

Maine Campaign Finance E-Filing Help: Loans and Loan Payments

Adding a Loan:

Once you are logged in, you can add a new loan from anywhere on the website. Simply go to the button at the top of page, click it to open a menu, and then choose Loans.

+ NEW TRANSACTION



This will bring up a box where you can enter the details of the loan. You are required to select the election the loan is for, the source type and details of the lender, as well as the amount and date of the loan. Any field underlined in red must be completed before you can save the loan.

A) Election Type - Choose whether the loan is for the Primary or General election.

B) Source Type - A dropdown menu containing the same options for a contribution, i.e. Individual, Commercial Source, Candidate, etc.

C) Loan Source - Enter the name of the lender; if you have not used that lender previously, you will be able to "+Add New."

D) Amount & Date - Provide the amount and date of the loan.

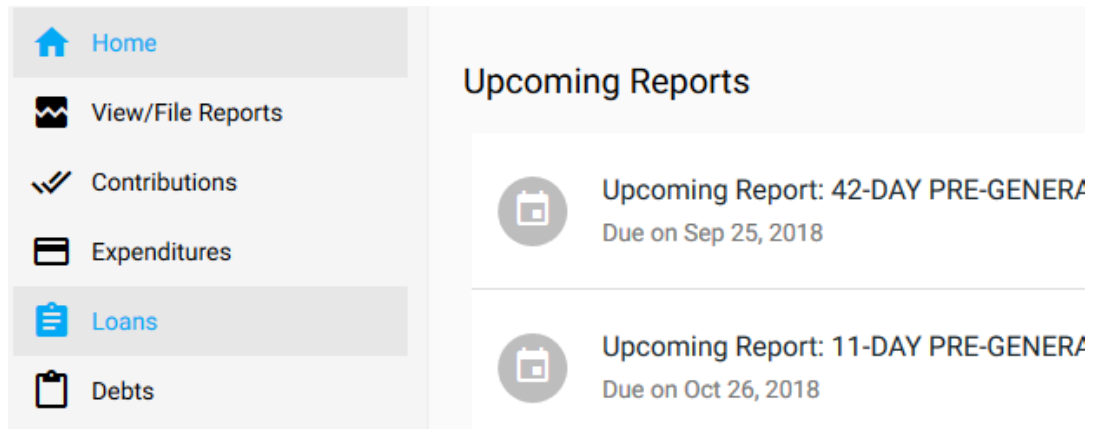
E) Save Button - Unless this button is blue, not all of the required information has been entered, and the loan cannot be saved yet.

In many respects, entering a loan is the same as entering a contribution. Please refer to the guidance on Contributions if you require assistance with the above described fields.

The loan has been successfully added.

Once a loan has been saved, you can manage it by going to the Loans section of the website:

From there you will be able to make changes to the loan or record payments to it. You can also make changes to saved payments.



Source	Election	Date	Amount	Current Balance	Closed	Filed Date	Amended
Doe, John	General	07/24/2018	\$400.00	\$400.00			

Clicking the to the right of the loan on the Loans page and selecting "Edit" will bring up a box where you can make changes to the loan. Click the button in the lower right-hand corner to begin making your changes.

Edit & Amend

Edit (if the loan has not been filed) and Amend (if the loan has been filed), allows you to change the election, date, and amount of the loan. If the loan has not been filed in a report, you can also change the source and details. If the loan has been filed and you need to change the source type, you will need to delete the loan, and add it again. See the guidance on Contributions for details on these processes.

Payment

To make a whole or partial payment on a loan, select this option to enter the date and amount of the payment. See next page.

Forgive

This option will convert any portion of the remaining balance of the loan to a contribution.

Delete

If a loan was entered in error, or it's been filed and you need to change the source type, you need to delete the debt. You will be asked to confirm if you want to delete once you select that option. Once a payment has been made, a loan cannot be deleted.

Maine Campaign Finance E-Filing Help: Loans and Loan Payments, *cont.*

Making a Payment:

After selecting "Payment," the bottom of the Loan window will expand to reveal the Payment options.

Loan Balance
400.00

Payment

Amount A Date

Reason

B SAVE

A) Amount & Date - Provide the amount of the payment and the date on which it was made.

B) Save Button - Unless this button is blue, not all of the required information has been entered, and the payment cannot be saved yet.

Forgiving a Loan:

After selecting "Forgive," the bottom of the Loan window will expand to reveal the Forgiveness options.

Loan Balance
300.00

Forgive

Amount A Loan Forgiveness Date

Reason

B SAVE

A) Amount & Date - Provide the amount of the forgiveness and the date on which it was made. All or part of the loan balance may be forgiven.

B) Save Button - Unless this button is blue, not all of the required information has been entered, and the payment cannot be saved yet.

Editing a Payment or Forgiveness:

Once you have created a loan and added payments, you can use the Edit function to edit the loan or make another payment (the Delete option is removed once a payment has been made). The carat **(A)** will expand the loan to reveal the payments that have been added and allow access to the Edit function for the payment or forgiveness **(B)**.

Loans								
Source	Election	Date	Amount	Current Balance	Closed	Filed Date	Amended	
A ^	Doe, John	General	07/24/2018	\$400.00	\$100.00	07/17/2018		⋮
		Payment	07/31/2018	\$100.00				B ⋮
		Forgive	07/31/2018	\$200.00				⋮

1-1 of 1

Loan Payment

Election Type
General

Source Type
Individual

Loan Source
Doe, John

Amount Date
400 07/24/2018

Description

Loan Balance
300.00

Payment

Amount Date
100.00 07/31/2018

Reason

Actions
Edit
Delete

Click the **Actions** button in the lower right-hand corner to begin making your changes.

Edit & Amend

Edit (if the payment/forgiveness has not been filed) and Amend (if the payment/forgiveness has been filed), allows you to change the date and amount of the payment.

Delete

If the payment was entered in error, you may delete the payment. You will be asked to confirm if you want to delete once you select that option.