



NET FILE

## California Electronic Filing Instructions

### **1. Obtain Electronic User name and Password from the California Secretary of State.**

Before you may electronically file, you must request FOR EACH OF YOUR COMMITTEES an electronic filing user name and password. The user name and password from the Secretary of State is not the same as your user name and password for use with your Netfile accounts. To obtain a user name and password for your committee, you must get a copy of the "Application to Obtain Logon Passwords and Authorization of Vendor or Service Provider Form" which is attached at the end of this document. You must print this authorization form onto your committee's letterhead, and the form must be signed by the treasurer of the committee (the candidate may sign for a controlled committee). The form must then be sent by mail, courier, fax (916-653-5045), or hand-delivered to:

*Secretary of State Political Reform Division  
1500 11th Street, Room 495  
Sacramento, CA 95814  
ATTN: Electronic Filing*

Please make sure to include your telephone or fax number, so Secretary of State can get your user name and password to you as soon as possible. Once you have your user name and password, put them in a safe place. Any unauthorized user who gains access to that password will be able to file disclosure statements on the behalf of your committee, so be careful with it! We recommend applying for your user name and password IMMEDIATELY to avoid the last minute rush.

### **2 .Generate your Disclosure statement in Netfile .**

Generate your statements using NetFile as you would normally. In order for NetFile to be able to submit your filing electronically, you must make sure to print a "Complete Report" from our system. Check the "Do you intend to efile this document?" check box, and provide the verification information (the signature information normally hand-written on the cover page) for the statement. If your statement meets these two conditions, the document will have the yellow lightning bolt for efilng and be available to submit electronically.

### **3. Transmit your Disclosure statement from Netfile to the California Secretary of State.**

Once you have generated the form you want to electronically transmit to Secretary of State, the NetFile account "owner" (the one NetFile user who is considered most responsible for the

account) must log into our system, and find the document to be electronically filed in your Document Index.

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cont.

If the document was generated with both requirements met as described in Step #2 above, then a little yellow "lightning bolt" icon will appear next to the "E-Mail" icon. Click on the lightning bolt icon, and you will start the electronic filing process. First, you will be asked which electronic filing agency will receive your document. Choose the California Secretary of State. Then, you will be given the opportunity to review the document you are about to electronically file (including who generated the document and when), and you will be prompted for your electronic filing user name and password given to you from Step #1 above. Also, you will be asked to provide a fax number (including area code) which will be used by the Secretary of State's system to send a confirmation for your filing. After this information is provided, press the "Submit" button, and the filing process will begin. Our system will display a web page confirming the process has been initiated.

### **4. Confirm acceptance of efilng.**

If you entered a valid fax number in Step #3 above, you will receive a confirmation fax from the Secretary of State's system indicating the success or failure of your filing. The fax will include a filing ID number assigned to your statement by the Secretary of State's system. This ID number will look something like "CA-123456". To verify your submission from within NetFile, go to our document index and look for a document titled "Electronic Filing Transcript : CA-XXXXXX" (CA-XXXXXX stands for the filing number assigned to your statement by the Secretary of State's system). Open the file just like any other document from your document index, and view it using your favorite text editor, like Windows' Notepad. In the document, it will show all of the communication between NetFile's servers and Secretary of State. At the end of the document, you will be able to see if the document was accepted by Secretary of State, or why it failed if it did not go through.

### **5. Viewing of your filing on the California Secretary of States web site.**

After your statement has been accepted by Secretary of State, you may view the state's rendering of your electronically filed document at <http://cal-access.ss.ca.gov/>. Type in your Committee's ID number or name in the search box provided. Under "View Information" choose "Electronic Filings". Click on your filing to view.

### **Questions?**

If you have any questions about this information, please contact Netfile at [support@netfile.com](mailto:support@netfile.com) or 209-742-4100.

**CAMPAIGN - APPLICATION TO OBTAIN LOGON PASSWORD  
AND  
AUTHORIZATION OF VENDOR OR SERVICE PROVIDER**

I, the undersigned, am on record with the Secretary of State as:

*(check one)*

- Treasurer       Assistant Treasurer       Candidate       Controlling Officeholder  
 State Measure Proponent       Individual Donor       Responsible Officer

\_\_\_\_\_ (print full name of committee\*)      \_\_\_\_\_ (committee ID# if known)

\_\_\_\_\_ (Address)      \_\_\_\_\_ (City)      \_\_\_\_\_ (State)      \_\_\_\_\_ (Zip)

and am entitled to file campaign disclosure reports on behalf of the above committee. In order to file my required statements electronically, I hereby apply for issuance of an electronic filing password and user identification number.

Furthermore, I intend for my vendor or service provider to submit my reports electronically on my behalf. I hereby authorize

\_\_\_\_\_ (insert full name of vendor/provider)      (Not applicable for issue advocacy filers. Please use specific form available on this web site.)

to obtain my electronic filing password and identification number in order to timely file my campaign statements.

Subscribed and sworn on \_\_\_\_\_ (date)

\_\_\_\_\_ (signature)

\_\_\_\_\_ (print name of signer)      \_\_\_\_\_ (phone number)      \_\_\_\_\_ (fax number)

\* This form may also be used by major donors. Insert the name of the major donor in the committee name section, and leave the identification number field blank. The Secretary of State will assign a number to you for your use in filing electronically.

This form must be submitted on committee letterhead and signed by the candidate or filer currently on record with the Secretary of State. **Please be sure to include a fax number where we may direct our response.**

**PLEASE FAX THIS APPLICATION to (916) 653-5045**