A Few Frequently Asked Questions about TRACER

System Background

Q: What is TRACER?

A: TRACER is the Colorado Secretary of State's online campaign finance filing system. It was launched on January 4, 2010. TRACER contains campaign finance data for all state and county candidates, committees, and political parties in Colorado dating back to 2002. It is the system by which candidates, committees, and political parties enter their reports of contributions and expenditures, and it contains a wealth of information related to campaign finance law in Colorado. TRACER can be accessed at http://tracer.sos.state.co.us.

Q: What does "TRACER" stand for?

A: Transparency in Contribution and Expenditure Reporting.

Q: What happened to data contained in the previous system?

A: All data entered into the campaign finance system prior to rollout of TRACER has been migrated into the new system.

Q: Is there training for TRACER?

A: TRACER contains training modules within the system. There are also webinars available on the Secretary of State's website. These can be accessed by clicking on the Web Training link under the resources heading. On each page of every section in the system, there is also a link near the top left hand side of the page called Help with this page. Clicking on this link will give you detailed instructions and a description of the options available to you on that page.

County Users

Q: I am a candidate for county office and I'm used to filing my paper reports with the County Clerk. Why do I need to file online with the Secretary of State?

A: Following the passage of HB09-1357, the legislature mandated that county candidates file directly on the state's online system, saving data entry time for the County Clerk's offices and improving search capability for the public. Although paper contribution and expenditure reports will no longer be accepted, we've created numerous options for county candidates to file their reports, including a downloadable spreadsheet and online reporting accessible from any computer. Note: This also applies to candidates and committees in Special District elections.

Using the System

Q: How do I access my campaign finance account?

A: If you had an account in the older, legacy system, you will need new login information for TRACER. Your old username and password will not work in TRACER. If you had an account in the older system, and did not receive a pair of emails from the Secretary of State's office on January 3, 2010, please call us at (303) 894-2200 ext. 6383 or email cpfhelp@sos.state.co.us to get access. If you are a new user of the Colorado campaign finance system, you may simply go to tracer.sos.colorado.gov to get started.

Q: How do I register a committee?

A: From the TRACER home page, click on the Committee Registration button, the Registration tab or the Committee Registration link on the left hand side of the home page. Follow the on-screen steps to enter information about the type of committee you are registering, (definitions of the various types of committees can be found by clicking the Help with this page link) the contact information for the committee, financial institution information and the registered agent for the committee. Note: legally the registered agent is the only individual authorized to submit reports on behalf of the committee. When you are finished, click Save. The information will be submitted to the Secretary of State's Office for review and upon approval, the registered agent will receive a username and PIN to access the system and can begin entering contributions and expenditures.

Q: How can I avoid getting locked out of the system?

A: The TRACER system is set up to give you three opportunities to enter your username and password (PIN) to login to your account. If, on the third attempt you either enter an incorrect username or PIN, the system will lock you out and you will need to contact a member of the Campaign Finance Support Team to unlock the account. TIP: If you have entered an incorrect password two times, click on the Forgot your PIN? link before you become locked out of the system. When you click on this link you will be asked to provide the answer to the security question that was set up when you created your permanent password. If you successfully provide the answer to the security question, the system will display your password on the screen. If you continue to have trouble with your username and/or password, please contact the support team.

Q: What is the difference between the tabs across the top of the TRACER page and the links on the left hand side of the page?

A: Once you have logged into the system, the tabs across the top of the page will guide you to the various sections of TRACER necessary to enter contributions, expenditures and to file your report. You will primarily be using the tabs at the top of the page when you are working in your committee workspace and entering information specific to your committee. The links on the left had side are "public" links and allow you to search for other candidates, committees, contributions and expenditures outside of your own workspace and to run reports on various information contained in the system.

Q: How do I enter contributions and expenditures in TRACER?

A: Contributions and Expenditures can be entered into the system by clicking on the corresponding tabs at the top of the page once you have logged into the system. To enter a new contribution or expenditure, click on the Add button under the Contribution/Expenditure History heading. Enter the appropriate information for that contribution or expenditure and once completed, click the Save button. You will receive confirmation if the entry has been successfully saved into the system or you will be prompted to fill in any missing information in required fields. The system will also notify you if a particular contribution may appear to be prohibited under current campaign finance laws and rules.

Q: What are the 10 Most Recent Contributions/Expenditures?

A: These are the most recent contributions and expenditures that have been successfully entered into the system by the user. These are not pending and there is no need to re-file or delete these contributions and expenditures as this grid display is simply a reminder as to where the user left off the last time they were logged into the system.

Q: How can I change or edit a contribution or expenditure that I have already entered into TRACER?

A: From the Contribution or Expenditure entry page, you will need to click on the Find button which is listed under the Contribution or Expenditure History section. Enter the appropriate criteria in the search fields to find the contribution or expenditure you wish to update and click the Find Contribution/Expenditure button. You will then be given the option to Update, Delete or Return that specific Contribution or Expenditure.

Q: What does NSF mean in the Find Contribution results grid?

A: When you search for a contribution, one of the options available to you is NSF. Click on this option to record a contribution that was returned by the bank because of insufficient funds in the drawer's account.

Q: How does filing a report work in the TRACER system?

A: The TRACER system is set up to allow users to enter and save contribution and expenditure information throughout the reporting period. These contributions and expenditures are stored in a "bucket" until it is time to file a report. When a report is due, the system will automatically locate and populate the report with all contributions and expenditures that have been entered containing dates falling within that specific reporting period. Previously, users would enter their contributions and expenditures directly into the report and then file. In TRACER, if all of your contributions and expenditures for a reporting period have been entered into the system, the report will already contain those entries and all you need to do is file the report. For more detail information on how to file a report in TRACER, please refer to the Colorado Campaign and Political Finance (CPF) Manual.

Q: How do I know if my report has been successfully filed?

A: When you submit your report, the system will generate a confirmation message on the screen confirming that you have successfully filed your report. At this point, the system will also give you the option to print a copy of the filed report for your records, or to export the report in a format of your choice. Additionally, if you click on the Filings tab at the top of the page, you will see the reports that have been successfully filed and received by the system under the Filing History section. A status of "Filed" means that the report was successfully submitted and in the Filed column, the system will show you the date on which a given report was filed.

Q: How do I file an electioneering or independent expenditure report?

A: If you are working on behalf of a committee, you will have the option to mark a contribution as an Electioneering Communication or an expenditure as either made for Electioneering Communication or and Independent Expenditure. For more information on when to file Electioneering Communications reports or Independent Expenditures and what types of contributions and expenditures fall into these categories, please consult the Colorado Campaign and Political Finance (CPF) Manual or click on the links in the Contribution and Expenditure entry section for more detailed information. If you are not affiliated with a candidate or committee and wish to file one of these reports, the appropriate forms can be downloaded under the Resources/Forms section of the TRACER system. Again, please consult the CPF Manual for instructions on when to report these types of contributions and expenditures.

Q: What is EDI?

A: EDI (Electronic Data Interface) is a method of electronic filing which allows submission of bulk report data using a predesigned template, thus avoiding online entry of information contained in the report. This method of contribution and expenditure entry may be particularly useful for committees with a large volume of activity to report. EDI is completed using either an Excel or an XML template. These templates can be found at:

http://www.elections.colorado.gov/Default.aspx?PageMenuID=1256

In order to ensure that the templates have been filled out properly and that the system will accept the data, we ask that new EDI filers submit a test file at least **two weeks** before the filing date for which the committee is trying to upload information.

Q: How can I grant permission to a third party vendor or another person to enter contributions and expenditures on behalf of my committee?

A: If you wish to grant access to a vendor, you must fill out the form located at

http://www.elections.colorado.gov/Content/Documents/Campaign%20Finance/Reporting%20Forms/2010/username_PIN_permissions.pdf

Access will be granted once the form has been received and approved by this office. Note: the registered agent and/or the candidate for the committee is still responsible for filing the actual report once all contributions and expenditures for the reporting period have been entered into the system by the vendor. Vendors or other third parties are not permitted to file reports on behalf of the committees they are working for.

Q: What does "terminated" mean next to a candidate or committee status?

A: A status of terminated means that a candidate is no longer actively seeking that specific office. This usually occurs at the end of the associated election cycle for the office in which a candidate has submitted an affidavit. In the case of a committee, this means the committee has achieved a "zero" fund balance; there are no longer any remaining funds on hand, and they have chosen to close the committee through the filing of a termination report. For information on how to close out and terminate a committee, please refer to the Colorado Campaign and Political Finance Manual.

Q: If I search for a candidate, why are they listed as being active several times, even in the case of previous elections?

A: Candidates are assigned a unique identification number. This number remains the same for that candidate even if they run for different offices in subsequent elections. A status of "active" means that a particular candidate is currently seeking an elected office and because that candidate is currently active, the system will also show an active status next to their name for any previous election cycles they may have participated in.

Q: I have more questions. Who can I contact?

A: We have a Campaign Finance Support Team to answer any other questions you may have. Please call us at (303) 894-2200 ext. 6383, or email cpfhelp@sos.state.co.us.