



## TRACER Tips

Below are our top 5 tips for a variety of categories. We'd like to expand this list so please send us your tips and maybe you'll see yours featured on a future version of this document. Contact Campaign Finance Support at [cpfhelp@sos.state.co.us](mailto:cpfhelp@sos.state.co.us) or 303-894-2200 (dial 3, then 1) if you need assistance.

### Browser usage

- Do not access TRACER through multiple windows within the same browser. Doing so can cause technical issues and errors in your disclosure reports.
- If you need multiple TRACER windows open at the once, you must use a different browser for each window. Ex. Chrome for contributions and Firefox for expenditures.
- Enable pop-up windows in your browser settings for TRACER. When exporting data or viewing reports TRACER may open the data/report in a separate Report Viewer window and your browser may block these windows if you do not allow pop-ups from TRACER.
- If TRACER fails to load in one browser, consider trying another browser. Feedback indicates clearing your cache, cookies, or browser history is an option to consider.
- TRACER is optimized for desktop or laptop computer use, but can also be accessed via smartphone or tablet.

### Logging into TRACER

- Is your caps lock on? Take your time when entering your login credentials. The User name field is not case sensitive; however, your PIN/password is case sensitive.
- "PIN" and "password" are used interchangeably and mean the same thing within TRACER.

- Keep your email address in TRACER up to date so you can use the “*Forgot your PIN?*” or “*Forgot your User Name?*” links. These are available after you have setup your login to TRACER the first time.
- When selecting a security question choose an answer that you will remember. TRACER will lock you out when too many failed login attempts have been made. In such an event, you may wish to click on “*Forgot my pin?*” and/or “*Forgot your User Name?*”, answer the security question, and the pin/user name will be provided for you. (The pin will appear on the screen; the user name will be e-mailed to the e-mail address on file.)
- Please contact Campaign Finance Support if you are an agent of multiple accounts and would like to use one set of login credentials to access all accounts.

### **Contribution Data Entry**

- Use the *Search* feature when entering a contributor. TRACER saves each contributor as a contact after they are entered the first time. This saves time on data entry the next time that individual contributes, so you won’t have to enter their data again. Using existing contact information to track future contributions helps to prevent duplicate contact records as well.

*Note: Use common name variations for contributors if you can’t find them through an initial search, but know that you previously entered them. E.g. Bill or Will for William; Chris for Christopher or Kris for Kristine; Jim or Jimmy for James; Bob or Rob for Robert, etc.*

- If a contributor’s information has changed from the last time they contributed, update their information prior to entering the new contribution. Use the “*Update a Contributor*” link found on the *Contributions* tab under *Contributor Maintenance*.
- Need to add employer and occupation information for a PENDING contribution? Use the *Update* link for that transaction, scroll to the *Contributor Information* section, select the “*Update the information about this contributor*” radio button and click on the “*Proceed with Contributor Change*” link. Make the necessary changes and click Save. If adding employer and occupation to a filed contribution call the Support Team for more tips, especially if there are multiple contributions that cover multiple reporting periods that need updates.
- On the contribution data entry page, you’ll see “*Lock Contribution Info*” in the *Contribution* section and “*Lock Contributor Info*” in the *Contributor Information* section.

Only use these check boxes if the information in each of those sections will NOT change for the next contribution entered.

*Note: The “Lock Contributor info” is helpful in cases where you may have held a fundraising event and received the same type of contribution from multiple contributors. Example: On X day you held an event and every contributor gave you a \$50 check.*

- Candidate Committees should use *Candidate* for the *Contributor Type* when a candidate contributes to their OWN candidate committee. Use the *Search* feature to select the candidate from TRACER (you don’t need to know the candidate’s TRACER ID number to use the Search feature).

*Note: When adding a contribution from a registered TRACER committee (e.g. political committees, small donor Committee, political party, etc.) you don’t need to know the committee’s TRACER ID number – just their name.*

### **Expenditure Data Entry**

- Use the *Search* feature when entering a payee (recipient receiving payment). TRACER saves each payee as a contact after they are entered the first time. This saves time on data entry the next time you use that payee so you won’t have to enter the data again and helps to prevent duplicate contact records.
- If a payee’s information has changed to update their information prior to entering the new expenditure. Use the “*Update a Payee*” link found on the *Expenditures* tab under *Payee Maintenance*.
- On the data entry page for an expenditure you’ll see “*Lock Expenditure Info*” in the *Expenditure* section and “*Lock Payee Info*” in the *Payee Information* section. Only use these check boxes if the information in each of those sections will NOT change for the next expenditure entered.
- When adding an expenditure, you made to a registered TRACER committee, make sure to choose the correct Payee type (e.g. political committees, small donor committee, political party, etc.) before using the *Search* feature. You don’t need to know the committee’s TRACER ID number to use the Search feature – just their name.
- Be mindful of electioneering communication reporting requirements in TRACER when entering a communications expenditure. If you’re not sure whether your expenditure

qualifies as an electioneering communication, TRACER provides an information link you can review before saving the transaction(s).

### **Filing a Report**

- After completing your data entry (contributions, expenditures, etc.) go file the *File Reports* tab, locate the report and file. Completing data entry does not constitute the filing of a report and the data is not viewable to the public. Once the report is filed the data is immediately viewable to the public.
- After clicking on “*View/File*” or “*Nothing to Report*” follow through the prompts until you receive an on-screen confirmation the report was filed (and make sure to click the “*Finished*” link). Then go to the *Filing History* section on the *File Reports* tab to see the filed report is shown under the *Filing History* section and is no longer under the *Reports Due* section.
- File on time to avoid the \$50 per day late filing penalty. Reports are due before midnight on their due date to avoid late filing penalties.
- Collect all transaction information and call our office before amending a report.
- Contact CPF Help if you need to update a transaction that is part of a 24-Hour report or 48-Hour report – updating these transactions may create additional reports that may only be removed by CPF support staff.

### **Audit Flags/Messages & Reconciling TRACER with your own records**

- Audit messages will appear when you enter an incomplete or invalid transaction, when you file a report that includes an incomplete or invalid transaction(s), and when you attempt to amend a report that includes an incomplete or invalid transaction(s).
- Pay attention to these audit messages and do not ignore them. Read them to determine if further action is needed. Contact Campaign Finance Support if you need help resolving an audit message on a report. Leaving them unresolved may result in a complaint being filed.

*Note: TRACER’s audit flags are not perfect. There might be cases where TRACER shows an audit, but the activity may be permissible for your committee but not another committee. Either way, committees should watch out for audit messages*

*and reach out to Campaign Finance Support if they're not sure about the activity or why an audit message(s) was generated.*

- Employer and Occupation fields are required for one-time contributions of \$100 or more if the contributor is a natural person. You have 30 days, from the date of the contribution, to get this information if not received at the time of the contribution. If unable to gather employer and occupation information within the 30-day timeframe, the committee must return the contribution on the 31<sup>st</sup> day after receiving the contribution.
- Contact Campaign Finance Support before amending a report.
- If your TRACER balance is off you may wish to use the *Reports* tab to export (using Excel or CSV) your contribution, expenditure or loan data from TRACER to make it easier to cross reference with your own records.

### **EDI (Electronic Data Interchange) Importing**

- This import process is for committees who enter transactions on a larger scale, e.g. hundreds of transactions in a given reporting period. It is not recommended that all committees use the EDI upload process.
- Read through the specification and tip documents and send Campaign Finance Support a test file before using one of the EDI import formats. Utilize the EDI Webinars (R9a, R9b, and R9c) on the Learn to Use TRACER page.
- Importing data does not constitute filing a report and the information is not viewable to the public. To actually file the data and make it public you must select the report associated with the imported data and file the report. See tips under Filing a Report.
- If your import file has 24-Hour Major Contributor or 48-Hour Independent Expenditure transactions and those transactions have already been entered in TRACER then use the "Exclude" check boxes when importing to avoid duplicate transactions and/or possible delinquent and duplicate report(s).
- You may import as often as you like. However, if the file contains activity already imported into TRACER (assuming the external reference ID hasn't changed – hint: it shouldn't change), TRACER will bypass/skip that transaction and the transaction data will show up in your import summary report as being bypassed/skipped.