

IEDS Help:

Contributions



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Entering a Contribution from a New Contributor

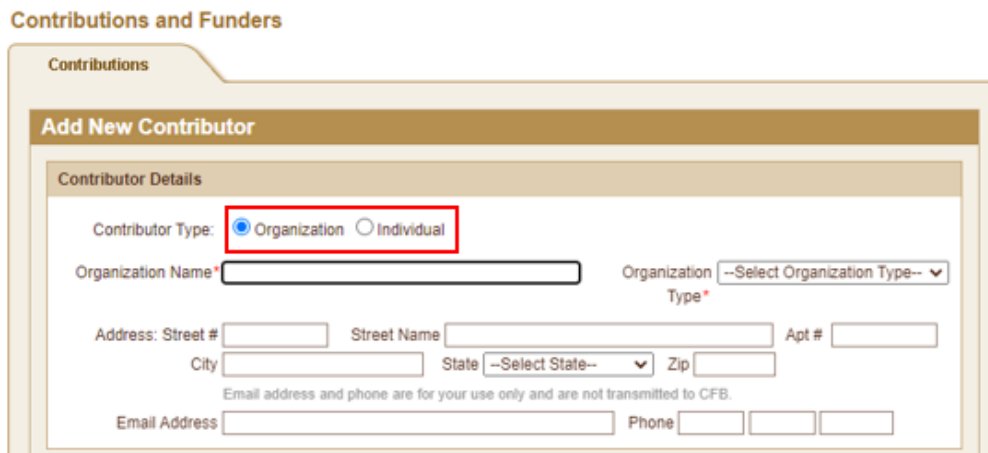
Contribution reporting is required after you have spent \$5,000 or more on covered communications that feature a specific candidate. All contributions received from organizations on or after January 1 of the year preceding the election are reportable; contributions from individuals that aggregate to \$1,000 or received within a year of the election date (both primary and general) are reportable. IEDS will automatically include contributions you have entered in the first report you submit after triggering the requirement.

The first step for entering a contribution from a new contributor is to create a contributor record; if you are unsure if you have previously created a record for the contributor, you should type their name into the search bar before proceeding to Step 1 of this section. If a contributor record already exists, see [Entering a Contribution from an Existing Contributor](#).

1. Click on **Contributions** in the sidebar of the IEDS home screen and click on **My Contributor is not in this list**.



2. Select **Organization** or **Individual** on the **Add New Contributor** screen. Enter all information related to the Contributor.



◆ **NOTE:** You must report the full address of all contributors; however, only the **City, State, and Zip** will be disclosed to the public. Red asterisks indicate fields required by IEDS to save the record.

3. Enter the **Contribution Date** and **Contribution Amount** at the bottom of the window. If the contributor is an organization, click **Next** to finish your entry. If the contributor is an individual, there is nothing more to enter, so you'll be able to **Save** now.

4. Answer all **Contributor Leadership** questions by clicking the **Yes** or **No** for each category.

Contributor Leadership

Does the contributor have Principal Owners or Partners with at least 10% Ownership? Yes No Add New Principal Owner

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

Does the contributor have Principal Officers? Yes No Add New Principal Officer

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

Does the contributor have Board Members? Yes No Add New Board Member

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

- In each category with a **Yes** response, complete entries for each individual Owner, Partner, Officer, and/or Board Member by clicking on the **Add New** button. Click **Save** once you have entered all data.

Contributor Leadership

Does the contributor have Principal Owners or Partners with at least 10% Ownership? Yes No Add New Principal Owner

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

Does the contributor have Principal Officers? Yes No Add New Principal Officer

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

Does the contributor have Board Members? Yes No Add New Board Member

Last Name	First Name	Occupation	Organization Title	Employer Name	Employer Location	Actions
No Records						

Add New Principal Owner ×

Name: First* MI Last* Suffix

Organization Title

Employer Name Occupation

Employer City Employer State

- After you have entered all **Contributor Leadership** information, click **Save** at the bottom of the page.
 - NOTE:** If the organization has contributed \$50,000 or more in total, they are considered a **Major Contributor** and you are required to report their **Major Funders**. See [Entering Major Funder Information](#) for instructions.

Entering a Contribution from an Existing Contributor

1. Click on **Contributions** in the sidebar of the IEDS home screen and search for the contributor or select them from the drop-down list by clicking ↓.

Contributions

Contributor Search

Name ↓ **My Contributor is not in this list**

Search Individuals (Last Name, First Name) or Organization Name

2. Once you've found the contributor, click **Add New Contribution**

Contributor Name	Contributor Address	Actions
▶ ABC Corp.	123 Main Street, Anytown, NY	

Contributions From: ABC Corp.

Contribution Date	Contribution Amount	Actions
01/01/2023	\$100,000.00	
Total: \$100,000.00		

3. Enter the **Contribution Date** and **Contribution Amount** in the **Add New Contribution** panel and click **Save**.

Add New Contribution

Contribution Date*
(mm/dd/yyyy)

Contribution Amount*

Entering Major Funder Information

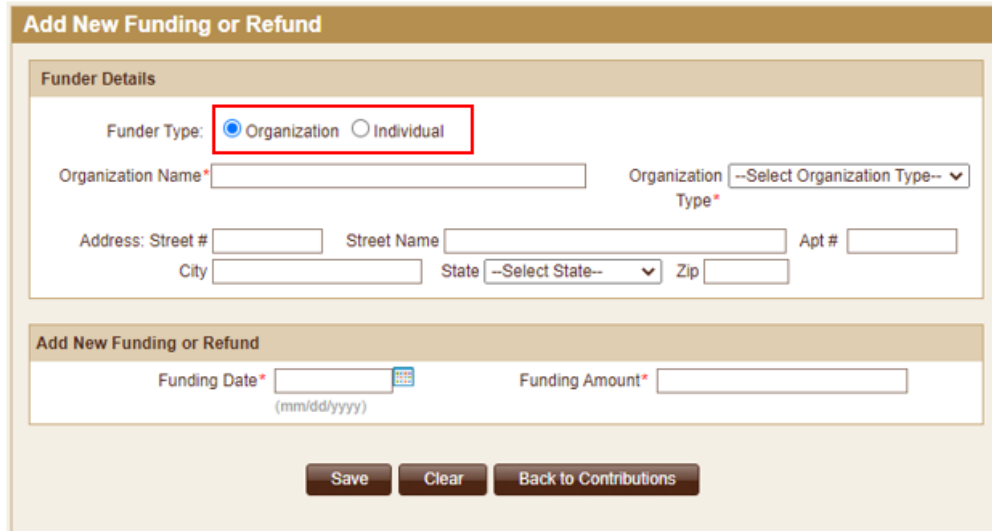
An organization that gives you \$50,000 or more in the year preceding the election is considered a **Major Contributor**; for each of these contributors, you must obtain and disclose information on that organizations **Major Funders**, which are defined as organizations or individuals that give the **Major Funder** \$25,000 or more in the year preceding the election.

1. From the **Contributions** page, search for the contributor or select them from the drop-down menu by clicking ↓; click on **Edit** to open their **Contributions and Funders**

page.

2. Click on the **Funders** tab. If you have entered funding from this entity before you can search for them or select them from the list [↓]; if you have not, click **My Funder is not in this list**.

3. Select **Organization** or **Individual** on the **Add New Funding or Refund** page and enter all information for the funder; once you have entered the information click save.



- ◆ **NOTE:** You must report the full address of all contributors; however, only the **City, State, and Zip** will be disclosed to the public. Red asterisks indicate fields required by IEDS to save the record.

4. Repeat steps 2-3 as necessary to enter all **Major Funder** information for your **Major Contributor**.

- ◆ **NOTE:** It is the responsibility of the independent spender to obtain this information and report it to the CFB. As a best practice, you should ask for this information at the time of the first large contribution from an organization.

Editing a Contributor, Contribution, or Funder

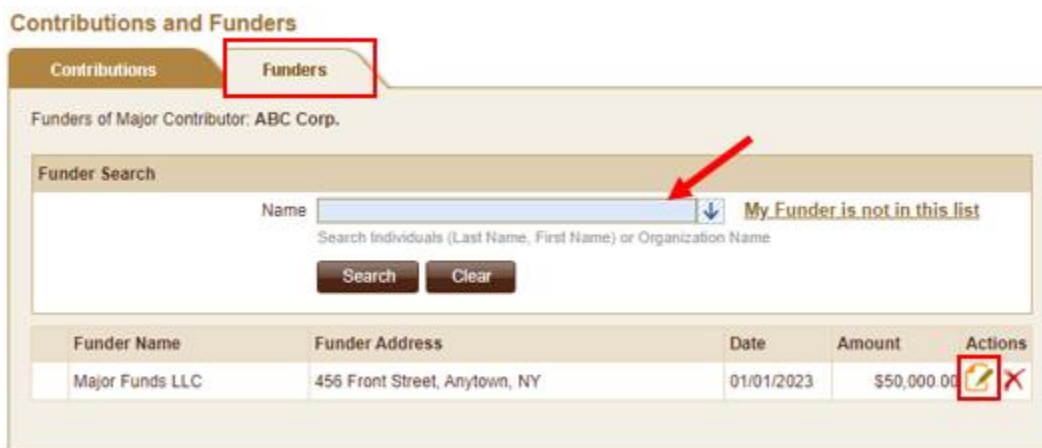
1. From the **Contributions** page, search for the contributor or select them from the drop-down menu.



2. If editing a **Contributor** or **Funder**, click **Edit** indicated by the red box; if editing a **Contribution**, click on the edit button indicated by the blue box.



If editing a **Funder**, click on the **Funders** tab and search for the entity or individual; click on the edit button.



3. Enter and/or modify data as necessary; click **Save** when finished.

Refunding a Contribution

A **Refund** should be entered when you have received a **Contribution** that was subsequently returned to the contributor. If you need to remove an erroneously entered **Contribution**, please see [Deleting a Contribution](#).

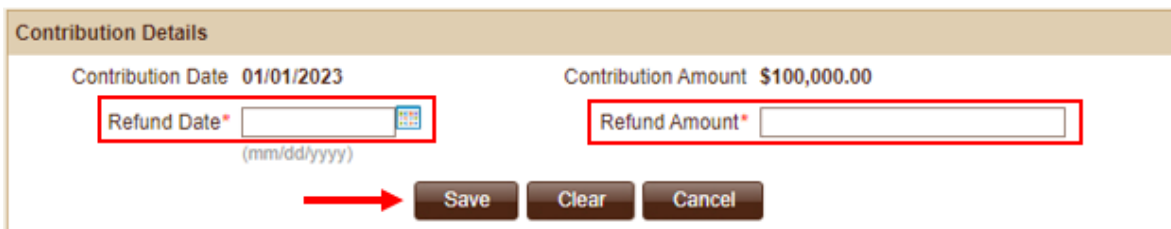
1. From the **Contributions** page, search for the contributor or select them from the drop-down menu.



2. Once you have found the correct **Contribution**, click the **Refund** button under **Actions**.



3. Enter the **Refund Date** and **Refund Amount** in the **Contribution Details** panel and click **Save**.



Deleting a Contribution

A **Contribution** should be deleted only if it was erroneously entered (e.g., duplicative entry, etc.). If a **Contribution** was received and subsequently returned to the contributor, please see [Refunding a Contribution](#).

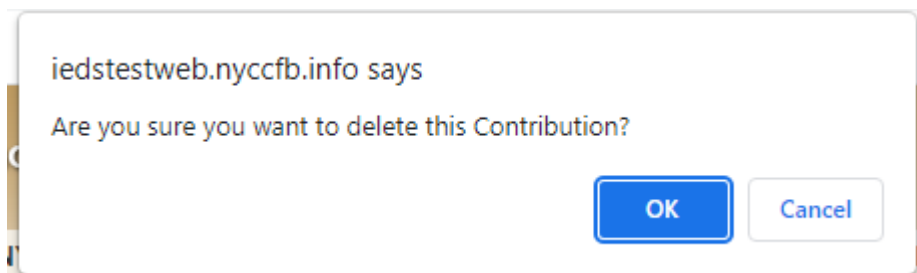
1. From the **Contributions** page, search for the contributor or select them from the drop-down menu.



2. Once you have found the correct **Contribution**, click **Delete** under **Actions**.



3. Click **OK** on the pop-up notification.



- ◆ **NOTE:** Contributions should only be deleted if they were erroneously entered. If a contribution was received and subsequently returned to the contributor, see [Refunding a Contribution](#).