter your C-SMART encryption key in the **Encryption Key** field and click **Upload**. You will be able to use the upload function only if there are contributions that have not yet been uploaded to C-SMART.



The screenshot shows the 'My Account' page for Sophia Rosario, City Council | District 25. The page has a navigation bar with 'MY ACCOUNT' and 'LOGOUT'. Below the name, there are three tabs: 'Contributions (5)', 'Tools', and 'Account Details'. A red-bordered box contains an 'Action Required' message: 'You have 5 contributions that have not been uploaded to C-SMART. To upload contributions, enter your encryption key and select the Upload button.' To the right of the message is an input field labeled 'Encryption key' and a red 'Upload' button. Below this, a bar chart shows 'Contributions as of February 23rd' with three statistics: 28 CONTRIBUTIONS, \$395.00 RAISED, and 398 DAYS ACTIVE.

C-SMART DATA UPLOAD

3. READ THE CONFIRMATION MESSAGE.

C-SMART will present you with a confirmation message once you have begun the upload. Read this message very closely—it provides directions for further steps you must take to complete the import process.

You have initiated the process to upload your contributions to C-SMART.

A receipt confirming the success of the upload will be sent to you via email.

To complete the import process, you must:

1. Review each contribution in [C-SMART](#)
2. Merge any duplicate name records (For instructions, click [here](#))
3. Claim any eligible contributions for match.

Log in to C-SMART now and review the NYC Votes Contribution Report. The report is sorted by Import Date so you can identify the contributions imported today and complete Steps 1, 2, and 3.

WARNING: If you do not perform these steps prior to the submission of your next disclosure statement, you will miss the opportunity to claim eligible contributions for match. Failure to merge duplicate name records may result in over-the-limit contributions, subject to penalty.

[Return to My Account](#)

4. REVIEW EACH CONTRIBUTION IN C-SMART.

Review the **NYC Votes Contributions Report** in C-SMART to ensure that each contribution was uploaded properly. For more information on how to access and use this report, review [Reports in C-SMART Help](#). You should also compare the total number of contributions on the C-SMART report to the total number displayed in the **NYC Votes Contribute Data Report**, which is accessible through your My Account page in NYC Votes. To have this report sent to you by email, click on **Email Contribution Data Report** from the **Contributions** section of your **My Account** page. If you notice any discrepancies, contact your Candidate Services liaison.

[MY ACCOUNT](#) [LOGOUT](#)

Sophia Rosario

City Council | District 25

Contributions (0)ToolsAccount Details

You have either reported all of your contributions, or have not received any.

Contributions as of March 2nd

28	\$395.00	398
CONTRIBUTIONS	RAISED	DAYS ACTIVE

NYC Votes Contribute Data Report

The NYC Votes Contribute Data Report provides a spreadsheet containing contributor and credit card processing information for all contributions your campaign receives through the Contribution Tool. This file is for your campaign's internal use only and should be reviewed prior to submitting the next disclosure statement. Make sure the total number of contributions on this spreadsheet matches the total number of contributions on the C-SMART NYC Votes Contributions Report. Use the button below to send the NYC Votes Contribute Data Report to your registered email address.

Email Contribution Data Report

Best practices:

- ◆ Make sure that the total number of contributions found in the NYC Votes Contribute Data Report matches the total number found in the C-SMART NYC Votes Contributions Report exactly.
- ◆ From each contribution's Monetary Contribution screen in C-SMART, you can review the backup documentation automatically imported by NYC Votes Contribute. For more information on viewing this documentation, see **[How to View Monetary Contribution Documentation in Monetary Contributions](#)**.
- ◆ You should review the NYC Votes Contribute Data Report to see whether the AVS (Address Verification System) check for a New York City resident's contribution that you want to claim for match passed or failed. This information is displayed in the "Address Verification" column of the report. If you notice that the "Address Verification" field displays "fail," look at the "Billing Address Same as Residential" field to see if the contributor indicated that the billing address is different (displayed as "no"). Then, review the "Reason Billing / Residential Differ" column to see if the contributor provided an explanation. If the contributor did not provide an explanation for why the billing and residential addresses differ, you should reach out to the contributor and ask them to complete an **[Address Verification letter](#)** in order for the contribution to be eligible for matching funds.

5. MERGE ANY DUPLICATE NAME RECORDS.

The upload from NYC Votes Contribute to C-SMART might result in duplicate name records in your C-SMART database. This occurs when a C-SMART name record already exists for someone who contributes through NYC Votes Contribute. You must merge any duplicate names after each upload. This ensures that your disclosures are accurate and helps prevent over-the-limit contributions. For more information, see **[Merge Duplicate Names](#)**.

6. CHECK FOR OVER-THE-LIMIT CONTRIBUTIONS

Review your contributions for any over-the-limit contributions. The easiest way to do this is to generate the Contributions Over the Limit report in C-SMART, which provides a list of contributions that are above the acceptable limits.

7. CLAIM ELIGIBLE CONTRIBUTIONS FOR MATCH.

NYC Votes Contribute does not automatically claim any contribution for match. After each upload, you must modify your NYC Votes contributions in C-SMART to enter a matching amount. For more information on how to edit contributions to claim them for match, see the **[Help content for Monetary Contributions](#)**.

- ◆ Use the NYC Votes Contributions Report in C-SMART to assist you when claiming NYC Votes contributions for match. The report contains each contribution's C-SMART transaction ID and the matching amount; additionally, the report includes an indicator that tells you whether the matching amount has been updated. For assistance in accessing and using this report, review the **[Help content for Reports](#)**.

8. ENTER BILLS AND BILL PAYMENTS FOR STRIPE FEES.

As mentioned earlier, you must connect your NYC Votes Contribute account to **Stripe** in order to process your contributions. The Monthly Stripe Account Statements that you receive by email will include the total Stripe fees paid in the month. You must enter a bill and bill payment to Stripe in C-SMART each month for that amount. The date of the bill and bill payment should be the last day of the statement month. For more information about adding bills and bill payments, review the [Help content for Bills](#).

- ◆ When entering Stripe as a vendor in C-SMART, be sure to include the company's address: 185 Berry Street, Suite 550, San Francisco, CA 94107. For more information about adding a name record, see the [Help content for Names](#).
- ◆ If no Stripe fees were charged for a given month, you do not need to enter a bill and bill payment in C-SMART for that month.

CONTRIBUTOR EXPERIENCE

NYC Votes Contribute allows supporters to contribute quickly and efficiently to campaigns. Contributors do not need to have an account on NYC Votes Contribute in order to make contributions.

1. NYC VOTES CONTRIBUTE HOME PAGE

- ◆ Visitors can access the Candidate List by clicking on the **Contribute to a Candidate** button in the center of the page, or the **Contribute Now** tab in the sidebar.
- ◆ General information on NYC Votes can be found in **About NYC Votes** in the sidebar. You can also find **FAQs for Candidates** in this section.
- ◆ For voter education information, visitors can click on the **Voting.NYC** link in the sidebar.

LOGIN

New Yorkers, Make Your Voice Heard!

NYC's Campaign Finance Program gives your small-dollar contribution a *big* impact. The first \$175 you give to a participating candidate for city office can be matched *six-to-one*.

With matching funds, candidates don't have to rely on large contributions from the special interests. That means more New Yorkers from every neighborhood can run for office and ensure city government works for *everyone*.

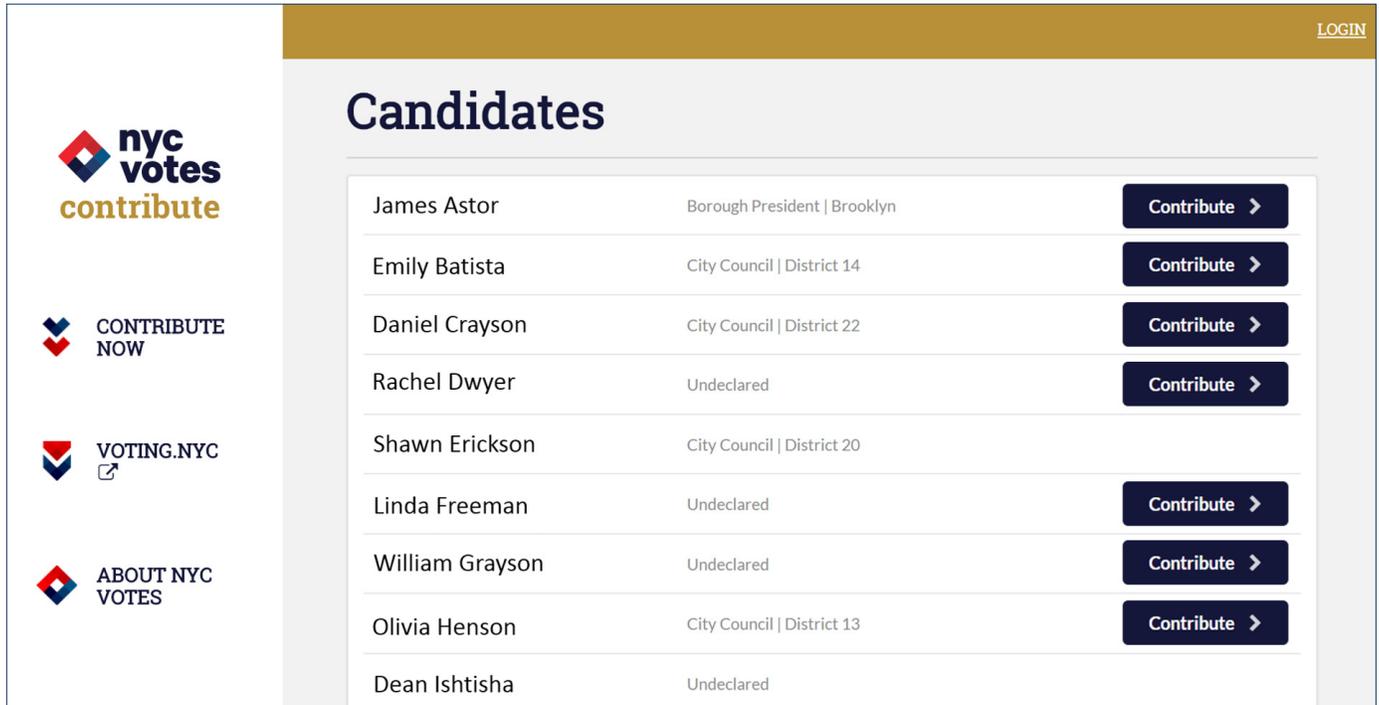
[Contribute to a Candidate](#)

54
CAMPAIGNS FOR PUBLIC OFFICE

305
CONTRIBUTIONS

\$92,393
RAISED

2. CANDIDATE LIST



The screenshot shows the 'Candidates' page on the NYC Votes Contribute website. The page has a gold header bar with a 'LOGIN' link in the top right corner. On the left side, there is a sidebar with the 'nyc votes contribute' logo and four navigation links: 'CONTRIBUTE NOW', 'VOTING.NYC', and 'ABOUT NYC VOTES'. The main content area is titled 'Candidates' and features a list of ten candidates. Each candidate's name is followed by their title and location, and a dark blue 'Contribute' button with a right-pointing arrow.

Candidate Name	Title/Location	Action
James Astor	Borough President Brooklyn	Contribute >
Emily Batista	City Council District 14	Contribute >
Daniel Crayson	City Council District 22	Contribute >
Rachel Dwyer	Undeclared	Contribute >
Shawn Erickson	City Council District 20	Contribute >
Linda Freeman	Undeclared	Contribute >
William Grayson	Undeclared	Contribute >
Olivia Henson	City Council District 13	Contribute >
Dean Ishtisha	Undeclared	Contribute >

- ◆ The Candidate List shows all candidates registered with the CFB for the current election cycle in alphabetical order by last name.
- ◆ Only candidates who are using NYC Votes Contribute to fundraise will have a Contribute button next to their name.
- ◆ In order to make a contribution to your campaign, visitors must click on the **Contribute** button.

3. AMOUNT

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

How much would you like to contribute?

\$25 \$50 \$75

\$100 \$175 \$ Other .00

NYC resident? With matching funds, your \$25 contribution can be worth \$175

Next →

- ◆ Visitors can select the amount they would like to contribute based on your campaign's customized pre-set amounts, or the default amounts as shown above.
- ◆ If you have declared an office, NYC Votes Contribute will not allow an over-the-limit contribution for the office sought. **Note:** Doing business contribution limits will only be applied if "Yes" is selected in the Doing Business screen (see Step 6).
- ◆ If you have not declared an office, you can receive contributions from individuals up to the citywide office limit (\$5,100). Note that if you end up running for City Council or borough president, you will need to refund any over-the-limit portions of contributions.

4. EMPLOYMENT STATUS

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

What is your current employment status?

- Employed
- Self-Employed
- Retired
- Homemaker
- Student
- Unemployed

← Back Next →

- ◆ To comply with CFB reporting requirements, visitors must provide their current employment information.

- ◆ Choosing *Retired, Homemaker, Student, or Unemployed* will skip the next screen and take visitors directly to the Doing Business screen.

5. EMPLOYMENT INFORMATION

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

Please enter the following details about your employer:

Employer ABC Designs	Occupation Designer	
Business Street Address 123 Church Street	Apt / Suite / Floor Apt / Suite / Floor	
City New York	State NY	Zip 10007

← Back
Next →

- ◆ If visitors select *Employed or Self-Employed*, they will be directed to fill in their employment information in order to continue.

6. DOING BUSINESS

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

Are you an owner, principal officer or senior manager of an organization that does or is proposing to do business with the City?

Yes
 No

i If a contributor has business dealings with the City as defined in the Campaign Finance Act, such contributor may give only up to \$250 for city councilmember, \$320 for borough president, and \$400 for mayor, comptroller or public advocate.

[Find out the rules on contributions from people doing business with the City of New York](#)

← Back
Next →

- ◆ To ensure compliance with the **doing business contribution limits**, visitors will be asked if they are doing business with the City of New York.

- ◆ If they are doing business with the city, the visitor will only be allowed to make a contribution up to the doing business contribution limit.
- ◆ To determine if someone is subject to the doing business contribution limits, search the [Doing Business Database](#).

7. PERSONAL INFORMATION

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

Please enter the following personal information:

First Name: Last Name:

Residential Street Address: Apt / Suite / Floor:

City: State: Zip:

Email Address: Telephone # (optional):

[← Back](#) [Next →](#)

- ◆ All fields are required in this screen, except for the telephone number field.
 - » Dashes and parentheses are not allowed in the Telephone Number field.
- ◆ The Residential Street Address field will autosuggest an address once a character has been entered in that field.
 - » If the correct address does not auto-populate, visitors can enter a character in that field and then hit Enter. This will allow for the manual entry of an address, as shown below.

Residential Street Address: Apt / Suite / Floor:

8. BILLING ADDRESS

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

Is your billing address the same as your residential address?

Yes

No

[← Back](#) [Next →](#)

- ◆ For address verification and matchability purposes, it is important that visitors answer this question accurately.
- ◆ Visitors should only answer yes to this question if the residential address they provided in the Personal Information screen exactly matches the billing address they have on file with their credit card company.
- ◆ If the residential address provided in the Personal Information screen does not match the billing address on file with the credit card company, the contributor must provide an explanation on the next screen.
- ◆ Note: Address verification will fail if a contributor answers yes to this question but the residential address provided does not actually match the billing address they have on file with their credit card company. Address verification failure can lead to invalidating a contribution for match. The contributor will then need to provide an [Address Verification affirmation letter](#).

9. BILLING ADDRESS INFORMATION

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

My credit card billing address differs because:

- My card is billed to my work address.
- I recently moved.
- My card is billed to a P.O. Box or mail drop.
- Other.

i Although my billing address is different than my home address, the card is paid from my personal funds.

[← Back](#) [Next →](#)

- ◆ If no was selected in the previous screen, a reason must be provided for the difference in residential and billing addresses.

10. CREDIT CARD INFORMATION

CITY COUNCIL | DISTRICT 25

Sophia Rosario

Sophia for Council

Please enter the following credit card information:

Card Number

Expiration

CVC

[← Back](#) [Make \\$25 Contribution](#)

- ◆ Visitors will be asked for their credit card information. Once they complete all fields, they will be able to click the Contribution button, which will also confirm the amount they are about to give.

11. CONTRIBUTION AFFIRMATION

Contribution Affirmation

By clicking "I agree," you (1) acknowledge that you have read and agree to the [Terms and Conditions](#) for using this site; (2) authorize the campaign's payment processor to charge your account for the contribution amount; (3) confirm that the information provided by you is true, complete, and correct to the best of your knowledge and is supplied in good faith; (4) confirm that you are authorized to make this contribution using the credit or debit card information included in your payment instructions; (5) confirm that you are a natural person and not an organization of any kind including, but not limited to, corporations, partnerships, political committees, or labor unions; and (6) affirm the following statement:

I understand that State law requires that a contribution be in my name and be from my own funds. I hereby affirm that I was not, nor, to my knowledge, was anyone else, reimbursed in any manner for this contribution; that this contribution is not being made as a loan; and that this contribution is being made from my personal funds or my personal account, which has no corporate or business affiliation.

[Go Back](#) [Yes, I Agree](#) ✓

- ◆ Prior to completing their contribution, visitors must agree to the required affirmation statement. This is the final step of the contribution process.

12. CONTRIBUTION CONFIRMATION

Contribution Received!

Your contribution to Sophia Rosario was successful.

Contributions like yours help ensure candidates can run for office with the support of their friends and neighbors, instead of relying on big money from special interests.

A receipt will be emailed to you shortly with the following information:

<i>Personal Information</i>	
Name	Evan Baker
Residential Address	34-35 Jordan Street Flushing, NY 11358
Telephone	2124091800
Email	evan.baker@gmail.com
<i>Billing Information</i>	
Credit Card	XXXX-XXXX-XXXX-4242
Expiration Date	4/2024
<i>Employment Information</i>	
Employment Status	Employed
Occupation	Designer
Employer	ABC Designs
Employer Address	123 Church Street New York, NY 10007
Doing Business	No

Click here to save your information and make fast, secure contributions in the future.

[Sign Me Up!](#)

- ◆ Once the contribution has been processed successfully, visitors will arrive at this final screen.
- ◆ A confirmation will be sent to the e-mail provided in the Personal Information screen. Your campaign will also receive an e-mail with the contribution information.
- ◆ To make additional contributions, visitors can sign up for an NYC Votes account by clicking **Sign Me Up!** in the right-hand corner.
- ◆ If any contribution information is incorrect, contributors can e-mail CSUMail@nyccfb.info.