



## The Methodology of Amending Reports

It is always best practice to enter complete and accurate information before filing a report in TRACER. However, even the most diligent filers will occasionally make mistakes, and even the most detailed entries can be subject to change. The Secretary of State's Office recognizes these realities and created the following informational resource to help candidates and committees complete their amendments in TRACER.

### Reasons to Amend a Report:

- To add forgotten or missed transactions
  - e.g. contribution deposits, expenditures/spending, etc.
- To correct an error on an existing transaction(s), or
- To add missing and/or required information.

### Possible Updates That Require Amending a Report (includes but is not limited to):

- For contributions:
  - Contribution type (e.g. monetary, non-monetary / in-kind, itemized, non-itemized etc.)
  - Date
  - Amount (including aggregate amounts)
  - Description (for non-monetary / in-kind contributions)
  - Contributor type (e.g. individual, committee, etc.)
  - Add a contributor's occupation / employer information
- For expenditures:
  - Expenditure type (e.g. monetary, non-monetary / in-kind, itemized, non-itemized etc.)
  - Date
  - Amount
  - Description
  - Payee (e.g. business, corporation, committee, individual, etc.)

\*Note: One must first update the specific transaction (e.g. contribution, expenditure, etc.) that requires a modification, *then* amend the respective report where that entry was originally filed.

### You Might Need to Amend a Report When:

- You discover an inaccurate or incomplete transaction in your filing history
- A transaction is changed for some reason
  - e.g. a contribution is returned, a contracted expenditure was never fulfilled, etc.

### Things to Research Before Filing an Amended Report:

- Whether the balance on a report will change or stay the same
- The number of transactions you need to update
- Whether the updated transactions cover multiple reporting periods
- The chronological order of the updated transactions if there are multiple updates

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