REGISTERING A CANDIDATE COMMITTEE **IN THE CFB PORTAL**

WHAT IS THE CFB PORTAL?

The CFB Portal ("Portal") is the platform you will use to register your candidate committee with the New York City Campaign Finance Board (CFB), view important messages from the CFB, and access C-SMART and the Voter Guide Submission Application (VGSA).

To access the Portal, you must first create an account. Once you create your account, you can manage your registration(s) and take other important actions to update the CFB about your committee(s). You only need one Portal account, even if you have run in multiple election cycles or are working on more than one campaign.

Your Portal account is where you will find all your information associated with the CFB. One of the main benefits of the Portal is that you can view all your committee registrations in one place. If you are a candidate who has run in multiple election cycles, you will see all your registrations (and notices from the CFB!) in your Portal account. If you are a campaign staff member working with various campaigns, you can view all your affiliated campaigns in your Portal account as well.
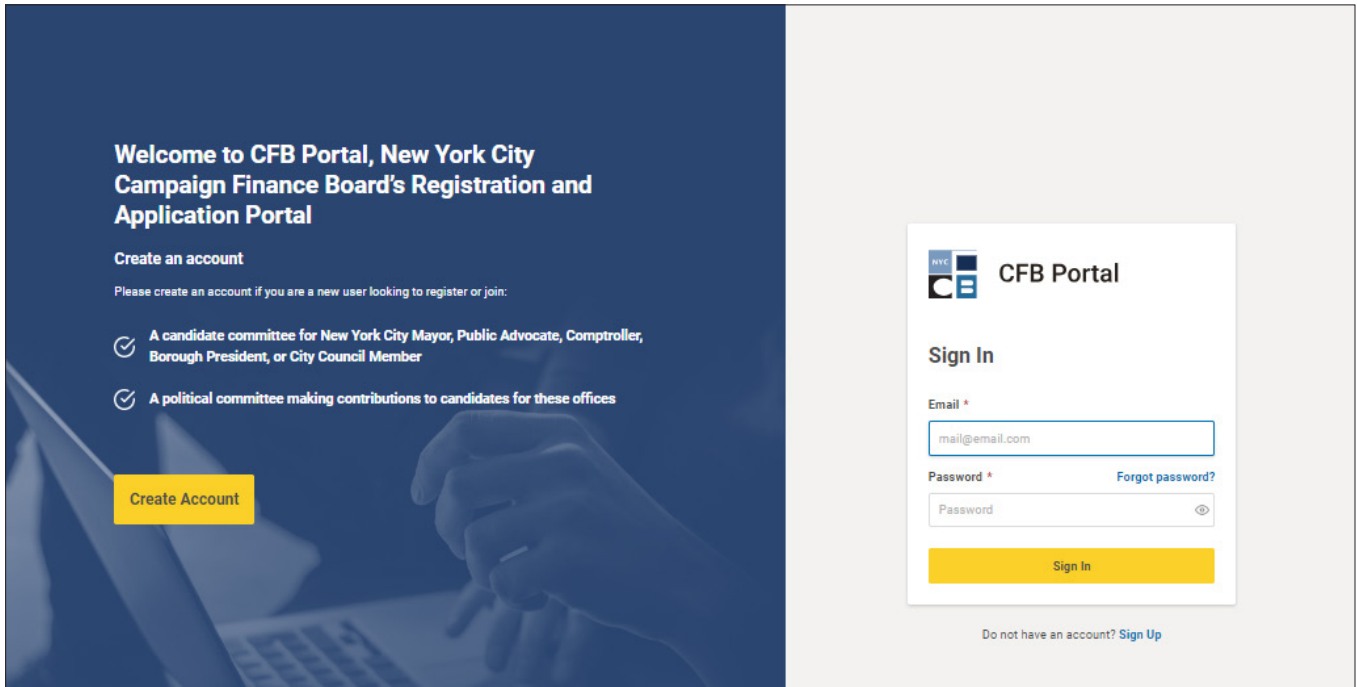
CREATING A PORTAL ACCOUNT

You must have a Portal account to register a candidate committee with the CFB. Regardless of the number of candidate committees you are affiliated with, you only need to create one Portal account.

For each campaign, both the candidate and treasurer must have their own unique Portal account (unless the candidate will serve as their own treasurer, which is not recommended).

Note: Either the candidate or treasurer can add a new registration and then invite the other to review and submit the registration. Do not create separate campaign registrations for one candidate.

To create your account, go to https://portal.nyccfb.info/ and click on the **Create Account** button or the **Sign Up** link next to **Do not have an account**?

Note: You may see the entire screen as shown below or only the right panel with the Sign In screen, depending on your computer's display settings.
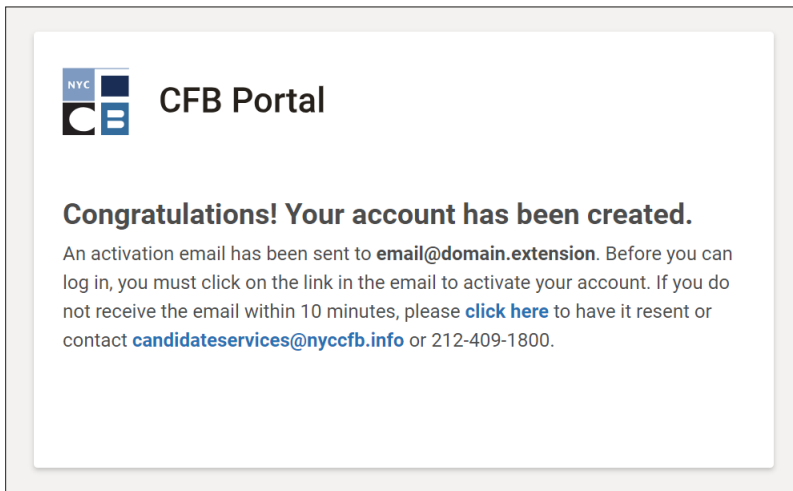

Enter each of the required fields and click **Submit**.

Best Practice: Create your account with an email address you check regularly and frequently. You will receive notifications from the Portal at this email address. You will need access to this email address if you ever need to reset your password. You can change this email later if needed.
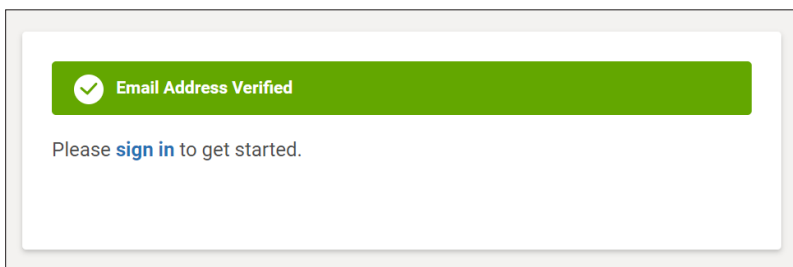
Note: If you run again in future election cycles, you will be required to use the email address that was used to create your Portal account.

When you create your Portal account, this will display on screen:

CFB Portal

Congratulations! Your account has been created.

An activation email has been sent to **email@domain.extension**. Before you can log in, you must click on the link in the email to activate your account. If you do not receive the email within 10 minutes, please **click here** to have it resent or contact **candidateservices@nyccfb.info** or 212-409-1800.
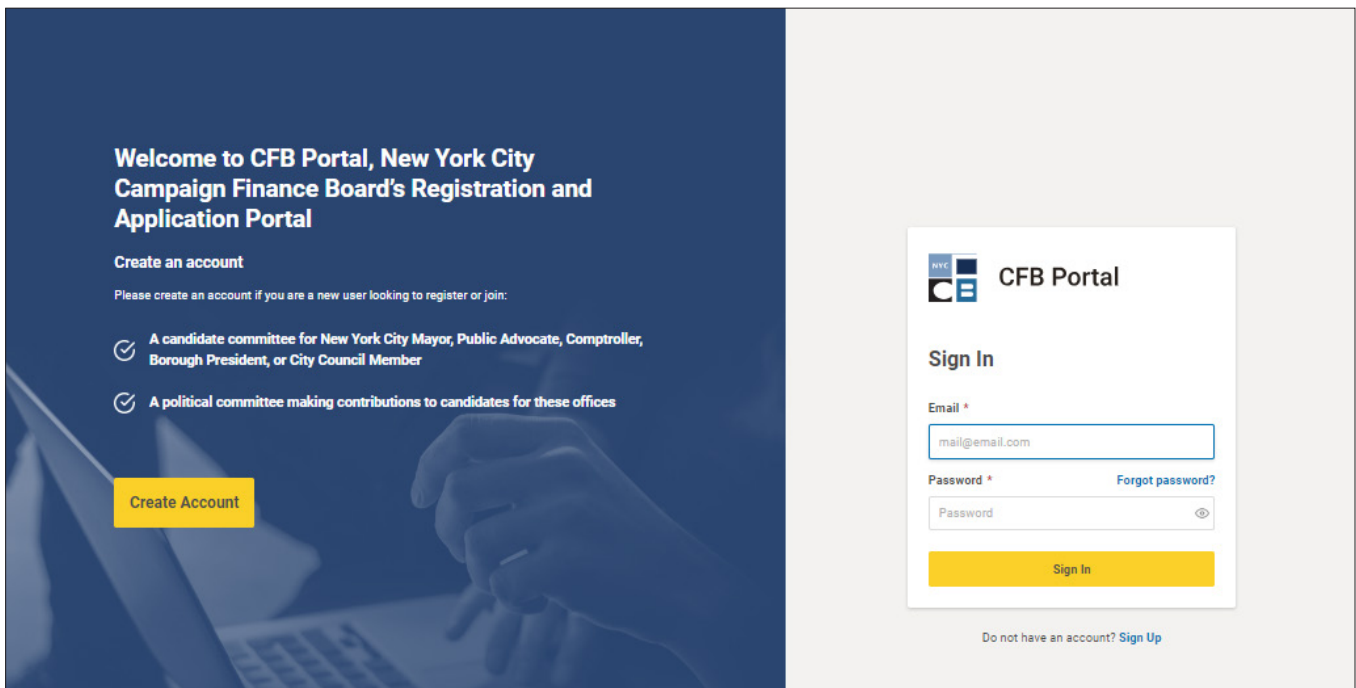
You will receive an email from DoNotReply@nyccfb.info with the subject line *Email Verification* which will prompt you to activate your Portal account. If you do not see it immediately, wait a couple of minutes and check your Spam folder. If you see the message in your Spam folder, make sure to whitelist "DoNotReply@nyccfb.info" since all automated notifications will be sent from this email.

Note: You will not be able to proceed with candidate registration until you activate your account.

Once you click on the link in your activation email you will be prompted to sign into your Portal account.

✔ **Email Address Verified**

Please **sign in** to get started.

Enter your email and password to log in.

Welcome to CFB Portal, New York City Campaign Finance Board's Registration and Application Portal

Create an account

Please create an account if you are a new user looking to register or join:

✓ A candidate committee for New York City Mayor, Public Advocate, Comptroller, Borough President, or City Council Member

✓ A political committee making contributions to candidates for these offices

Create Account

CFB Portal

Sign In

Email *

mail@email.com

Password *   Forgot password?

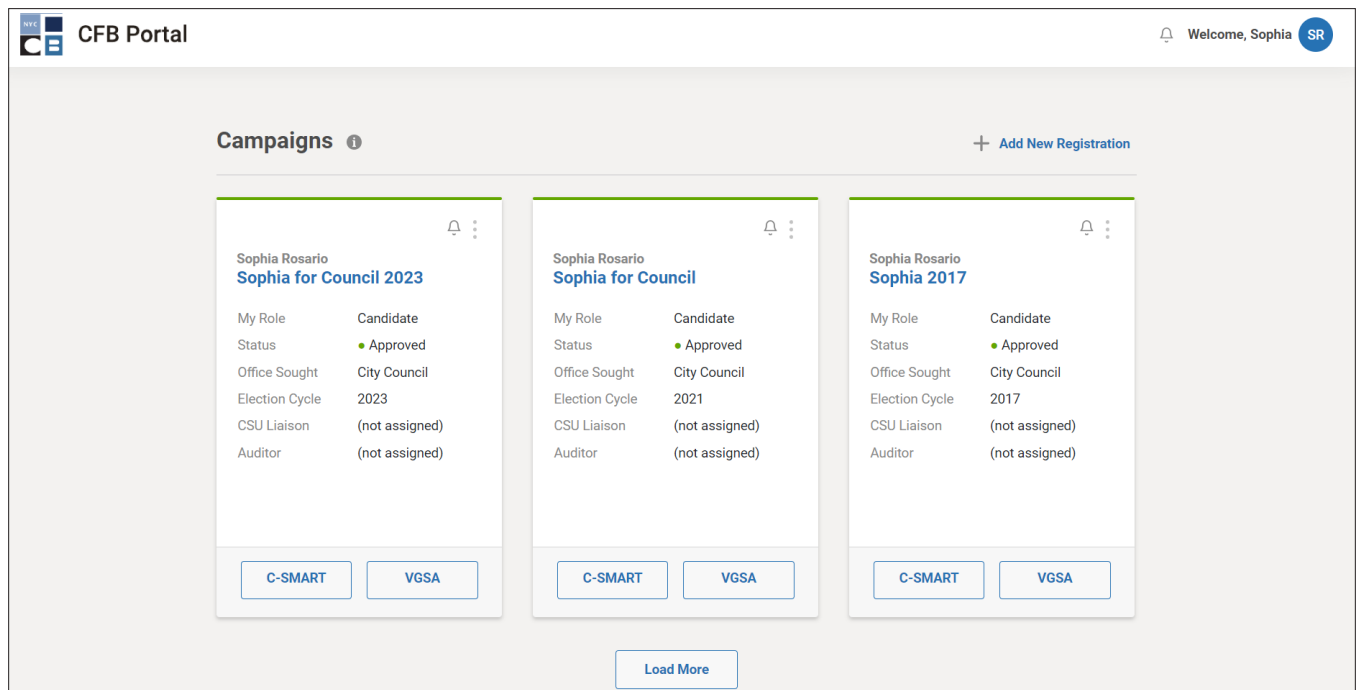Password

Sign In

Do not have an account? **Sign Up**

THE PORTAL DASHBOARD

Once you log into your Portal account, you will see the homepage, which we refer to as the **Portal dashboard** or **dashboard**. Here, you can edit an existing registration or submit a new registration, view important notices from the CFB in your **Message Center**, and access C-SMART and the VGSA.

In this section, we will provide information for campaigns that are already registered with the CFB. If you are not registered with the CFB, you will not be able to see these features and can skip to the next section, "Creating a New Committee Registration".

Note: If you have run in previous cycles, you can access the full view of all committee registrations by clicking on the **Load More** button under the first row of campaign cards.
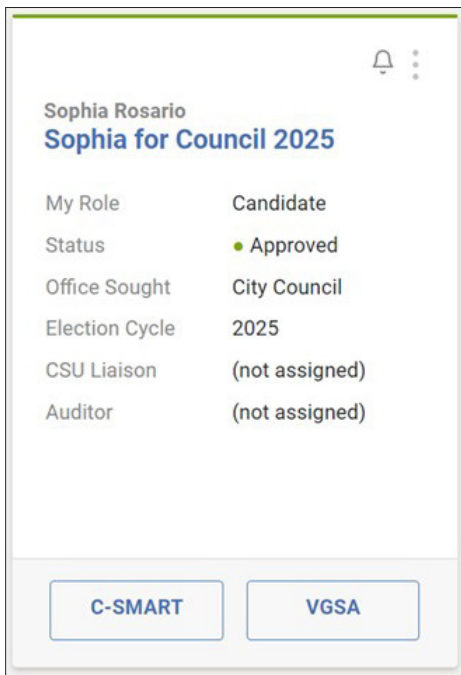

If you are the candidate, your **campaign card** will appear on your dashboard once you successfully register with the CFB. If you are a campaign staff member, you will see the campaign card(s) after the campaign invites you to link to the committee registration. See pages 15–16 for information on inviting campaign staff and linking to committee registrations.

The campaign card provides an overview of your committee's registration based on the information you submitted to the CFB. If any information on your campaign card is incorrect, contact your Candidate Services liaison.

In the top right-hand corner of your campaign card, you will see a **bell** icon and **three dots**. The bell icon will open the Message Center for this specific campaign. The three dots will take you to the campaign's **Training** page where you can review your training compliance status.

The candidate's name will always appear at the top of the campaign card followed by the committee's name. The details that appear on your campaign card are as follows:
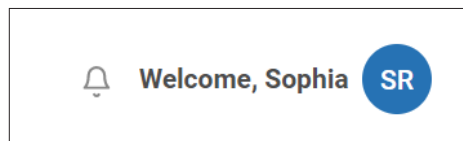
◆ **My Role:** This field lists your role on the campaign based on the information submitted to the CFB.

◆ **Status:** This field will change if you edit your registration. There are four different statuses:

  • **Approved:** The campaign card will be green. An approved registration indicates that the CFB has received, reviewed, and approved all the information on your registration. The information you see on your registration here matches the information on file with the CFB.

  • **Draft:** The campaign card will be yellow and there will be a yellow Complete Registration button. There are several reasons why your campaign card may display this status. If it is a new registration, you may not have completed the registration and may need to complete LexisNexis verification to submit the changes to the CFB. If you are already registered with the CFB, the Draft status indicates that you (or a campaign staff member) made updates to your registration that have not been submitted to the CFB.

  • **Submitted:** The campaign card will be blue. For new and existing registrations, this status indicates that your information has been submitted to the CFB and is awaiting review.

  • **Rejected:** The campaign card will be red and there will be a red Complete Registration button. A rejected status indicates that a new registration or update to an existing registration was rejected by the CFB. You will receive an email from your Candidate Services liaison explaining why your registration was rejected and how to rectify any issues.

◆ **Office Sought:** Displays the office for which the candidate is running (including borough or district, if appropriate).

◆ **Election Cycle:** Displays the election cycle for this registration. If you are the candidate, you cannot have multiple registrations for the same election cycle.

◆ **CSU Liaison & Auditor:** Once the CFB assigns your campaign a Candidate Services liaison and auditor, their names will appear here.
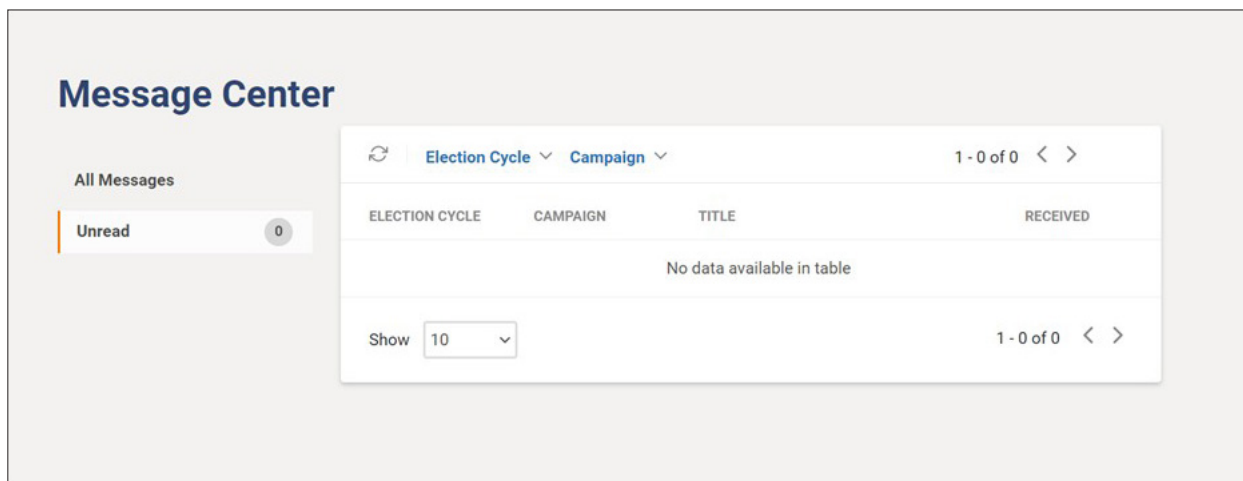
After your registration is approved by the CFB, the C-SMART and VGSA buttons will appear at the bottom of your campaign card. Access to C-SMART and the VGSA is not affected by changes to the status of your campaign card (even if the status of your campaign card changes to Draft, Submitted, or Rejected).

C-SMART is the CFB's web-based application that all campaigns use to record transactions, upload documentation, and submit disclosure statements to the CFB. The VGSA allows candidates to submit content for the New York City Voter Guide and Video Voter Guide. Your Candidate Services liaison will inform you about this the timeline of this process early in the election year.

Check your email and Message Center regularly since all official notifications and correspondence from the CFB will be posted to the Message Center. When a new message is posted to the Message Center, all campaign contacts on the committee registration will receive an email notification prompting them to log into the Portal and review the message. You can access the Message Center and view all your notices at any time by clicking the bell icon on the top right corner of your campaign card or the dashboard screen.
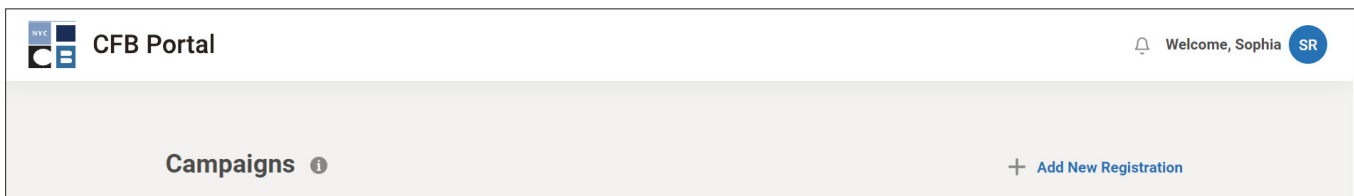
In your Message Center, you can filter between election cycles (if you have run in the past), unread messages, and your campaigns (if applicable).

CREATING A NEW CANDIDATE REGISTRATION

To create a candidate registration, navigate to the CFB Portal Dashboard and click **Add New Registration** on the right side of the screen.
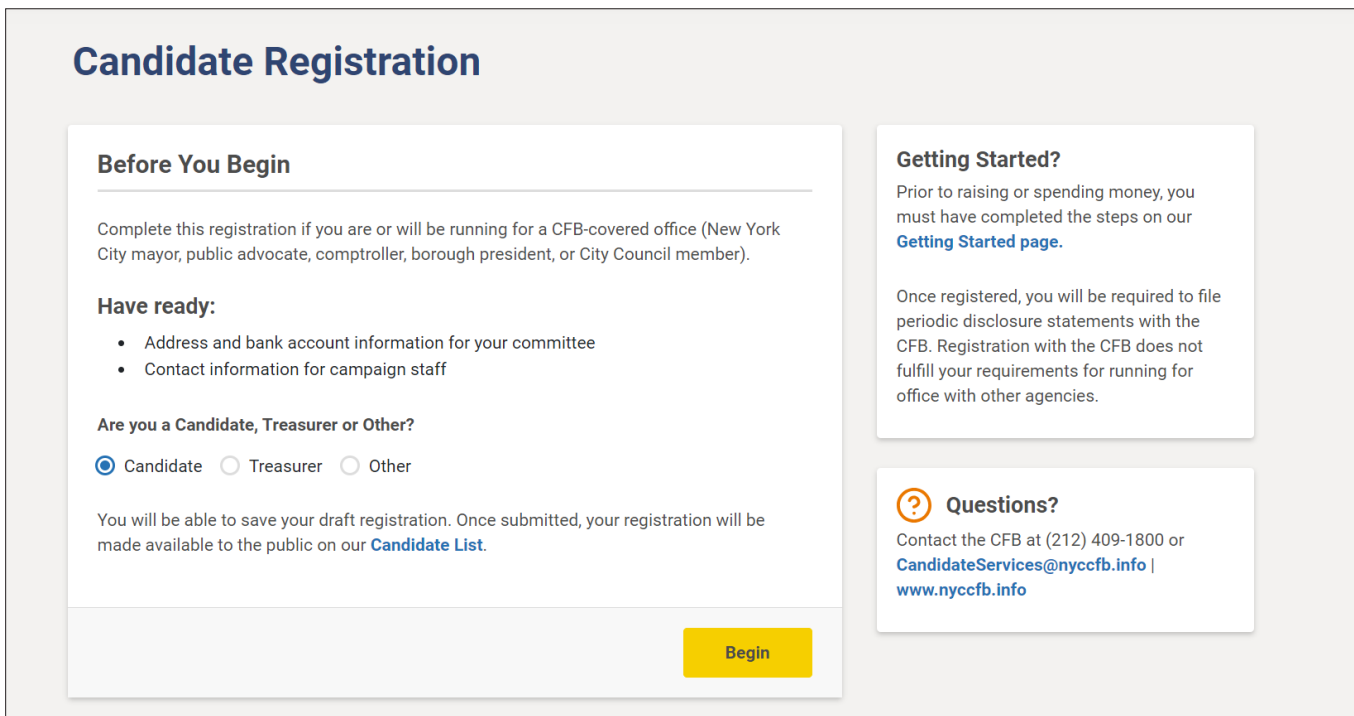

You will be brought to the Candidate Registration screen, where you will be prompted to begin the process of submitting a registration to the CFB.

Note: Before you start your registration, make sure you have your committee bank account information and contact information for campaign staff. If you are unable to open a bank account before you register, you will have to provide this information promptly after registering with the CFB.

All required fields are marked with a red asterisk.

Are you a Candidate, Treasurer, or Other? Select the option that describes your role on the campaign. If you are not the candidate or treasurer, you can fill out the registration but only the candidate and treasurer can complete the identity verification process to submit the registration to the CFB.

ELECTION CYCLE & OFFICE SOUGHT

Election Cycle: Select the election cycle you wish to run in.

Office Sought: You must declare the office you are running for in this section. If you select Borough President or City Council, you must enter the borough or district number.

Party Registration: This field is optional and is for CFB informational purposes only.

Throughout this entire registration, you will use the **Save & Continue** button to proceed to the next screen. Remember, if you change any information, make sure to click **Save & Continue** before navigating away from the page.

CANDIDATE

Have you previously been a candidate for any elective office or political party position? If you have previously run for elective office or a party position, you must disclose that by selecting **Yes**.

Candidate Information: Enter the candidate's information. Provide a phone number where the candidate can be easily reached by the CFB. The email address must be an address that the candidate currently has access to and will continue to have access to before, during, and after the election.

Candidate Employment: If you are employed, provide the employer's address and contact information. If self-employed, enter Self-Employed in the Employer Name field and your residential address for the City/Town/Village, State and ZIP Code fields.

PROGRAM PARTICIPATION

Indicate here whether you will join the Matching Funds Program. You can change your selection until the certification deadline or prior to receiving public funds, whichever is earlier.

Note: Small campaigns are not eligible for public funds and are not required to file disclosure statements, unless the campaign raises/spends over $1,000. If this occurs, contact your Candidate Services Liaison before the next disclosure statement to receive instructions on how to amend your registration.

Candidate Registration

Candidate

- ✓ Election Cycle & Office
- ✓ Candidate
- ● Program Participation
- ○ Treasurer
- ○ Committee
- ○ Additional Committee
- ○ Bank Account
- ○ Credit Card Contributions
- ○ Campaign Contacts
- ○ Review & Submit

Program Participation

Do you want to participate in the **Matching Funds Program?**

New York City's landmark Matching Funds Program provides public funds to candidates for city office in exchange for abiding by spending limits. Candidates who join the voluntary program and meet eligibility requirements may receive matching funds at an 8-to-1 rate for contributions from New York City residents.

Note: This choice is non-binding until the deadline to certify to receive public funds or prior to the receipt of public funds, whichever is earlier.

- ○ Yes
- ○ No
- ○ I do not plan to raise or spend more than $1,000 and wish to register as a small campaign.

← **Previous**   **Save & Continue**

TREASURER

If you do not yet have a treasurer, but plan on adding one to the registration later, select **the candidate is going to take the role of treasurer** option. Given the responsibilities and time commitment, we strongly discourage a candidate from being their own treasurer.

Similar to the candidate, provide contact information that is up-to-date and reliable. The email address must be an address that the treasurer currently has access to and will continue to have access to before, during, and after the election.

COMMITTEE

If you have run in a previous election(s), your committee name must be different and unique from your previous committee(s). You are not required to immediately disclose a website, nor any other social media pages to the CFB. We recommend disclosing your campaign sites once they are public.

Note: Information you input in the campaign's Portal registration, such as the committee's name; address; contact information; and the treasurer's name, employer and employer city, will be made available to the public through our Registered Political Committee webpage.

ADDITIONAL COMMITTEE

Disclose any active political committees from previous elections here (including any committees for office at the state, federal, and local level; as well as any CFB-covered offices). If the candidate has not run for office previously or does not have any active committees, you can skip this page.

BANK ACCOUNT

If you need help deciding which bank to choose for your committee, visit our Choosing a Bank webpage. If you cannot open a bank account until after you register with the CFB, you may skip this section. You must disclose your bank account within 15 business days or before your next disclosure statement filing, whichever is earlier. The campaign cannot access C-SMART until the committee bank account is disclosed to the CFB.

CREDIT CARD CONTRIBUTIONS

Campaigns must disclose any platforms they are using to receive contributions on their registration. While we recommend using Contribute, campaigns are permitted to use other platforms to collect credit card contributions, so long as they disclose this information in their registration.

Note: Please contact your assigned Candidate Services liaison prior to accepting contributions via a secondary platform at any point in the election cycle.

Candidate Registration

Candidate

- ✓ Election Cycle & Office
- ✓ Candidate
- ✓ Program Participation
- ✓ Treasurer
- ✓ Committee
- ✓ Additional Committee
- ✓ Bank Account
- ● Credit Card Contributions
- ✓ Campaign Contacts
- ✓ Review & Submit

Credit Card Contributions

Contribute is the CFB's online credit card contributions platform. Contribute is exclusively available to registered campaigns, and you can sign up as soon as your registration is submitted and approved. For more information, please refer to the **Contribute Frequently Asked Questions**.

The campaign plans to use Contribute exclusively.

- ● The campaign plans to use Contribute exclusively.
- ○ The campaign is accepting credit card contributions through a platform other than Contribute.

← Previous   Save & Continue
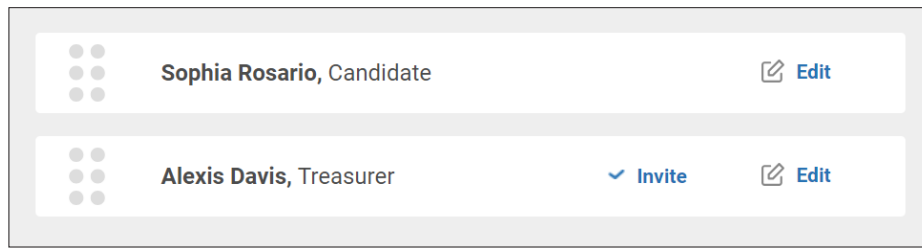
CAMPAIGN CONTACTS

All campaign contacts who will need to communicate with the CFB must be listed on the campaign's registration. The CFB will only communicate the details of campaign activities with committee representatives that appear on the committee registration. Use the **Add Contact** button on this page to add campaign staff members to the registration.

Note: You will be able to add (or remove) campaign contacts later by logging into the Portal and updating your registration.

Only the candidate and treasurer are required to link to the registration before submitting it to the CFB. Make sure that the email address you entered for both are correct since the registration invitation will be sent to those email addresses. If you want your campaign contacts to access the campaign's registration and, more importantly, C-SMART, you must invite them to the registration as well. If you are filling out the registration as a consultant or other campaign staff member, you must invite both the candidate and treasurer to link to the registration.

Note: If you are the candidate and filling out the registration, you must click on **Invite** to invite your treasurer to link to the registration (and vice versa) from this page. If you would like to add a campaign manager, consultant, individual with significant managerial control, or another contact, click Add Contact. Click Invite after adding additional contacts to grant them access to C-SMART and the VGSA.

The recipient of the invitation will receive an email with the subject "Invite to Registration" and must use the link in the email to connect to the registration. They cannot share this link since it is user and committee specific. This link is also unique and time sensitive. After they click on the link, they will be prompted to log into an existing Portal account or create a new account if they don't have one. Once they log in, your campaign card will appear on their dashboard. After the user links to your registration, you will no longer see the option to invite them.

SUBMITTING YOUR REGISTRATION

Upon filling out all required fields on the registration, the candidate and treasurer must submit the registration to the CFB. The CFB will not receive your registration until both the candidate and treasurer attempt the identity verification process and submit the registration.

Review

Review each field on this page to ensure the information is correct and does not include any typos. If you notice any errors, click **Edit** to update the information in that section of the registration. When you are ready, click the **Sign & Submit** button at the bottom right corner of the page.

Identity Verification

The LexisNexis identity verification can only be completed by the sole user associated with this account. No one else is authorized to complete this process on your behalf. The CFB does not collect or store any responses to the questions asked during LexisNexis verification.

Only click **Verify** if you are ready to begin and complete the LexisNexis identity verification process. If you become inactive during the next steps, the system will time out and your verification will automatically fail.

If you pass LexisNexis, indicate your agreement to each statement listed. When you are ready, click the **Submit** button at the bottom right corner of your page. If you fail the verification, you will be prompted to download a paper verification form. See the What to Expect Next section on page 18 for more information.

At this point, if you are a candidate who is also your own treasurer, your registration is now submitted to the CFB.

If you are the candidate or treasurer (but not both), you will receive an automated email notice confirming your part of the registration submission is complete. If you are the second user (either candidate or treasurer) who has not yet verified your identity in the Portal, you will be prompted to do so via the email sent to both users. Your registration will be in Draft mode until both the candidate and treasurer complete the identity verification process.

Note: Before attempting the identity verification process, the second user must first link to the registration via the invitation email (Subject: Invite to Registration). **Do not create a second, separate registration. Both the candidate and treasurer must complete the identity verification process for the same registration.**

The second user will need to complete the steps in this section after linking to the registration. When the second user is completing the identity verification process, they should review the registration for accuracy. If there is an error, the second user can make edits, complete the identity verification process, and submit the registration. However, once the registration is edited, it will negate the first user's verification and the first user will have to verify their identity again since the information has been changed.

At this point, both the candidate and treasurer have submitted identity verifications and your registration is now submitted to the CFB! You will receive a confirmation email notifying you that your registration has been submitted and is under review.

Note: You will receive a separate notification once your registration is approved.

WHAT TO EXPECT NEXT

Now that you have completed your identity verification process, your next steps will vary:

◆ If both the candidate and treasurer passed the LexisNexis verification process: you can expect to receive an automatic notice of registration approval or rejection via email from DoNotReply@nyccfb.info within 2-3 business days.

◆ If either or both the candidate and treasurer failed the Lexis Nexis identification process: the user(s) who failed will receive an email from DoNotReply@nyccfb.info with a link to a PDF identity verification form. Complete, sign, and notarize the document and email it as a PDF to Documents@nyccfb.info. The CFB must receive your identity verification form(s) within two weeks. You can then expect to receive notice of registration approval or rejection from the CFB via email within 2-3 business days.

Once your registration is approved, you will be assigned a Candidate Services liaison who will assist your campaign with next steps and throughout the election cycle.

Congratulations on registering your campaign and welcome to the CFB!