

# INSTRUCTIONS FOR FILING CAMPAIGN STATEMENTS ELECTRONICALLY

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## INTRODUCTION

The Berkeley Election Reform Act (BERA) requires Berkeley campaign committees that raise or spend \$1,000 or more to file campaign statements electronically. The electronic statement is the filing of record, eliminating hard copies with original signatures for most filings. *Exception: The State Fair Political Practices Commission requires that the Form 410 (establishing, amending, or terminating a committee), filed with the Secretary of State and a copy filed with the City, be filed in paper with an original ink signature.*

To accommodate the electronic filing requirement, committee officers with responsibilities relating to filing and signing campaign statements (candidates, treasurers, assistant treasurers, and principle officers) should review this document and complete each section well in advance of filing deadlines:

- Section One – Creating user accounts for each filer
- Section Two – Filing Signature Verification Cards for electronic signature
- Section Three – Reviewing and signing electronic campaign statements

**It is important to create user accounts and obtain Signer IDs/PIN codes early. Failure to complete the processes in advance of filing deadlines may result in late filings and subsequent fines assessed by the City or the State Fair Political Practices Commission. There is no provision to extend filing deadlines.**

We offer variety of resources to assist you through these processes:

- One-on-one training is available from City Clerk staff by appointment;
- NetFile contains a user guide, videos, and help buttons on every screen; and
- Computers are available in the City Clerk Department for public access

The City Clerk Department is here to help. For assistance or to schedule an appointment, email us at [elections@cityofberkeley.info](mailto:elections@cityofberkeley.info) or call (510) 981-6908.

## SECTION ONE: CREATING A NETFILE USER ACCOUNT

If you do not already have a NetFile user account, start here. You will need an account if you either sign electronic campaign statements or if you enter data into the system. If you already have a NetFile user account, proceed to Section Two.

1. From an internet browser (Chrome is recommended), go to [www.netfile.com/filer](http://www.netfile.com/filer)
2. Under “Campaign Committee Filers” click **Create a New NetFile User**:

NetFile User Log In Get Help for this Page

E-Mail Address  
Enter Your NetFile User E-Mail Address

Password  
Enter Your NetFile User Password  
[Lost Your Password?](#)

Log In

**Campaign Committee Filers**  
New Campaign Committee Filers  
[Create a New NetFile User](#)

**Form 700 (SEI) Filers**  
New Form 700 Filers  
[New User? Request a Password](#)

**Lobbyist Filers**  
New Lobbyists  
[Registration and Links](#)

3. Type your email address twice in the spaces provided and click **Submit**:

NetFile **Political Campaign Committees Only!** Get Help for this Page

**IMPORTANT: Not for Form 700 (SEI) filers!**  
If you are required to file a Form 700 with your agency, do NOT use this form.  
Your filing agency creates your NetFile User for you.  
Contact your agency with questions.

**NetFile User Information**

Your E-Mail Address  
Enter your e-mail address

Confirm Your E-Mail Address  
Confirm your e-mail address

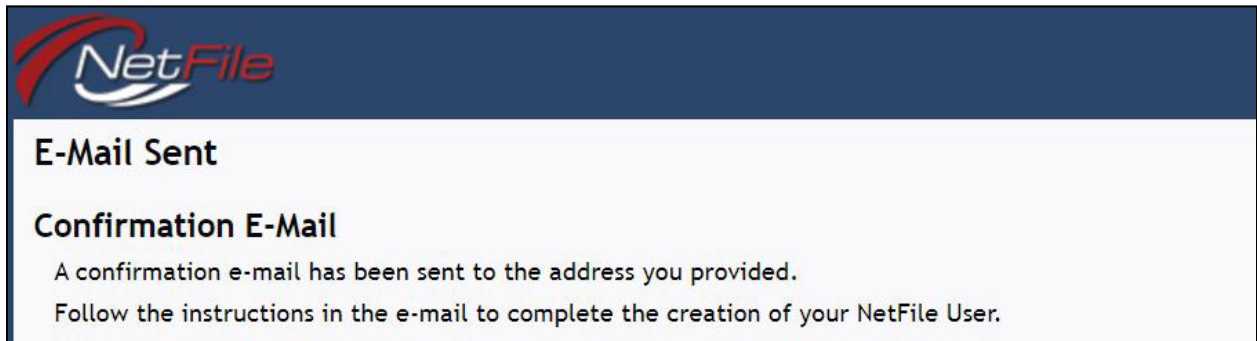
Submit

**Instructions**  
The system requires information in all fields to create your NetFile User.

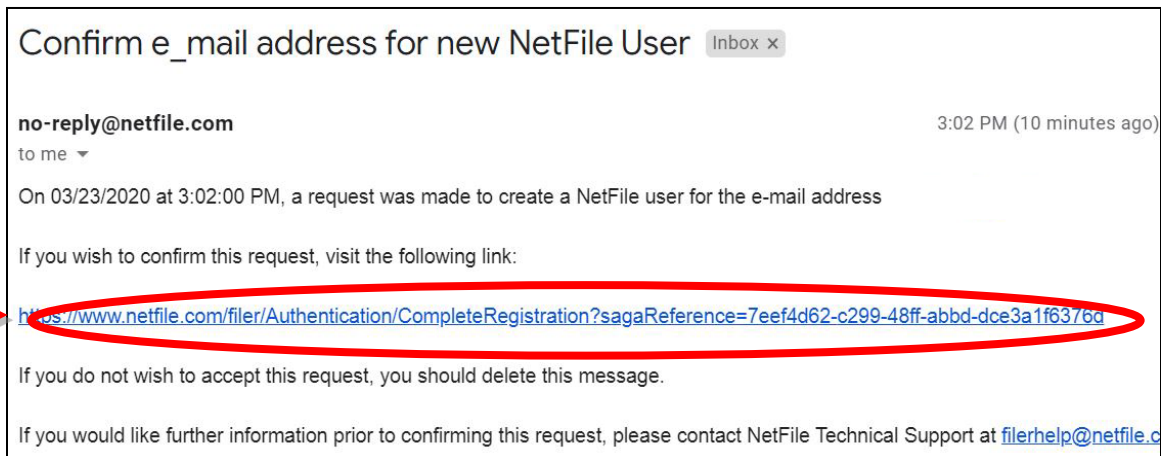
**Warning!** Providing ANY false information for your user profile is cause to delete your NetFile User and any data created with it!

**Create a NetFile User and Link Existing Campaign Accounts**  
Download the PDF file, [Create NetFile User & Link Existing Accounts](#), for instructions on creating a new NetFile User and linking your existing accounts.

4. The screen will update as shown below:



5. Open your email account and find the email from “[no-reply@netfile.com](mailto:no-reply@netfile.com)” (check your spam folder if the email hasn’t arrived in five minutes). Confirm the request to create an account by clicking the link contained in the email:



6. The link will take you back to NetFile. Complete the form, following the instructions on the screen, and click the **Create NetFile User** button:

A screenshot of the NetFile registration form. It includes fields for "Your First Name", "Your Last Name", "Your Daytime Phone", "Your Password", and "Your Confirmed Password". To the right, there are "Instructions" and "Password Information" sections. At the bottom, a red arrow points to the "Create NetFile User" button, which is circled in red.

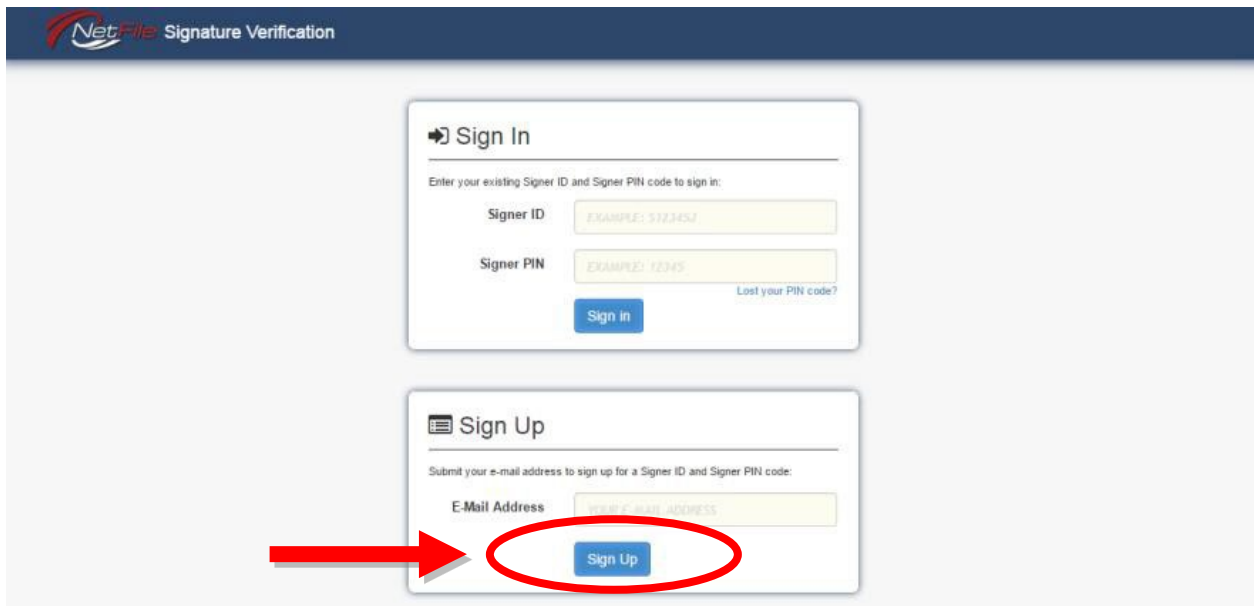
You have completed the registration for your NetFile user account. *You must still complete a Signature Verification Card before you can sign electronic documents.*

## SECTION TWO: COMPLETING A SIGNATURE VERIFICATION CARD

All committee officers (candidates, treasurers, assistant treasurers, and principal officers) with filing responsibilities must complete the signature verification card process so they can electronically sign campaign statements.

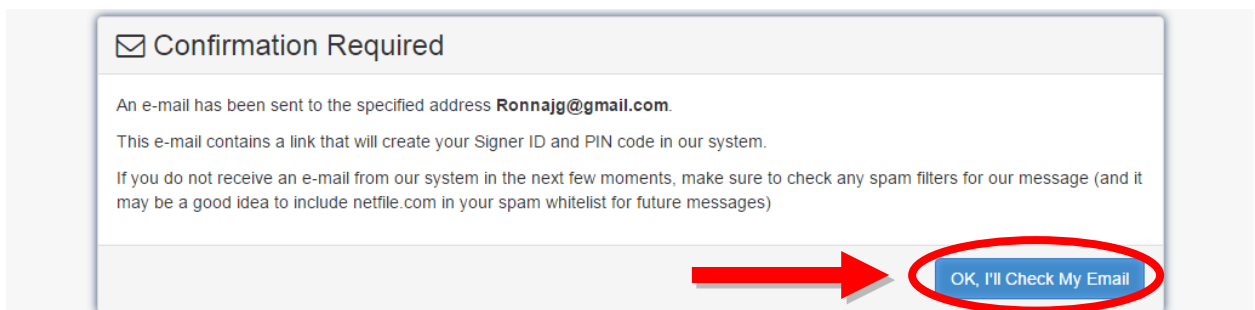
*NOTE: Do not use your browser's back button at any time during the process.*

1. From an internet browser (Chrome is recommended) go to: <https://netfile.com/sign>
2. In the lower half of the screen, enter your email address and click the **Sign Up** button:



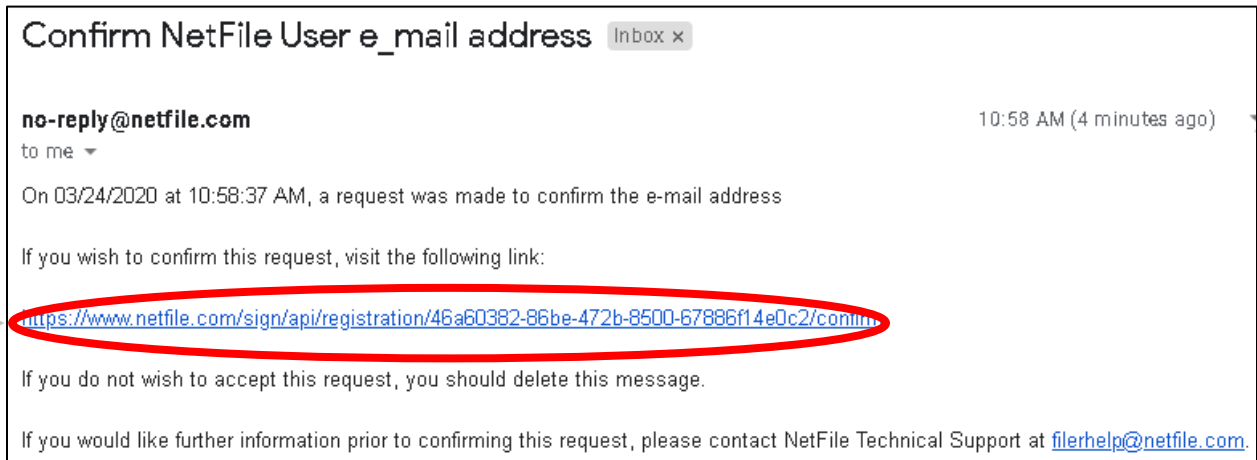
The screenshot shows the NetFile Signature Verification interface. At the top, there is a dark blue header with the NetFile logo and the text "Signature Verification". Below the header, there are two main sections: "Sign In" and "Sign Up". The "Sign In" section has a heading "Sign In" and a sub-heading "Enter your existing Signer ID and Signer PIN code to sign in:". It contains two input fields: "Signer ID" with a placeholder "EXAMPLE: S123456" and "Signer PIN" with a placeholder "EXAMPLE: 12345". A "Sign in" button is located below these fields. The "Sign Up" section has a heading "Sign Up" and a sub-heading "Submit your e-mail address to sign up for a Signer ID and Signer PIN code:". It contains one input field for "E-Mail Address" with a placeholder "YOUR E-MAIL ADDRESS". A "Sign Up" button is located below this field. A red arrow points to the "Sign Up" button, which is also circled in red.

3. The screen will update as shown below. Click the **OK, I'll Check My Email** button:

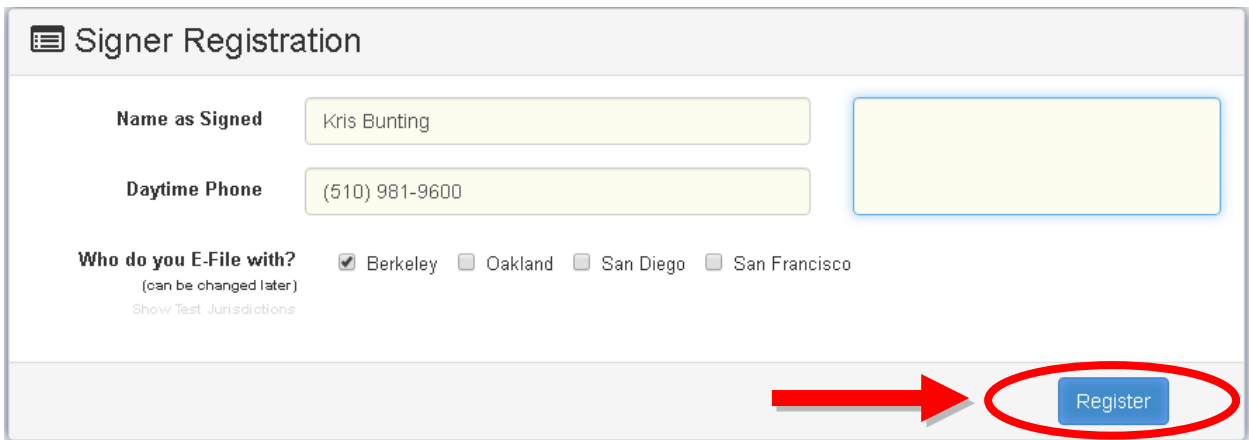


The screenshot shows a confirmation message box with a heading "Confirmation Required" and an envelope icon. The text inside the box reads: "An e-mail has been sent to the specified address **Ronnajg@gmail.com**. This e-mail contains a link that will create your Signer ID and PIN code in our system. If you do not receive an e-mail from our system in the next few moments, make sure to check any spam filters for our message (and it may be a good idea to include netfile.com in your spam whitelist for future messages)". At the bottom right of the box, there is a blue button with the text "OK, I'll Check My Email". A red arrow points to this button, which is also circled in red.

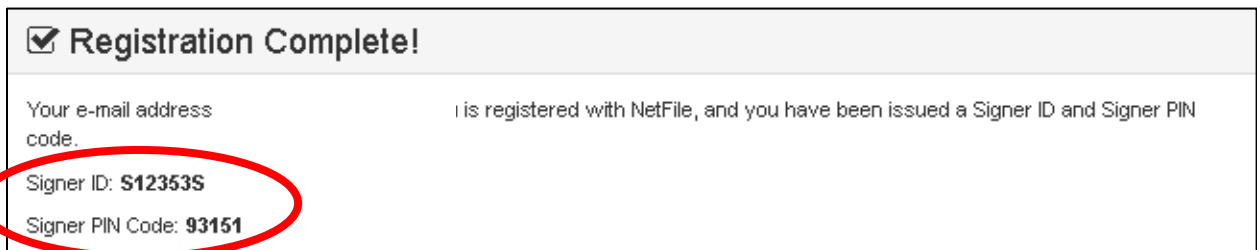
4. Open your email account and find the email from “[no-reply@netfile.com](mailto:no-reply@netfile.com)” asking you to confirm your email address (check your spam folder if the email hasn’t arrived in five minutes). Click on the link provided in the email:



5. Enter your name exactly as you wish for it to appear when signing documents. Enter your daytime phone number, click the **Berkeley** checkbox to indicate that you file with the City of Berkeley, and click the **Register** button:



6. **IMPORTANT:** This is the only time your Signer PIN Code will be displayed. Print this page and/or write the information in a secure place:




7. Scroll down the page and click the **Download Signature Card Packet** button.

A two-page PDF will open. Print the document. Carefully verify the information on the second page. **IMPORTANT – DO NOT SIGN THE FORM YET.**

**What to do next?**

1. [Print this page](#) for future reference as you will need your Signer PIN Code to accept or reject documents. Please make sure to keep this information in a safe location. **Your PIN code is your electronic signature!**
2. [Download and print your signature card packet](#). The packet contains a signature card for each jurisdiction you selected during registration.
3. Submit your signature card(s) to the appropriate jurisdiction(s). Each jurisdiction has different requirements for the submission of the physical signature cards they keep on file that are linked to your NetFile Signer ID. The packet contains submission instructions for each jurisdiction.

**⚠ Important!**  
A jurisdiction must receive and approve the appropriate physical signature card before your Signer ID becomes active and you are allowed to electronically sign e-filed documents *in that jurisdiction*.

 [Download Signature Card Packet](#) [Print this Page](#) [View Documents](#)

Below is a screenshot of a sample Signature Verification Card (page two of the PDF packet downloaded above):

	City of Berkeley City Clerk Department 2180 Milvia Street, 1 <sup>st</sup> Floor Berkeley, CA 94704 (510) 981-6900 clerk@cityofberkeley.info	<b>S12353S</b> 03/24/2020
<b>SIGNATURE VERIFICATION CARD</b> Electronic Campaign Statement Filing		
NAME: <u>Kris Bunting (Id# S12353S)</u>		
PHONE: <u>5109819600</u> E-MAIL ADDRESS: _____		
<b>IMPORTANT! The notification e-mail address listed above should be an address you check frequently!</b>		
<i>If you are submitting this form in person, you must show a government issued photo identification and sign this in the presence of City Clerk staff. If you are submitting this form by mail, you must have your signature acknowledged by a notary public.</i>		
By signing and submitting this Signature Verification Card, I acknowledge that documents filed electronically with the City of Berkeley using the ID number set forth above will bear my virtual signature and that I am signing such documents under penalty of perjury under the laws of the State of California. I also acknowledge that every electronically filed document bearing my virtual signature will be treated the same as a paper document bearing my actual signature for purposes of applicable state and local law.		
<u>X</u>	_____	_____
	SIGNATURE	DATE
<b>CITY CLERK STAFF USE ONLY</b>		
[ ] Filer Presented Government Issued Photo Identification		
_____		
	SIGNATURE OF CLERK STAFF	DATE
<b>NOTARY PUBLIC USE ONLY (Civil Code §1189)</b>		
State of California, County of _____ On, _____		
	County	Date
Before me _____,		
	Name and Title of Officer	
personally appeared _____		
	Name of Signer	
Place Notary Seal Here	<p>Who proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to the within instrument and acknowledged to me that he/she executed the same in his/her authorized capacity, and that by his/her signature on the instrument the person or the entity upon behalf of which the person acted, executed the instrument.</p> <p>I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct. WITNESS my hand and official seal.</p>	
	Signature _____	
		Signature of Notary Public

8. There are two options to complete the Signature Verification Card.

Option A

Bring the printed Signature Verification Card and your government issued photo identification to the City Clerk Department during normal business hours (2180 Milvia Street, 1<sup>st</sup> floor, Berkeley, CA 94704). You will sign the document in the presence of City Clerk Department staff.

Option B

Sign the statement in the presence of a notary public (who will witness the signature, confirm your identify, complete the acknowledgement on the document, sign, and apply their notary seal) and mail the completed document to our office.

Once your Signature Verification Card has been received and processed the City Clerk Department, you will be able to sign electronically filed statements.

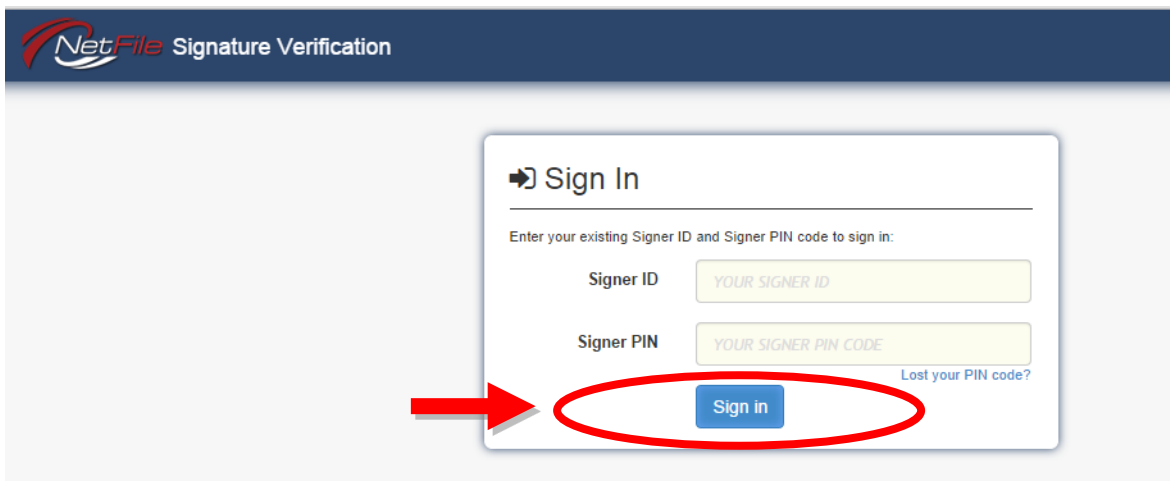
*NOTE: If you change any information in the Signature Verification Card system, you will need to submit a new Signature Verification Card.*



### SECTION THREE: VERIFYING AND SIGNING ELECTRONICALLY FILED CAMPAIGN STATEMENTS

After a campaign statement has been prepared in NetFile and submitted for e-filing by the treasurer, it must be signed electronically by all responsible officers (i.e., the appropriate combination of treasurer, candidate, principle officer, etc., as required). Once all parties have electronically signed, the campaign statement is automatically filed with the City Clerk Department and made available to the public online.

1. You will receive an email from NetFile alerting you of a pending filing. Either click on the link provided in that email, or go to <https://netfile.com/sign>.
2. Enter your Signer ID and five-digit PIN code, then click the **Sign In** button:

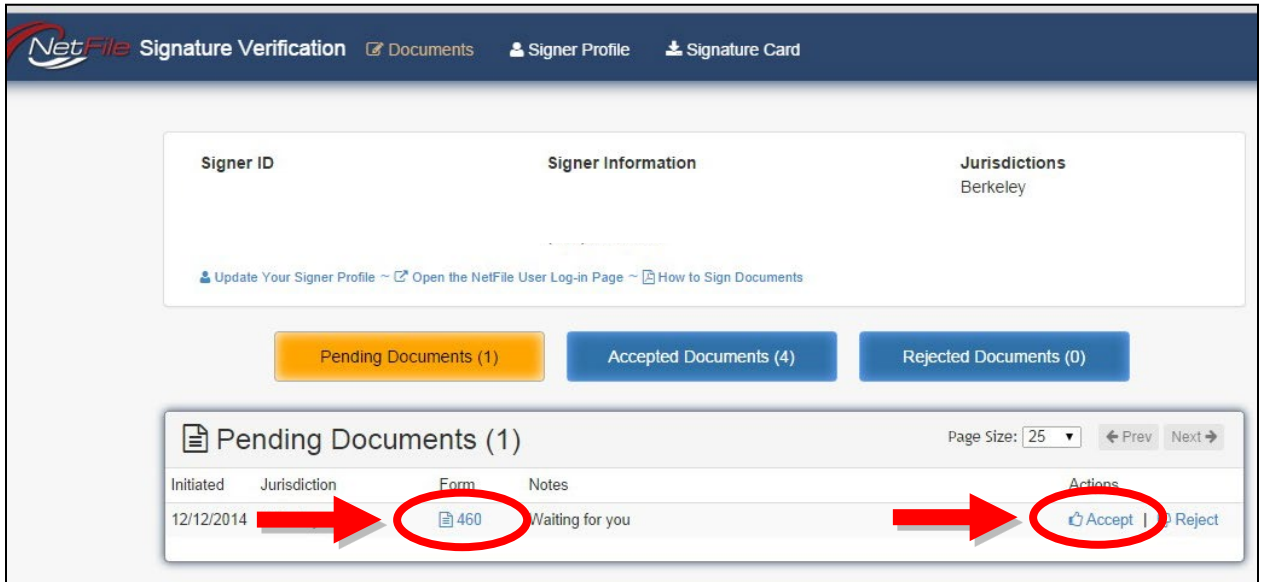


The Signer ID and PIN Code were provided to you by NetFile when you completed the Signature Verification Card process outlined above.

The City Clerk Department can help you find your Signer ID if you have lost the information (the Signer ID is seven characters, alpha-numeric, and begins with an “S” – e.g. S10999A).

The City Clerk Department does not have your PIN code. If you are unable to locate your PIN code, select “Lost your PIN Code?” link shown in the screenshot above and follow the online instructions.

- From the **Documents** screen, find the “Form” column. Click on the document type shown in blue to review the pending document as a PDF. In the screenshot below, the document type is “460”:



- To accept and sign the pending document, click on the word **Accept** shown in the screenshot above. Your filing is complete after all required signers complete this process – no further action is required. Note that the system does not confirm that your signature has been accepted.

Statements are not accepted for filing until **ALL** of the signers indicated on the draft statement have completed the signature process by reviewing and accepting the statement.

After all signers have approved the filing, you may view the filed document online from the Public Access Portal (<http://static.netfile.com/agency/brkl/>):

