

Help Content: Affiliations

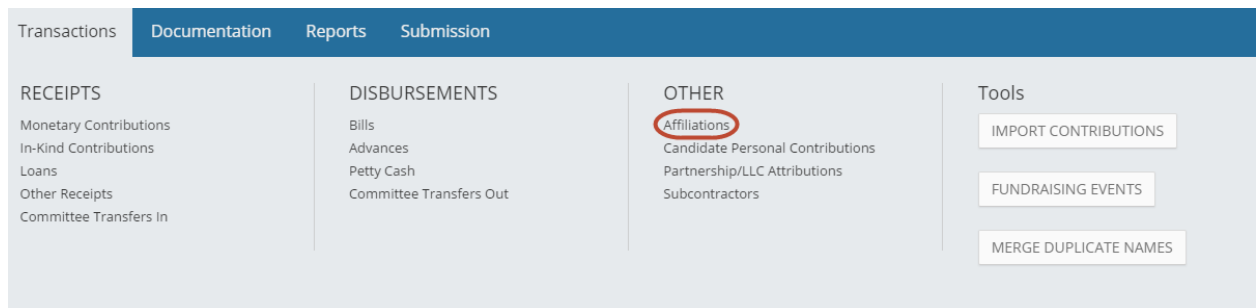
HOW TO ADD AN AFFILIATED GROUP

CANDIDATE SERVICES TIP(S):

- ✓ You must disclose affiliations between individuals and entities if the individual either owns or has significant decision-making control over the entity and if both the individual and the entity contribute to your campaign. In that case, their contributions would be aggregated and subject to a single contribution limit.
- ✓ In order to disclose affiliated contributions, you must first enter the individual contribution(s) made by the affiliated contributor(s). After you've added the affiliated group by following these steps, you can add members to the group. See [How to Add a Member to an Affiliated Group](#) for instructions.
- ✓ Create affiliated groups in C-SMART when applicable to ensure that contributions from individuals and their affiliated groups are aggregated. This will help you avoid compliance issues due to over-the-limit contributions from individuals and their affiliated groups.

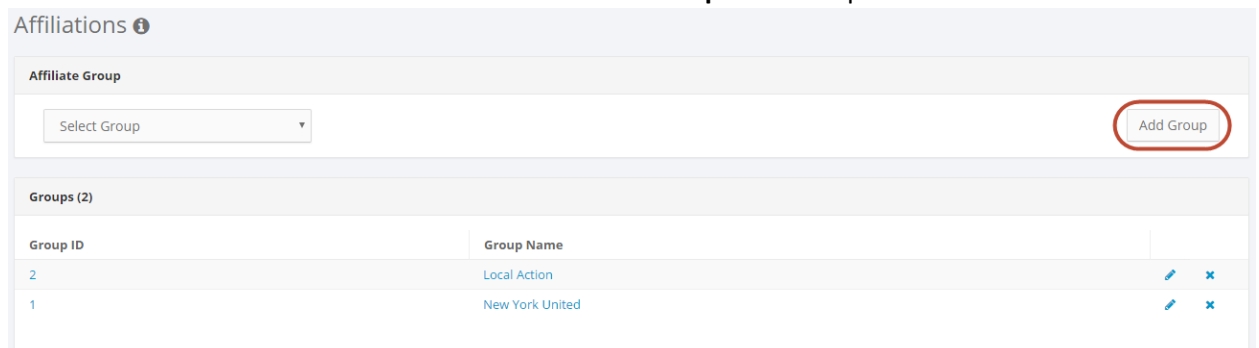
1. Go to Affiliations.

Click **Transactions** and then **Affiliations**.



2. Click Add Group.

You are now on the **Affiliations** screen. Click the **Add Group** button to proceed.



3. Enter the details of the affiliated group and click Add.

C-SMART will alert you if you leave out required information. Complete the fields as follows:

- **Group ID:** Enter a numeric identifier for this group.
- **Group Name:** Enter the name of the affiliated group.

- **Notes:** Enter any additional notes related to this affiliated group.
Please be aware that information entered and saved in this field is intended for use by the campaign only and is not part of any data submitted to the Campaign Finance Board during any submission process.

Add Affiliated Group ✕

Group ID:

3

Group Name:

NYS PAC

Notes:



4. The affiliated group has been successfully added.

At this point, C-SMART will go to the affiliated group's **Affiliations** page. This page will include all group members and the aggregate contributions from them.

✔ Your transaction has been successfully saved. ✕

Affiliations ?

Affiliate Group

NYS PAC Add Group

Group Details Edit Delete

Group ID: 3
Group Name: NYS PAC
Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount |
|------------|----------------|---------------------|
| No records | | |
| | | Total: \$0.00 |

HOW TO EDIT AN AFFILIATED GROUP

1. Click the Group Name.

From the **Affiliations** screen, click on the name of the group that you wish to modify. Or, click on the pencil icon corresponding to the group you wish to modify. If you choose the second option, skip Step 2 below.

Affiliations ⓘ

Affiliate Group

Select Group Add Group

Groups (3)

| Group ID | Group Name | |
|----------|-----------------|-------------------------------------|
| 2 | Local Action | ✎ ✕ |
| 1 | New York United | ✎ ✕ |
| 3 | NYS PAC | ✎ ✕ |

2. Click Edit.

Once you are on the page for the affiliated group you wish to modify, click **Edit**.

Affiliations ⓘ

Affiliate Group

NYS PAC Add Group

Group Details [✎ Edit](#) [✕ Delete](#)

Group ID: 3
 Group Name: NYS PAC
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount |
|------------|----------------|---------------------|
| No records | | |
| | | Total: \$0.00 |

3. Update and click Save.

Modify, add, or remove the applicable fields and then click **Save**.

CANDIDATE SERVICES TIP(S):

- ✓ Notice that you will be able to edit only the Group Name and Notes fields.

Edit Affiliated Group
✕

Group ID:

Group Name:

Notes:

4. The group has been successfully edited.

HOW TO DELETE AN AFFILIATED GROUP

1. Click the Group Name.

From the **Affiliations** screen, click on the name of the group that you wish to delete. Or, click on the X icon corresponding to the group you wish to delete. If you choose the second option, skip Step 2 below.

Affiliations ⓘ

Affiliate Group

Select Group ▼
Add Group

Groups (3)

| Group ID | Group Name | | |
|----------|-----------------|-------------------|-------------------|
| 2 | Local Action | ✎ | ✕ |
| 1 | New York United | ✎ | ✕ |
| 3 | NYS PAC 2017 | ✎ | ✕ |

2. Click Delete.

Once you are on the page for the affiliated group you wish to delete, click **Delete**.

Affiliations ⓘ

Affiliate Group

NYS PAC 2017 Add Group

Group Details Edit Delete

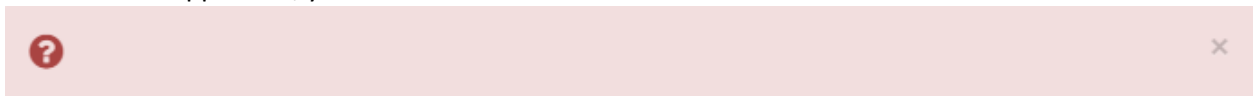
Group ID: 3
 Group Name: NYS PAC 2017
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount |
|------------|----------------|---------------------|
| No records | | |
| | | Total: \$0.00 |

3. Click Yes.

Once you have reviewed the group and are positive that this was entered in error and does not exist or is not applicable, you can click the **Yes** button.



Are you sure you want to delete this group?

Cancel **Yes**

4. The group has been successfully deleted.

CANDIDATE SERVICES TIP(S):

- ✓ In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.

HOW TO ADD A MEMBER TO AN AFFILIATED GROUP

CANDIDATE SERVICES TIP(S):

- ✓ In order to disclose affiliated contributions, you must first enter the individual contributions made by the affiliated contributors. After you've added the affiliated group by following the preceding steps, you can add members to the group by following the steps below.
- ✓ Creating affiliated groups when applicable helps to ensure that contributions from individuals and their affiliated groups are aggregated in C-SMART. This will help you to

avoid compliance issues due to over-the-limit contributions from individuals and their affiliated groups.

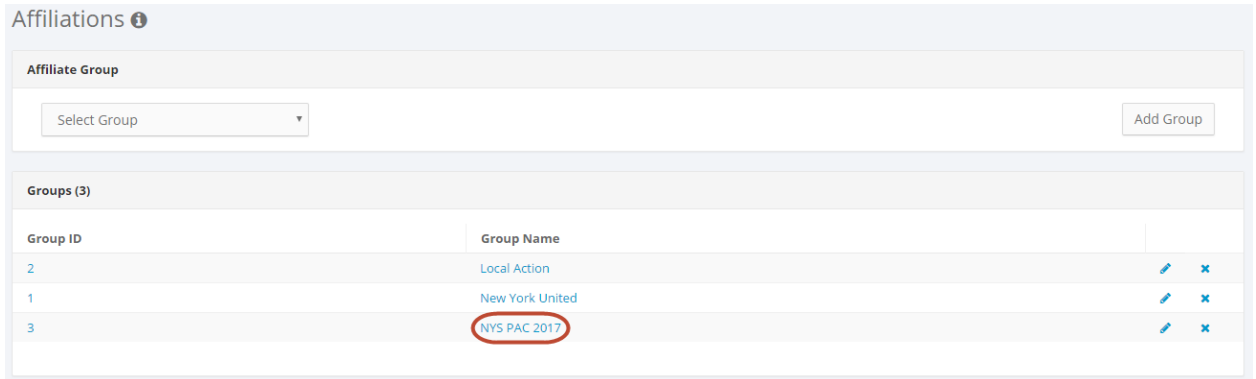
1. Go to Affiliations.

Click **Transactions** and then **Affiliations**.



2. Click the Group Name.

Click on the name of the group to which you wish to add a member.



3. Click Add Member.

Once you are on the **Affiliations** page of the group to which you wish to add a member, click **Add Member**.

Affiliations ⓘ

Affiliate Group

NYS PAC 2017 Add Group

Group Details Edit Delete

Group ID: 3
 Group Name: NYS PAC 2017
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount |
|------------|----------------|---------------------|
| No records | | |
| | | Total: \$0.00 |

4. Enter the details of the group member and click Add.

C-SMART will alert you if you leave out required information. Complete the fields as follows:

- **Name:** From the drop-down menu, select the name of the member. The person must already be entered in your Names database in C-SMART for you to be able to add him or her as a member of the group. If the name is not included in the drop-down list, go to the [Add Name](#) instructions.
- **How Affiliated:** If you would like to record the relationship between the affiliated member and the group, you may enter that information in this field.

Add Member ×

Name:

How Affiliated:

Add

5. The individual has been successfully added to the group.

At this point, C-SMART will go back to the group’s **Affiliations** page. The **Group Members** section at the bottom will be updated to include the member you just added, including the total amount he or she has contributed.

✔ Your transaction has been successfully saved. ✕

Affiliations ⓘ

Affiliate Group

NYS PAC 2017 Add Group

Group Details Edit Delete

Group ID: 3
 Group Name: NYS PAC 2017
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount | |
|---------------|----------------|------------------------|-----|
| Minuit, Peter | Chair | \$508.71 | ✎ ✕ |
| | | Total: \$508.71 | |

HOW TO EDIT AN AFFILIATED GROUP MEMBER

1. Click the Pencil Icon.

From the group’s **Affiliations** page, click on the pencil icon corresponding to the individual member you wish to modify.

Affiliations ⓘ

Affiliate Group

NYS PAC 2017 Add Group

Group Details Edit Delete

Group ID: 3
 Group Name: NYS PAC 2017
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount | |
|---------------|----------------|------------------------|-----|
| Minuit, Peter | Chair | \$508.71 | ✎ ✕ |
| | | Total: \$508.71 | |

2. Update and click Save Member.

Modify, add, or remove the applicable fields and then click **Save Member**.

CANDIDATE SERVICES TIP(S):

- ✓ Notice that you will be able to edit only the How Affiliated field. If you are attempting to select a different individual as the group member, delete the member you have entered and add a new one.

✕

Name:

How Affiliated:

Save Member
Cancel

3. The group member has been successfully edited.

HOW TO DELETE AN AFFILIATED GROUP MEMBER

1. Click the X Icon.

From the group’s **Affiliations** page, click on the X icon corresponding to the group member you wish to delete.

Affiliations ⓘ

Affiliate Group

Add Group

Group Details [Edit](#) [Delete](#)

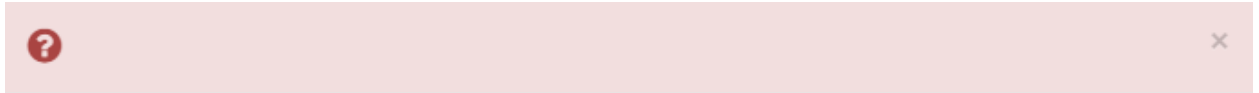
Group ID: 3
 Group Name: NYS PAC 2017
 Notes:

Group Members Add Member

| Name | How Affiliated | Contribution Amount | |
|------------------------|--------------------------|---------------------|-------------------|
| Minit, Peter | Chairperson of the Board | \$508.71 | ✕ |
| Total: \$508.71 | | | |

2. Click Yes.

Once you have reviewed the group member and are positive that the individual was added in error and is not applicable to the group, you can click the **Yes** button.



Are you sure you want to delete this member from the group?



3. The group member has been successfully deleted.

CANDIDATE SERVICES TIP(S):

- ✓ *In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.*