

Electronic Filing of Campaign Disclosure Reports



STATE BOARD OF ELECTIONS
CAMPAIGN DISCLOSURE DIVISION

This brochure is not a complete or fully detailed digest, but an overview intended to help in understanding electronic filing of campaign disclosure reports. Some of the language in this brochure is presented in simplified form, and should not be considered a substitute for applicable law.

For more complete and authoritative guidance concerning all areas of campaign financial disclosure, refer to actual statutory language and to the State Board of Elections Rules and Regulations. Consultation with professional legal counsel is also encouraged. Additionally, assistance from the State Board of Elections or other governmental authorities, where jurisdiction exists, is encouraged.

WHO IS REQUIRED TO FILE DISCLOSURE REPORTS ELECTRONICALLY?

If a political committee has \$10,000 or more in receipts or expenditures, or has a balance of \$10,000 or more at any time during a reporting period, its disclosure reports must be filed electronically. Once a committee passes the electronic filing threshold it must file all reports electronically, even if it drops back below the threshold. If a committee is required to file electronically, paper filings of reports will no longer be accepted. The Board encourages all political committees to file electronically, even if they do not reach the mandatory electronic filing threshold. Committees that have not reached the threshold have the option of filing any given report electronically or on paper.

WHAT IS IDIS?

IDIS stands for Illinois Disclosure Information System. It is the electronic filing system provided free of charge by the State Board of Elections for use by political committees filing Illinois campaign disclosure reports. The current version, IDISv3.0 is a web-based system, allowing users to prepare and file their reports electronically, 24 hours a day, 7 days a week. The system can be accessed from multiple computers, and more than one person can enter data at the same time. Committee data is stored on the Board's secure server, and is automatically backed up and saved, but no reports or data are transferred to the Board unless a report is filed.

To prepare a report using IDIS, all you have to do is enter some basic information about your committee, then enter information about receipts and expenditures. IDIS will prepare the report and all necessary schedules. IDIS will compute all totals, determine whether data should be itemized and determine if an employer and occupation must be disclosed. IDIS requires that you enter names and addresses only once. After that, they will be available for all subsequent filings and can easily be changed if needed. You can view a report at any time and see what it would look like if filed at that point. You can also validate a report to determine if there are any errors or if information required by law is missing (such as an address, employer and occupation information or a description of an expenditure). The system will also prompt you if a report or amendment needs to be filed.

The IDIS system can be used with any computer, provided it has an active internet connection.

HOW CAN I START USING IDIS?

Before you can begin using IDIS you must have filed a Statement of Organization with the Board. Then, you must set up a Filer Account by calling Campaign Disclosure staff at the Board. To create a Filer Account, a committee must choose a user name (no more than 12 characters long) and password (at least 6 characters, case-sensitive) and provide the name of at least one contact person, along with a phone number, 4-digit PIN number unique to that person and an e-mail address. A second contact person may also be designated. Password and contact person information may be changed if necessary.

The user name and password created by the committee serve as an electronic signature for filing reports. A report may be filed only if the password matches the security information on file with the Board, so it is important to keep the password and user name secure.

Once the Filer Account is established, the IDIS system is available on the Board website, www.elections.il.gov, either from a link in the Spotlight section of the homepage, or through a link on the Committees page of the website.

HOW DO I CHANGE A PASSWORD OR CONTACT PERSON?

If you need to change a password or add or change a contact person, call the Board. The information can only be changed if a current contact person contacts the Board and provides their 4-digit personal identification number. This is why two contact people are recommended, even though only one is required. It is also recommended that a new password be created whenever there is a change in committee officers or contact people.

You may also change a password by clicking on the "Forgot your password?" link on the IDIS login page. Then, after entering the committee's user name, an e-mail with a temporary link to a password reset page will be sent to the primary e-mail address on file for the committee. As long as your committee's contact information is up to date, this should allow access to the IDIS system outside of regular business hours when Board staff may be unavailable to help.

CAN ALL DISCLOSURE REPORTS BE FILED ELECTRONICALLY?

Most reports, including amendments, can be filed electronically, but there are exceptions. A D-1 Statement of Organization cannot be filed electronically. Additionally, although a Schedule A-1 may be filed electronically, an A-1 report cannot be changed once filed. If a committee needs to amend information from a Schedule A-1 filing it should contact Board staff for assistance.

HOW CAN I BE SURE THE BOARD HAS RECEIVED MY FILING?

When filing electronically, you will see a filing message informing you if the upload succeeded or failed. If the last message you see is 'Report SUCCESSFULLY filed', your report has been filed. You can then print a filing receipt from your account, if desired. You may also check the Board's website to confirm that a report filing was successful.

If the report filing fails, IDIS will give you a message explaining why it failed. If you are unable to determine the meaning of the message, please contact the Board for assistance.

Also, please remember that although entering information into the IDIS system may cause a report to be created, no information is actually transmitted to the Board until the report is filed.

SHOULD A PAPER COPY BE FILED TOO?

If you file a report with the State Board of Elections electronically, do not also send a paper copy.

HOW CAN I VIEW ELECTRONICALLY FILED REPORTS ON THE INTERNET?

Reports filed electronically may be viewed on the Board website at www.elections.il.gov. Report information may also be printed or downloaded into a database from the website.

CAN IDIS BE USED TO CREATE MAILING LABELS?

Although IDIS is designed to be a record keeping and reporting system and not a campaign management system, it does provide the capability to create mailing labels.

WHERE DO I GET IDIS HELP?

The Board's Campaign Disclosure staff is able to provide instruction in using IDIS, and our IT staff can provide technical support. The system itself has a useful HELP feature that may be accessed from any window.

IDIS training may be arranged by calling either the Springfield or Chicago office. However, we recommend not waiting until the last few days of a filing period to learn how to use the system or file reports – staff availability may be limited at that time.

If you have an electronic filing problem that results in a missed reporting deadline, it is important to contact Board staff for assistance as soon as possible. In order for that problem to be considered as a basis for a possible appeal of a late filing penalty, contact with the Board must be made and confirmed in writing by Board staff within 3 days of the filing deadline.

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For more information, visit the Board website at www.elections.il.gov, or contact Board staff:

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or

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