ORESTAR User's Manual: Candidacy Filing

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Introduction

ORS chapter 260, “Campaign Finance Regulation; Election Offenses,” requires disclosure of contributions and expenditures related to any candidate, measure, or political party active in any election including initiative, referendum and recall petition drives. The chapter requires that all political committees and petition committees file campaign finance transactions electronically. It also requires that the Secretary of State provide an electronic filing system to committees free of charge to comply with this requirement.

The system developed by the Secretary of State is called Oregon Elections System for Tracking and Reporting, or ORESTAR. It is a secure web-based application that can be accessed from any computer through the Internet.

ORESTAR enables committees to:

→ file a Statement of Organization for a new committee electronically

→ amend Statement of Organization information electronically

→ maintain a master list of contributors and payees in an address book

→ enter campaign finance transaction information

→ upload transaction and address book information via an XML file

→ validate transaction information prior to filing to ensure that all the required information is provided

→ file campaign finance transactions electronically

→ view exam letters identifying transaction insufficiencies

→ edit and file amended transactions

→ search for transactions or address book information

→ export transaction or address book information into Excel for creating labels, letters or for other analysis

→ file a Certificate of Limited Contributions and Expenditures

Each committee has an “account” in ORESTAR and only the candidate, treasurer and other authorized users designated by the candidate or treasurer have access to the account. All transactions entered into a committee’s account remain private until they are filed with the Elections Division. Once transactions are filed, the information immediately becomes available to the public in an online searchable database.

The system will calculate contributor and payee aggregates, determine when a transaction should be included in the ‘miscellaneous under $100’ category and file it as such, calculate the committee’s Account Summary totals, and calculate the due date for filing each transaction.

ORESTAR also allows a major political party or nonpartisan candidate for state office, or a candidate for US Senator or Representative in Congress, to file a Declaration of Candidacy and pay the fee electronically. Candidacy filings that are submitted electronically can also be amended and withdrawn electronically, if necessary.

This manual guides users through the process of filing a fee-based Declaration of Candidacy. There are separate user’s manuals for filing and managing a committee’s Statement of Organization and for filing campaign finance transactions using ORESTAR. The ORESTAR Statement of Organization manual also contains instructions for

creating user accounts and accessing the committee's account through the ORESTAR Private Workshop. Users may find it useful to review these manuals online while logged in to ORESTAR.

ORESTAR User's Manuals should be used in conjunction with the Campaign Finance Manual and the Candidate Manual, which are also published by the Elections Division. These manuals contain information about the legal requirements of campaign finance disclosure and candidate filing. All Elections Division publications and forms are available at www.oregonvotes.org.

Users can access ORESTAR at www.oregonvotes.org. This site should be bookmarked for repeated use.

Private Workshop

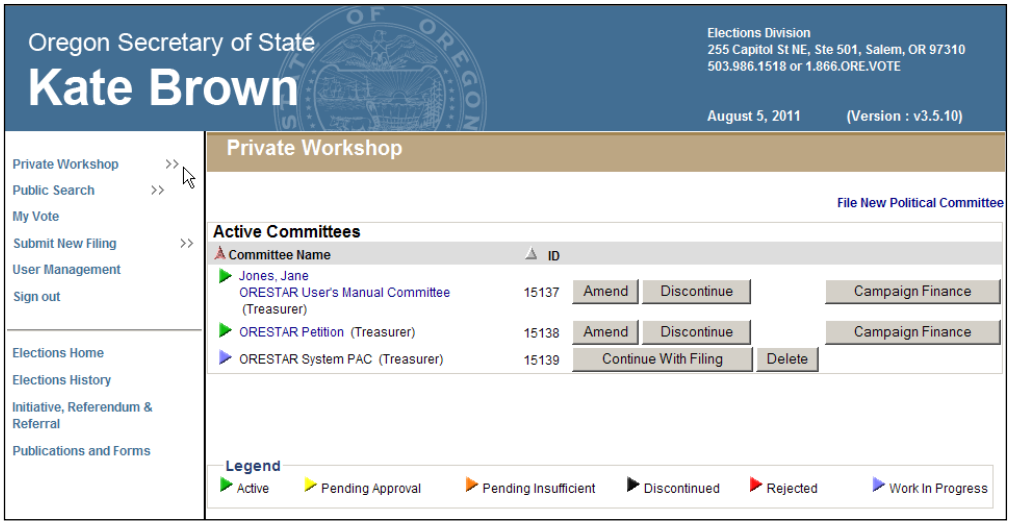
Logging In to ORESTAR

To log in to ORESTAR, go to www.oregonvotes.org and click on **Login** under the ORESTAR logo. Enter the user name and password and click on **Login** again. If you have not established a user name and password, select **Sign Up Now** and follow the instructions for **Creating a User Account** in the *ORESTAR User's Manual: Statement of Organization*.

A successful login from www.oregonvotes.org takes a user to the Private Workshop page in ORESTAR. However, in certain circumstances the user may be taken to the Home page of the user management portion of the system. To access the Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the page.

note
If you are having trouble logging in, close all browsers, open a new browser window and try again.

The Private Workshop is a user's home page in ORESTAR. The Private Workshop is unique to the user.



Navigation Menu

There is a vertical menu bar in the left frame of ORESTAR. Each menu item that is followed by a right arrow (>>), such as **Private Workshop**, can be expanded to show a submenu of pages. Clicking on **Private Workshop** expands/collapses the Active Committees, Discontinued Committees, Candidacy Filings, and Voters' Pamphlet Filings links.

The following is a description of each menu item:

→ **Private Workshop:** Displays a user's personal home page in ORESTAR. The Private Workshop defaults to the Active Committees page which contains a list of active committees the user has access to. Links to the Discontinued Committees page, the Candidacy Filings page, and the Voters' Pamphlet Filings page also display when the user expands the Private Workshop menu.

→ **Public Search:** Clicking the Public Search menu opens a list of links to the public search pages:

- Committee Search pages that allow a user to search for any committee registered with the Secretary of State. Searches can be performed by name information, election information or by measure or petition information;
- the Campaign Finance Transaction Search page that allows a user to search for transactions filed with the Secretary of State by all registered committees;
- the Campaign Finance Certificates Search page that allows a user to search for Certificates of Limited Contributions and Expenditures filed with the Secretary of State by calendar year; and
- the Candidate Filings Search page that allows a user to search for filings of candidacy for federal or state offices that are filed with the Secretary of State.

→ **Submit New Filing:** Clicking the Submit New Filing menu opens links to three filing options:

- File New Political Committee, which links to the Committee Type Information page, the first page when filing a Statement of Organization for a new committee.
- File Candidacy (federal and state offices), which displays the Candidate Information page, the first page when filing a Declaration of Candidacy. Only candidates for state office, US Senator and Representative in Congress in a primary election may use ORESTAR to file for candidacy.
- File Voters' Pamphlet Statement/Argument, which displays the filing type page, the first page when filing a Voters' Pamphlet statement or argument.

→ **User Management:** Accesses the user management portion of the system where a user can request access to a committee, update profile information or change passwords. Authorized users can also approve an individual's request for access to a committee's account or change a user's role.

→ **Sign Out:** Logs the user out of the system. The user should close the browser after logging out.

Private Workshop Pages

The Private Workshop pages and a brief description of each follow:

→ **Active Committees:** This page displays a list of active committees associated with the logged-in user. The user's role with each committee determines the function buttons that display.

→ **Discontinued Committees:** This page displays a list of discontinued committees associated with the logged-in user. Only the **Campaign Finance** button displays.

→ **Candidacy Filings:** This page is used by candidates and it displays a list of candidacy filings the logged-in user has filed.

→ **Voters' Pamphlet Filings:** This page displays a list of Voters' Pamphlet statements and arguments the logged-in user is creating or has already filed.

Candidacy Filings Page

The Candidacy Filings page in the user's Private Workshop is used exclusively by major political party or nonpartisan candidates for state office, or candidates for US Senator or Representative in Congress. The Candidacy Filings page lists each candidacy filing the user has filed and appropriate function buttons display.

The function buttons display only if the action can be performed. For example, a candidate filing can be amended until 5pm on the candidate filing deadline. After the filing deadline, the Amend button is no longer available. See the Elections Division candidate manual for deadlines for filing for candidacy, including amending the filing, or withdrawing a candidate filing.

Function Buttons

For each candidacy filing listed in a user's Private Workshop up to three function buttons display. A brief description of the action performed by each button follows:

- **Amend:** This button allows the candidate to amend a candidacy filing.
- **Continue with Filing:** This button allows the candidate to continue with a work in progress candidacy filing. The Continue with Filing button replaces the Amend button when there is a work in progress candidacy filing.
- **Withdraw:** This button allows the candidate to withdraw a candidacy filing.
- **Delete:** This button allows the candidate to delete a work in progress candidacy filing. The Delete button replaces the Withdraw button when there is a work in progress candidacy filing.

Legend

Each candidacy filing has an arrow to the left of the election/office information identifying the status of the filing. The statuses are:

- **Pending (yellow):** Indicates that the candidate has filed a Declaration of Candidacy with the Elections Division but a determination has not been made as to whether the candidate is qualified for the office designated on the filing.
- **Qualified (green):** Indicates that the candidate has filed a Declaration of Candidacy and is qualified for the office designated on the filing.
- **Not Qualified (red):** Indicates that the candidate has filed a Declaration of Candidacy and the Elections Division determined that the candidate is not qualified for the office designated on the filing.
- **Work in Progress (blue):** Indicates that the candidate has started a Declaration of Candidacy that has not yet been filed with the Elections Division.
- **Withdrawn (black):** Indicates that the candidate had filed a Declaration of Candidacy, but has chosen to withdraw the filing.

Filing of Candidacy

This section guides a user through the process of filing a fee-based Declaration of Candidacy. The filing of candidacy must be done by the candidate and the candidate must be a registered user in ORESTAR. If the candidate is not already registered in ORESTAR, the instructions for **Creating a User Account** are located in the *ORESTAR User's Manual: Statement of Organization*.

Only major political party or nonpartisan candidates for state office, United States Senators or Representatives in Congress may file candidacy for the primary election electronically in ORESTAR. The filing fee must be paid online by credit card at the time of filing. Both VISA and MasterCard are accepted. Candidate filings that are submitted electronically can also be amended or withdrawn electronically, if necessary.

State office includes: Governor, Secretary of State, State Treasurer, Attorney General, Commissioner of the Bureau of Labor and Industries, State Senator, State Representative, Judge of the Supreme Court, Judge of the Court of Appeals, Judge of the Oregon Tax Court, Judge of the Circuit Court, District Attorney, and County Judge positions where the office holder exercises judicial junctions. **See the Elections Division candidate manual for deadlines** for filing candidacy, including amending the filing, or withdrawing a candidate filing. Manuals are available at http://www.oregonvotes.org.

All information on a candidacy filing is public record and viewable by the public on ORESTAR. Personal information, such as residence address, home phone number and personal email address of a candidate, can be blocked from public access if the candidate has been granted a public disclosure exemption under ORS 192.445.

note
Major political party or nonpartisan candidates using the petition process to gain ballot access, candidates filing a Declaration of Candidacy to fill a vacancy in nomination for the General Election, and minor political party or independent candidates must continue to file using the paper forms. They cannot file candidacy using ORESTAR.

Filing a Declaration of Candidacy

To file candidacy, log in to ORESTAR (see page 10), access the Private Workshop page and proceed with the following:

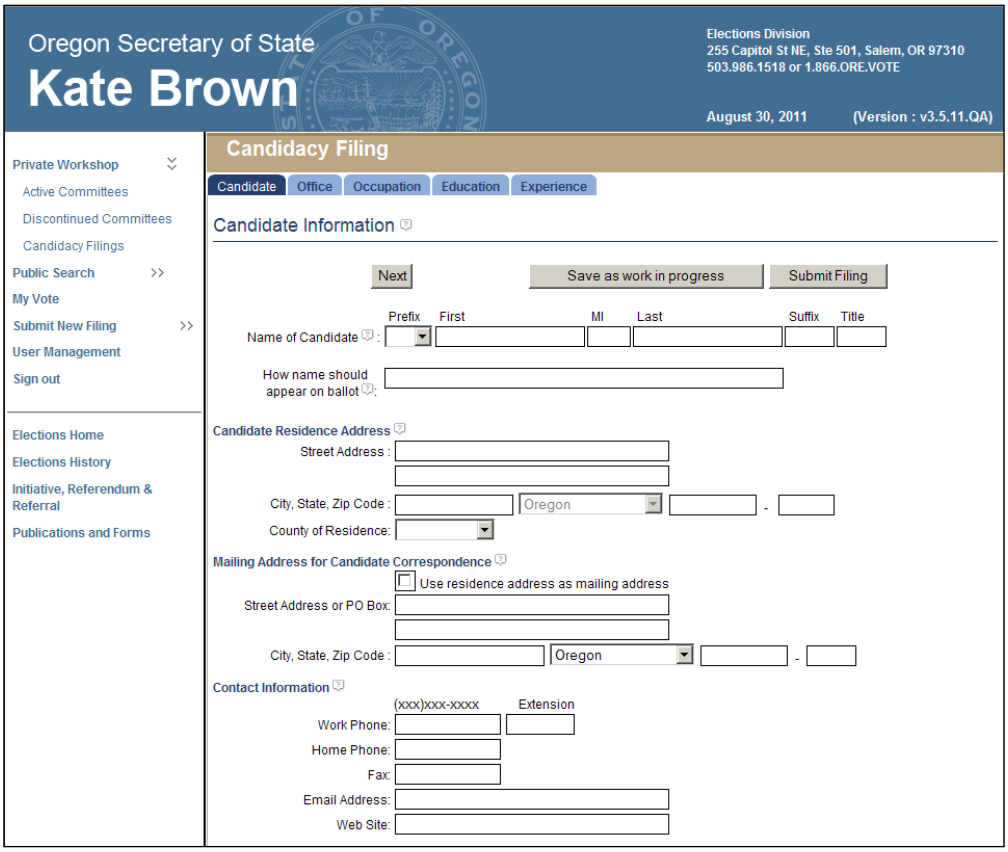
1 In the left menu bar, click on **Submit New Filing >>** and File Candidacy (federal and state offices). Alternatively, use the File Candidacy (federal and state offices) link in the upper right of the Candidacy Filings page.

The Candidate Information page is the first of the Candidacy Filing entry pages. Use the tab key on the keyboard to move between fields on a single page or click in the field with the mouse pointer. Use the **Back** and **Next** buttons or click on the tabs in the tab bar to navigate between pages.

Two additional function buttons display on all Candidacy Filing entry pages:

→ **Save as work in progress** allows a user to save an incomplete filing at any time and immediately continue with the filing or return at a later time to complete the filing. A work in progress filing can be accessed at a later time from a user's Private Workshop by clicking on the **Continue with Filing** button. A work in progress candidacy filing does not become public record until the user submits the filing and it is approved by the Elections Division.

→ **Submit Filing** performs validation on the candidacy filing and notifies the user of any errors. If no errors are found, the candidate is presented with the Attestation page where the candidate electronically signs the candidacy filing and files it with the Elections Division.



2 Enter the following information about the candidate:

→ **Name of Candidate:** The candidate's name (first, middle and last) is automatically populated from the user profile and cannot be modified. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) fields can be added if desired.

→ **How name should appear on ballot:** How the candidate wishes his/her name to appear on the ballot. If a nickname is used in connection with the candidate's full name, the nickname should be in parentheses. Titles and designations (e.g., Dr., CPA) should not be included as they cannot appear on the ballot.

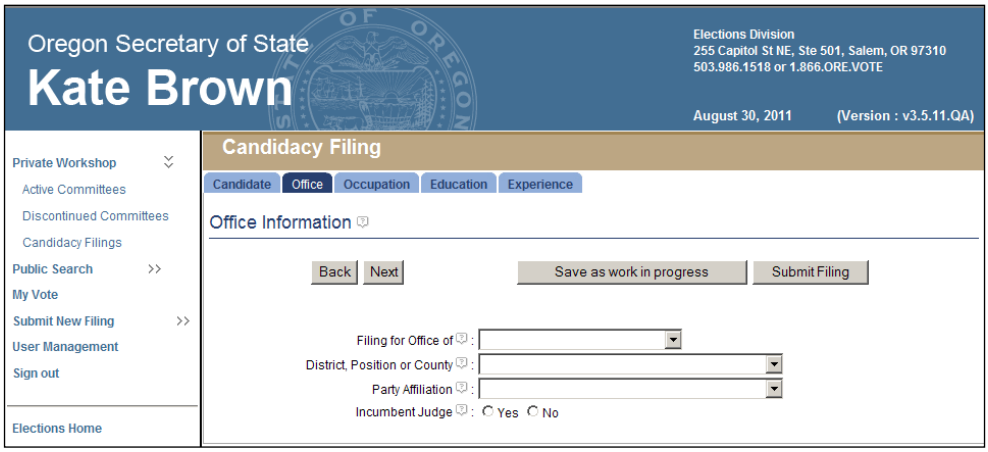
→ **Candidate Residence Address:** The address of the residence of the candidate, including the county.

→ **Mailing Address for Candidate Correspondence:** The address where the candidate wishes to receive correspondence from the Elections Division. To use the residence address as the mailing address for candidate correspondence, click in the checkbox.

note
Most correspondence is sent via email unless the correspondence is specifically required to be sent via the US Postal Service. Email correspondence is sent to the email address listed in **Contact Information**.

→ **Contact Information:** Enter work phone, home phone, fax, email address and website, if applicable. **An email address is required**.

3 Click on **Next**. The Office Information page displays.



4 Enter the following information about the office the candidate is filing for. The fields are completed using drop-down menus. To complete each field, click on the down arrow and choose the appropriate value from the list.

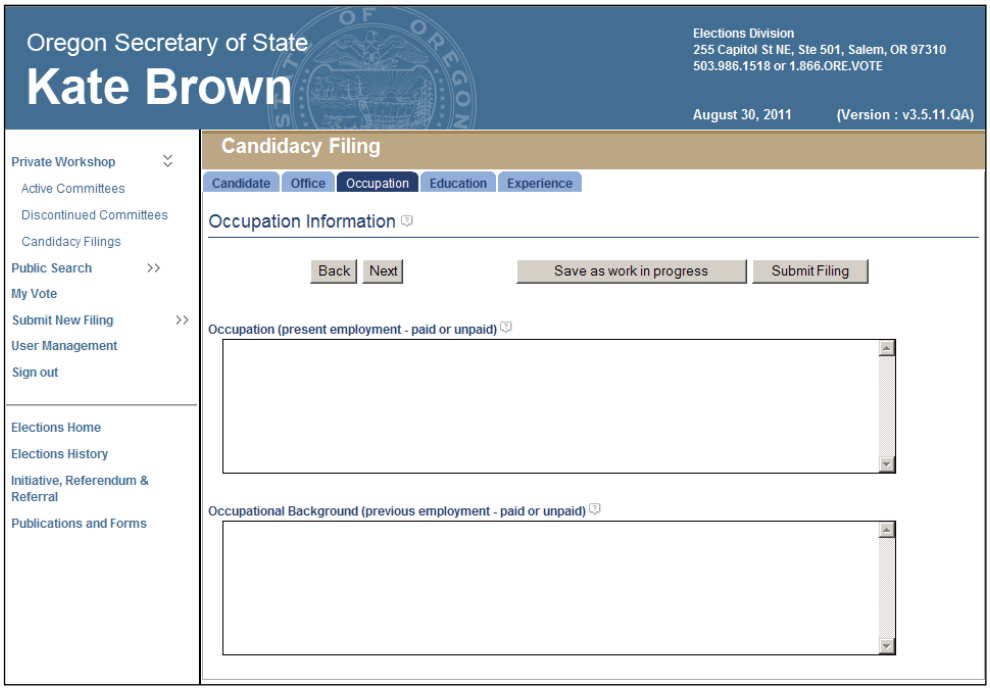
→ **Filing for Office of:** Select the office the candidate is filing for.

→ **District, Position or County:** Select the district, position or county of the office the candidate is filing for.

→ **Party Affiliation:** Select the candidate's party affiliation. 'Nonpartisan' will automatically populate if the office selected is nonpartisan.

→ **Incumbent Judge:** If filing for a state judge position, indicate if the candidate is the incumbent judge by selecting Yes or No.

5 Click on **Next**. The Occupation Information page displays.

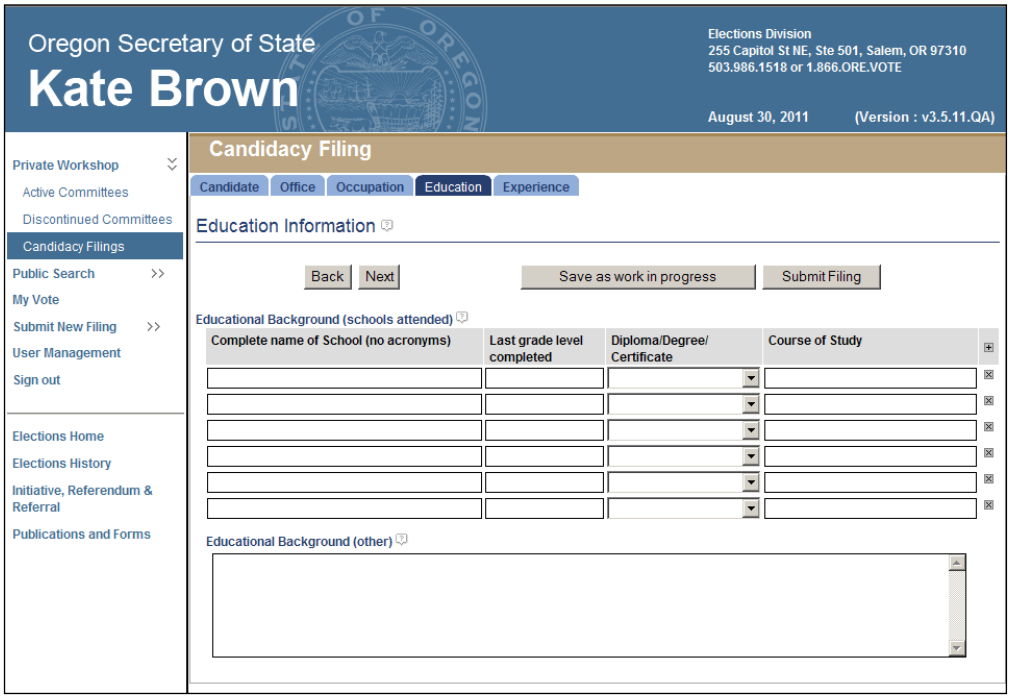


6 Enter the following information about the candidate's occupational experience:

→ **Occupation (present employment – paid or unpaid):** The current full or part-time employment or other line of work, business, craft or professional information (not required to indicate whether paid or not paid). If not employed, enter "Not Employed" or "None".

→ **Occupational Background (previous employment – paid or unpaid):** Previous full or part-time employment or other line of work, business, craft or professional information (not required to indicate whether paid or not paid).

7 Click on **Next**. The Education Information page displays.



8 Enter the following information about the candidate's education:

→ **Educational Background (schools attended):** The schools attended by the candidate, including the last grade level completed, whether a diploma, degree or certificate was received, and the course of study. It is not required that every educational experience be listed, but what is listed must be accurate.

→ **Educational Background (other):** Other educational experiences of the candidate.

9 Click on **Next**. The Experience page displays.

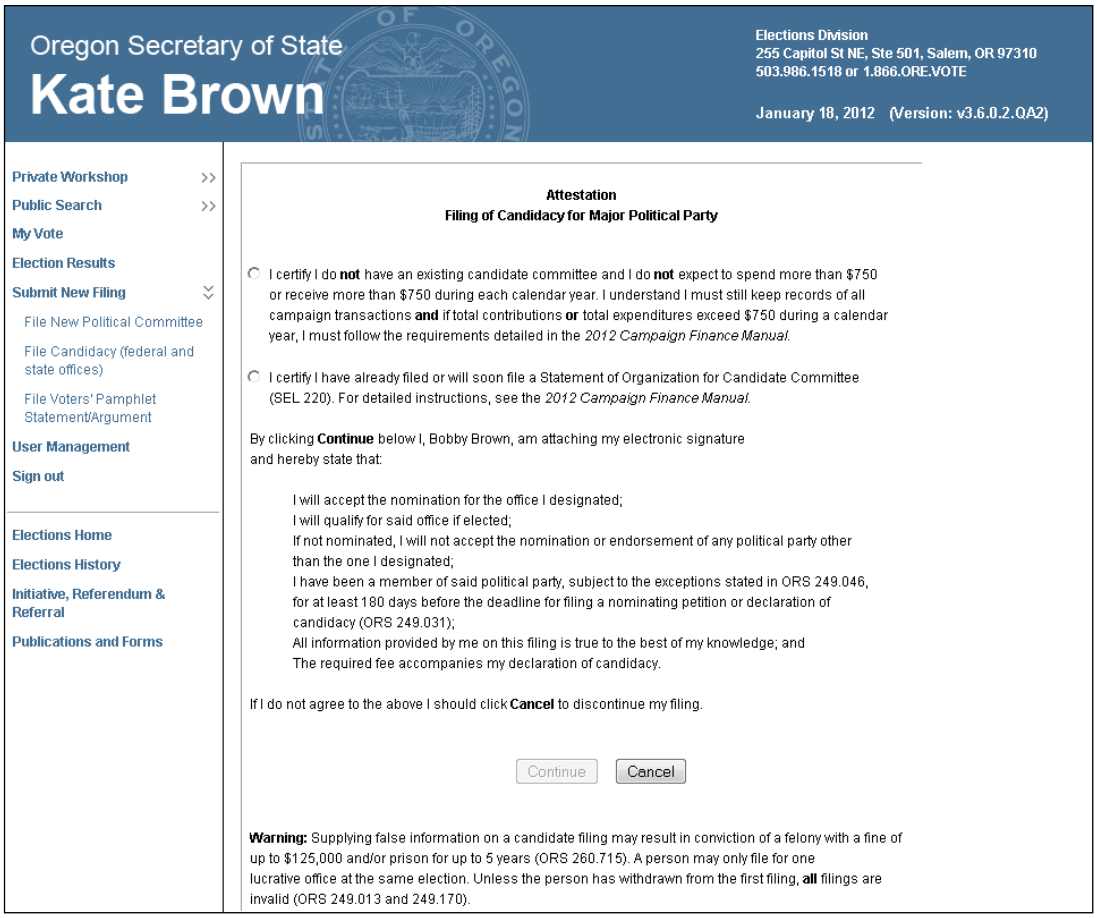
10 Enter the following information about the candidate's prior governmental experience:

→ **Prior Governmental Experience (elected or appointed):** The current or previous governmental experience, which refers to a person's involvement in governmental activities, such as appointed boards and commissions, elected boards and other elected or appointed public offices. Full or part-time, paid or unpaid or volunteer experience may be included (not required to indicate whether paid or not paid). If the candidate has no prior governmental experience, enter "None".

11 When the candidacy filing has been completed, click on **Submit Filing**. The filing is validated and if no errors are found, the Attestation page displays for the candidate's electronic signature.

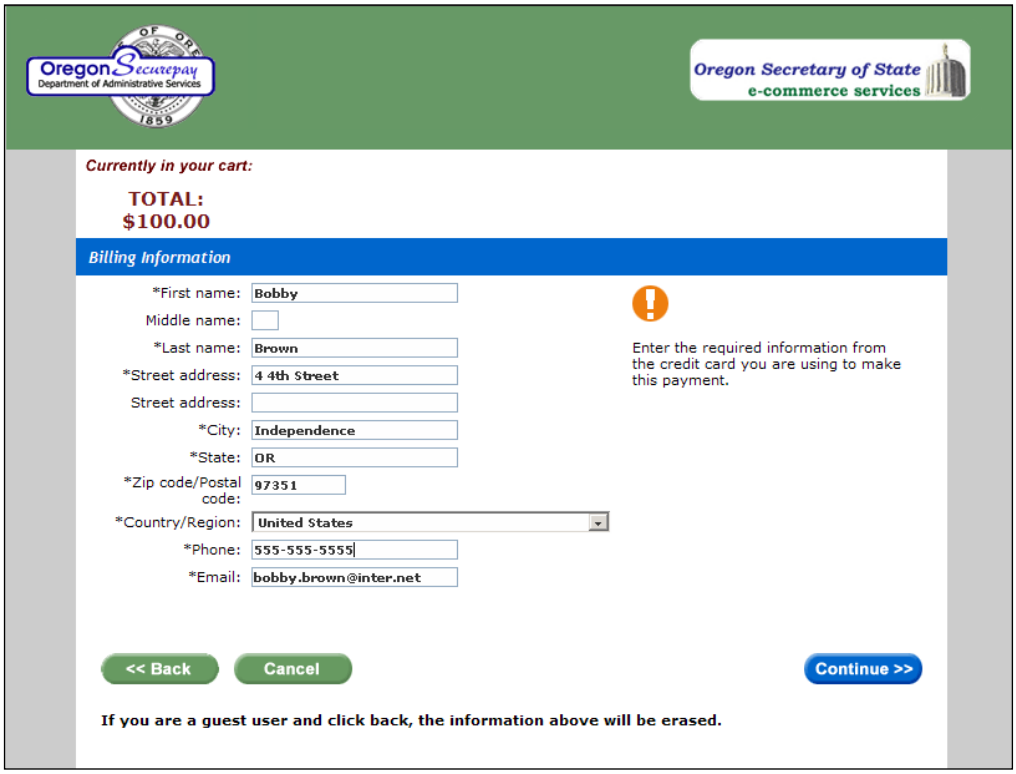
If errors are found during the validation process, the user is returned to the data entry screen where the first error exists. A message identifying the number of errors found displays at the top of the page. Messages identifying specific errors display above the fields in error. A user must fix all errors and click on **Submit Filing** again.

12 If filing for a state office, the candidate must certify on the Attestation page whether or not he or she has set up a candidate committee by clicking in the circle next to the appropriate statement.



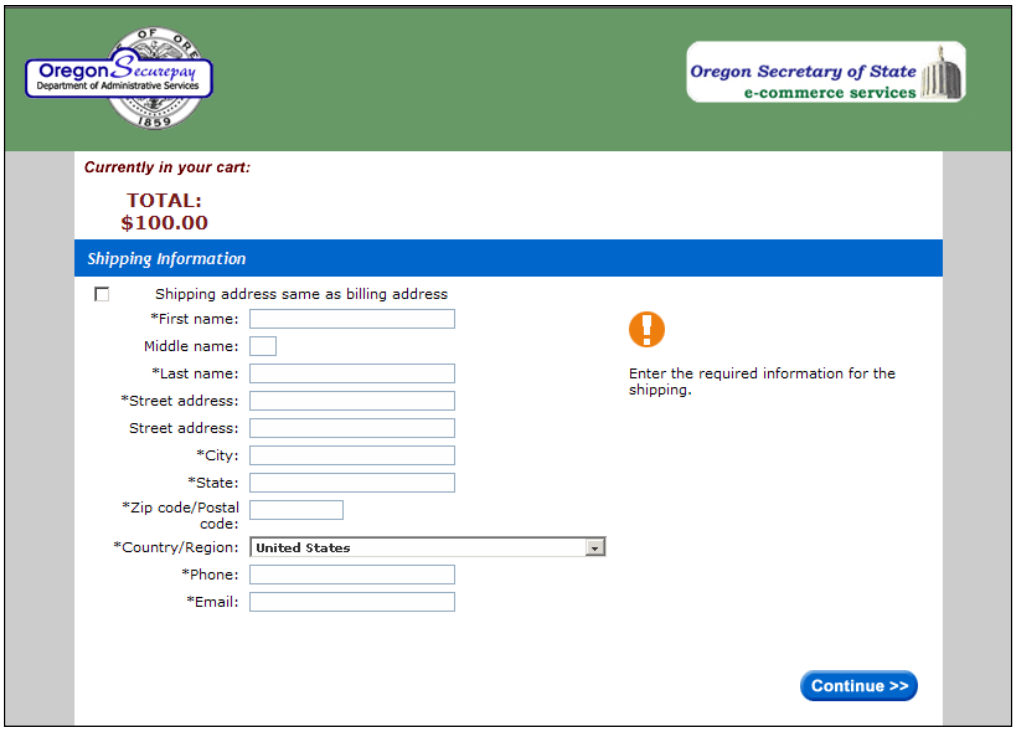
13 Read the attestation and if agreed, click on the **Continue** button to attest with your electronic signature and proceed to the Oregon Securepay system where the online payment of the candidate filing fee is processed.

14 The Billing Information page of the online payment checkout displays.

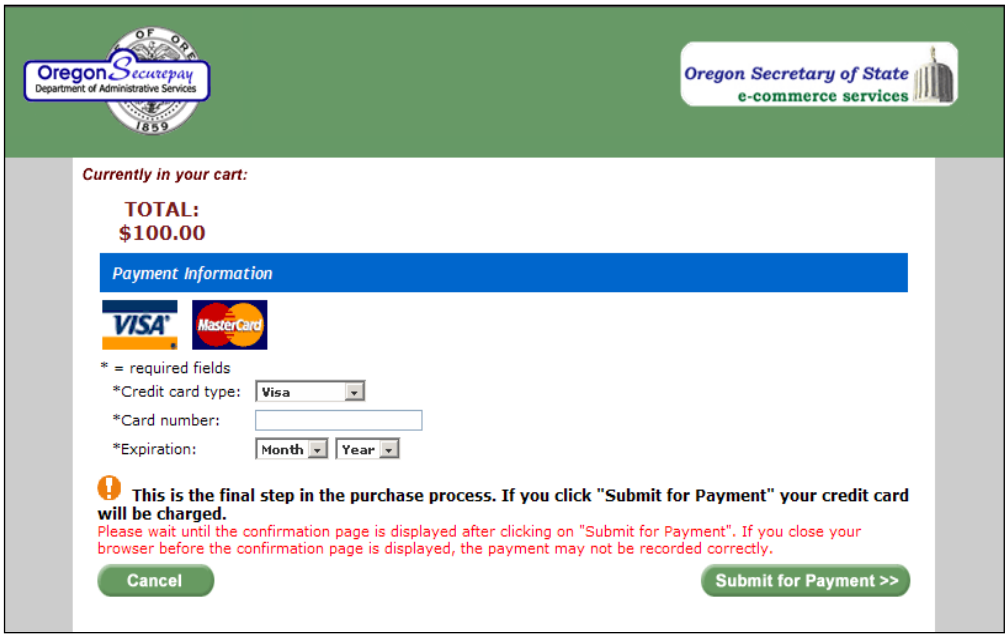


15 Enter and confirm your information and click on the **Continue >>** button.

16 The Shipping Information page displays. For a candidate filing, nothing is shipped to the candidate. Check the box that indicates “Shipping address same as billing address” and click **Continue >>**.



17 Enter your credit card number and select the expiration month and expiration year on the Payment Information page.



18 Click on the **Submit for Payment >>** button on the Payment Information page. The user returns to ORESTAR and a payment confirmation page displays. The information on the page is also emailed to the user.

note
Wait until you see the payment confirmation page before closing your browser.

19 Click on the **Continue** button to return to the Private Workshop.

Amending a Candidacy Filing

To amend a candidacy filing, proceed with the following:

1 Click on the **Amend** button associated with the candidacy filing on the Private Workshop. The candidacy filing data entry screens display with the data from the most recent candidacy filing.

2 Make the appropriate changes and click on **Submit Filing**. The Attestation page displays.

3 Read the attestation and click on the **File** button to attest and file the amended candidacy filing with the Elections Division.

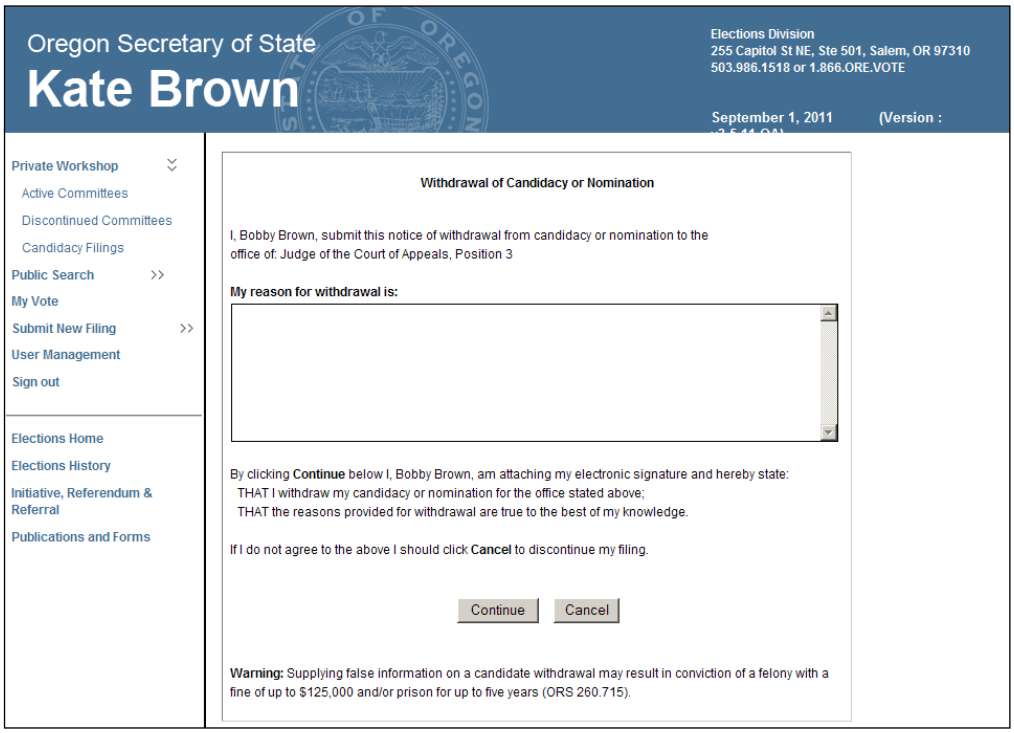
note
A candidate filing can be amended in ORESTAR until 5pm on the candidate filing deadline for the primary election. However, the office designated on a candidacy filing cannot be amended. To change offices, the candidate must withdraw the candidacy filing and submit a new Filing of Candidacy.

Withdrawing a Candidacy Filing

To withdraw a candidacy filing, proceed with the following:

1 Click on the **Withdraw** button associated with the candidacy filing on the Private Workshop. The Withdrawal of Candidacy or Nomination page displays.

note
See the applicable candidate manual for deadlines for filing for candidacy, including amending the filing, or withdrawing a candidate filing.



2 Enter the reason for the withdrawal.

3 Read the attestation and click on the **Continue** button to attest and file the withdrawal of candidacy with the Elections Division.

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