

# ORESTAR User's Manual: Statement of Organization

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Secretary of State

Elections Division

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# Introduction

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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 processes of filing and managing a committee's Statement of Organization. There are separate user's manuals for filing campaign finance transactions and for filing a fee-based Declaration of Candidacy using ORESTAR. 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](http://www.oregonvotes.org).

Users can access ORESTAR at [www.oregonvotes.org](http://www.oregonvotes.org). This site should be bookmarked for repeated use.





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# System Information

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## System Requirements

ORESTAR can be run on any computer with Internet access. There is no need to install software on the computer. The web pages are best viewed using Microsoft Internet Explorer 7.x, Mozilla Firefox 3.x or Safari 3.x as the web browser. Other browsers may work as well, but if problems are experienced, switch to one of these.

ORESTAR requires that JavaScript be enabled. This is the standard setting for most browsers.

To enable JavaScript in Microsoft Internet Explorer, proceed with the following:

- 1 Open the browser.
- 2 Select Tools, then Internet Options from the browser menu.
- 3 Click on the Security tab.
- 4 Click on the Internet icon.
- 5 If the security level is set to Medium or lower, click Cancel and no further changes are needed. If the security level is Custom or High, click the Custom Level button, navigate to Scripting, Active Scripting and click the radio button next to Enable. Click OK on the Security Settings panel and then click OK on the Internet Options panel.

Cookies must be enabled to log in to ORESTAR. Again, this is the standard setting for most browsers. Cookies allow ORESTAR to recognize the user and customize the web pages for that user (e.g., only display committees associated with the user in the Private Workshop).

To enable Cookies in Microsoft Internet Explorer, proceed with the following:

- 1 Open the browser.
- 2 Select Tools, Internet Options from the menu.
- 3 Click on the Privacy tab.
- 4 If the security level is set to Medium or lower, click Cancel and no further changes are needed. If the security level is higher than Medium, click the Sites button and follow the directions on the Per Site Privacy Actions panel to allow cookies from portal.sos.state.or.us and secure.sos.state.or.us. Click OK on Per Site Privacy Actions panel and then click OK on the Internet Options panel.

### **note**

The Secretary of State's office is not advocating that a particular security level is appropriate for each user's Internet browsing needs. The instructions above merely explain how to make the settings that will allow the ORESTAR application to run on an Internet browser.

### **Internet Connection Speed**

The Elections Division recommends a high-speed connection like DSL, Cable, High-Speed Wireless or Satellite. While ORESTAR will run over a dial-up connection, the system may not provide what some users would consider acceptable performance at that speed. If you are a user with a dial-up connection who is experiencing slow speeds, we recommend upgrading to high speed or use high speed through a local library or other establishments that offer such service.

### **Security**

Security for all interactive Secretary of State web applications is managed by a single Secure Access System. This is the system that will store user names and passwords. It also has functions that allow a user to receive a new password if the user's current password is forgotten, update a user's account profile, change passwords, and request additional access rights. Further information about the Secure Access System is documented in the Privacy Policy and FAQs. These documents can be accessed by clicking on the ORESTAR login link at [www.oregonvotes.org](http://www.oregonvotes.org).

ORESTAR uses industry standard Secure Socket Layer encryption to protect a user's information as it travels across the Internet. As part of this protocol, depending on how the browser is configured, a user may be prompted to accept an SSL certificate. It is necessary to accept the certificate in order to access ORESTAR.

#### ***note***

It is standard practice for secure web applications to limit the amount of time a user can remain logged in with no activity. For the ORESTAR system, the time limit is 35 minutes. It is recommended that a user save work frequently. If work is not saved and the ORESTAR connection closes due to inactivity, all unsaved work is lost.

### **Firewalls**

Firewalls are a type of software designed to isolate a computer or a network of computers from other networks, including the Internet. Though firewalls are primarily found in offices, they are quickly making their way into the homes of DSL and cable-modem subscribers. They are a very useful tool to protect data and resources but they may interfere with some interactive applications.

We do not anticipate any problems accessing ORESTAR through a firewall. ORESTAR runs on the standard port for the HTTPS protocol (port 443). If problems occur while trying to access ORESTAR, check with the system's network administrator or with a computer support technician to find out if current firewall settings allow traffic over port 443.

### **System Availability**

ORESTAR is hosted on the Secretary of State's secure application and database servers. The targeted availability for this application is 24 hours a day, seven days a week with the exception of a backup downtime period between 2am and 6am Sunday mornings. However, this is not a guarantee.

Our support staff is available from 8am to 5pm, Monday through Friday. When problems occur at night or on the weekends, they will generally not be resolved until the following business day. There will also be an occasional need for downtime to load system patches or release new versions. To the extent that these events require significant downtime, they will be scheduled and notification will be posted on our website.



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# Creating and Managing a User Account

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This section guides a user through the process of creating a user account and requesting access to an existing committee, if appropriate. It also includes instructions for updating a user account, changing a password or replacing a forgotten password.

**note**

- **Each individual should only register once.**  
Do not create more than one user account, even if you serve in different roles or on multiple committees.
- **Do not create a user account for another person.**
- **Do not log in to another user's account.**

### Who Must Create a User Account

The following individuals must register by creating a user account:

- a candidate and treasurer associated with a committee in ORESTAR (including a committee that is filed using the paper forms and data entered into ORESTAR by the Elections Division)
- a candidate and treasurer preparing to register a new committee electronically in ORESTAR
- a treasurer registering a political action committee or petition committee
- an individual designated as the alternate transaction filer for a committee
- an individual who will perform data entry of campaign finance transactions for a committee
- a vendor who will upload XML files containing campaign finance transactions for a committee
- a candidate preparing to file a Declaration of Candidacy electronically in ORESTAR  
Only candidates for state office, US Senator and Representative in Congress in a primary election may use ORESTAR to file for candidacy; see the ORESTAR Candidacy Filing manual for more information

A person designated to receive notices sent under ORS chapters 246 to 260 (Correspondence Recipient) or a public user **should not** create a user account in ORESTAR.

## Creating a User Account

### **Remember!**

**A user should create only one user account.** Each individual should only have one user name. The same user name can be used for a person associated with multiple committees.

To register, proceed with the following:

- 1 Go to [www.oregonvotes.org](http://www.oregonvotes.org) in the web browser and click on **Register** under the ORESTAR logo. The Oregon Secretary of State Secure Access System Login page displays.

**Oregon Secretary of State**  
**Kate Brown**

Oregon Secretary of State Secure Access System May 9, 2011 9:36 AM

**Enter your user name and password to login**

**User Name**

**Password**

Welcome to the Oregon Secretary of State Secure Access System. You have been directed here because you are trying to perform functions within the Secretary of State applications that require us to identify and authenticate before allowing you to access data.

The Sign Up Now button on the navigation bar to the left allows new customers to register and get a user name and password.


Returning customers can logon by entering their user name and password above.

There is also a Frequently Asked Questions or FAQ, a Contact Us and our Privacy Policy that provides the details concerning how we will use your personal information.

[Login](#)  
[Sign Up now](#)  
[Forgot Password](#)  
[Forgot User Name](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)

- 2 Click on **Sign Up Now** in the left navigation bar. The User Profile page displays.

**Oregon**  
**Secretary of State**  
**Kate Brown**



Oregon Secretary of State Secure Access System
May 9, 2011 9:46 AM

[Login](#)

[Sign Up now](#)

[Forgot Password](#)

[Forgot User Name](#)

[FAQs](#)

[Contact us](#)

[Privacy Policy](#)

**Sign Up Now** Required fields are **BOLD**

**First Name**  MI

**Last Name**

**Address**

**City, State** ,

**Zip**  -

Work Phone  Ext

Home Phone

**E-mail Address**

**User Name**  Minimum of six characters from A-Z and 0-9. No spaces or special characters. Your username is your unique identifier to all Secretary of State applications. Once registered, it cannot be changed.

**Password**   
Case sensitive. Minimum of eight characters with at least one numeric digit.

**Confirm Password**

The following information will help us verify your identity if you call for assistance with your account. We will read the question to you and expect you to respond with the answer entered.

**Select Question**

**Answer**

**Confirm Answer**

- 3 Complete the form. Required fields are **BOLD**.

The user name selected must be at least six characters and should not contain spaces or special characters. **The user name cannot be changed so choose one that is easy to remember.**

The password must be a minimum of eight characters and include at least one numeric digit. The password field is case sensitive so be sure to type in upper and lowercase as desired.

Select a question by clicking on the down arrow and choosing the desired question from the list. Enter the answer to the selected question and confirm the answer by entering it a second time. The question and answer will help the Elections Division identify a user if assistance with the user's account is required.

- 4 Click on **Submit**. The Application Management page displays.



**Oregon Secretary of State Kate Brown**

Welcome johnsmith to Oregon Secretary of State Secure Access System Apr 4, 2011 12:37 PM

**Home**  
[My Profile](#)  
[Change Password](#)  
[Application Mgmt](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)  
[Sign Out](#)

Choose ONE application from Your Selected Applications  
 OR  
 Choose ONE application from Additional Applications.

Then choose "Submit" and you will be asked for additional information regarding the application.  
 Choose "Cancel" to return to the home screen.

**Your Selected Applications**

**Additional Applications**

Central Business Registry  
 ORESTAR (Elections Reporting)  
 Public Records System

- 5 Select ORESTAR (Elections Reporting) in the Additional Applications box and click on **Submit**.
- 6 The Committee Filter page displays.

**Oregon Secretary of State Kate Brown**

Welcome scottbrown to Oregon Secretary of State Secure Access System Apr 4, 2011 2:38 PM

**Home**  
[My Profile](#)  
[Change Password](#)  
[Application Mgmt](#)  
[FAQs](#)  
[Contact us](#)  
[Privacy Policy](#)  
[Sign Out](#)

**Please select from the following filters (if applicable) and then click Submit.**

**Alphabetical by Committee Name**  
 Committee Number, Committee Name

If you are the treasurer or candidate for an existing committee, including a work in progress committee, select your committee & click submit. Otherwise, click submit without making a committee selection & you will be directed to the ORESTAR application.

013202, ZAZ-Committee 07/01/08 11:32:52  
 013204, ZAZ-Committee 07/01/08 13:33:13  
 013206, ZAZ-Committee 07/02/08 08:09:32  
 013207, ZAZ-Committee 07/02/08 09:02:39  
 013208, ZAZ-Committee 07/02/08 11:25:27  
 013209, ZAZ-Committee 07/02/08 13:12:49  
 013217, ZAZ-Committee 07/02/08 15:52:55  
 006462, ZZZ-Committee 05/29/08 15:09:26  
 006471, ZZZ-Committee 06/12/08 09:57:08  
 013196, ZZZ-Committee 07/01/08 09:54:21  
 013197, ZZZ-Committee 07/01/08 10:13:30  
 013198, ZZZ-Committee 07/01/08 10:28:37  
 013199, ZZZ-Committee 07/01/08 10:43:00  
 013713, ZZZ-Friday Committee Five  
 013734, ZZZ-Friday Committee Five  
 013766, ZZZ-Friday Committee Five  
 013781, ZZZ-Friday Committee Five  
 006499, ZZZ-Friday Committee Five  
 013245, ZZZ-Friday Committee Five  
 013256, ZZZ-Friday Committee Five

- 7 A user requesting access to an existing committee in ORESTAR or a work in progress committee should select the committee from the list by clicking on the committee name. Committees appear in alphabetical order by committee name. A candidate committee may appear in alphabetical order by the candidate's last name (e.g., Smith, John) or by the committee's official name (e.g., Friends of John Smith).  
To select multiple committees, hold down the control key on the keyboard while selecting each committee.

**If the committee's original Statement of Organization was not filed electronically using ORESTAR**, you must contact the Elections Division during business hours to establish ORESTAR access to the committee.

**note**

A user who is not associated with an existing or work in progress committee should not make a committee selection. This includes a user who is preparing to file a brand new committee or a candidate preparing to file a Declaration of Candidacy and does not currently have a candidate committee.

- 8 Click on **Submit**.

The screenshot shows the Oregon Secretary of State Secure Access System interface. The header features the text "Oregon Secretary of State Kate Brown" and the state seal. Below the header, a blue bar contains the text "Welcome scottbrown to Oregon Secretary of State Secure Access System" and the date "Apr 4, 2011 2:41 PM". The main content area is divided into two columns. The left column contains a navigation menu with links: Home, My Profile, Change Password, Application Mgmt, FAQs, Contact us, Privacy Policy, and Sign Out. The right column is titled "Applications" and contains a link for "ORESTAR (Elections Reporting)". Below the link, a red message states: "Application 'ORESTAR (Elections Reporting)' successfully added. Thank you for registering with the Oregon Secretary of State Secure Access System." The footer contains the text "© 2010, State of Oregon, 255 Capitol St. NE, Salem, OR 97301" and "[qa - ver 1.1]".

A user who requested access to a committee must receive approval before gaining access in ORESTAR. See **Granting Access to a Committee's Account** on page 27.

### Filing a Statement of Organization or Declaration of Candidacy

A user who did not make a committee selection and instead is preparing to register a new committee or file a Declaration of Candidacy can immediately log in as described on page 20 to access the Private Workshop. To register a new committee, see page 45. To file for candidacy for a state office, US Senator or Representative in Congress, see the ORESTAR Candidacy Filing manual.

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## Paper Statement of Organization

**If the committee filed its Statement of Organization by paper, you must contact the Elections Division during business hours to establish ORESTAR access to the committee.**

The Elections Division must approve initial access to the candidate or treasurer of a committee whose original Statement of Organization is not filed electronically using ORESTAR. Once the candidate or treasurer is granted access to a committee, the user can approve requests for access to the committee's account by other users. (See **Granting Access to a Committee's Account**, page 27.) The user is sent an email when access is granted.

## Logging In to ORESTAR

To log in to ORESTAR, go to [www.oregonvotes.org](http://www.oregonvotes.org) and click on **Login** under the ORESTAR logo. Enter your 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 on page 16.

A successful login from [www.oregonvotes.org](http://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 in the user management portion of the system. To access the Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the page.

For more information on the Private Workshop, see the chapter beginning on page 34.

### **note**

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

## Requesting Access to a Committee When Logged In to ORESTAR

A user who has completed the registration process and either did not request access to the appropriate committee or wants to request access to an additional committee should proceed as follows:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and **ORESTAR (Elections Reporting)** is in the Applications list.
- 2 Click on **Application Mgmt** in the left navigation bar.
- 3 The ORESTAR (Elections Reporting) application should display in the **Your Selected Applications** box. Click on ORESTAR (Elections Reporting) and then click **Submit**.
- 4 Select the desired committee from the list by clicking on the committee name.
- 5 Click on **Submit**. The Home page redisplay.

### **Remember!**

- ✓ Unless you are the user who registered the committee, an authorized person will need to approve your access to the committee. A candidate, treasurer, candidate/treasurer, or chief petitioner must log in to ORESTAR to assign you a role and approve it.
  - ✓ For more information, see **Granting Access to a Committee's Account** on page 27.
- 6 To return to your Private Workshop, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Updating Profile Information

When any information in the user's account profile changes, the user should update the profile information.

### **Remember!**

- ✓ User name **cannot** be changed.
- ✓ ORESTAR uses the email address on a user's profile to communicate with the user. In addition, system-generated reports (e.g., xml validation reports, transaction filing reports, and exam letters) are also sent to the email addresses on the committee's Statement of Organization.

To update user profile information, proceed as follows:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and ORESTAR (Elections Reporting) is in the Applications list.
- 2 Click on **My Profile** in the left navigation bar.
- 3 Make the desired changes. The form will allow edits on all account information, except the user name and password.
- 4 Click on **Submit** to save the changes.
- 5 The Home page redisplay.

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Changing Passwords

A user may voluntarily change the password at any time. To change the password, proceed with the following:

- 1 Log in to ORESTAR. The Home page of the Secure Access System displays and ORESTAR (Elections Reporting) is in the Applications list.

- Click on **Change Password** in the left navigation bar. The Change Password page displays.

**Oregon Secretary of State Kate Brown**

Welcome scottbrown to Oregon Secretary of State Secure Access System Apr 4, 2011 4:13 PM

**Change Password for scottbrown**

Old Password

New Password

Confirm Password

Key your new password, confirm it to make sure you keyed it as you intended, and then click Submit.

Case sensitive. Eight characters minimum with at least one numeric digit.

© 2010, State of Oregon, 255 Capitol St. NE, Salem, OR 97301 [qa - ver 1.1]

- Enter your current password as the 'Old Password'. Enter the new password and confirm it by entering it a second time. The password must be a minimum of eight characters and include at least one numeric digit. The password field is case sensitive so be sure to type in upper and lowercase as desired.
- Click on **OK** to save the new password. A message displays indicating that the password change was successful. An email is sent as notification of the password reset.

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Replacing a Forgotten Password

If you have forgotten your password and you have a current email address on your account profile, you can obtain a new password as follows:

- On the Login page, click on **Forgot Password** in the left sidebar.

**Oregon Secretary of State Kate Brown**

Oregon Secretary of State Secure Access System May 9, 2011 9:51 AM

**Forgot Password**

User Name

Enter your username and click Submit. A temporary password will be sent via email.

If you changed your email address or cannot remember your username (remember it's case sensitive) you must contact the appropriate division using the ' Contact Us ' link.

- 2 Enter the user name.
- 3 Click on **Submit**.
- 4 The Login page redisplay with a message notifying you that an email has been sent.

An email is sent to the user with a system-generated password that may be used for logging in to the system. After logging in with the system-generated password, it is recommended that the password be changed to one of the user's choice. See **Changing Passwords** on page 21.

If the password is forgotten and the email address on the user's account profile is **not** current, the user should contact the Elections Division for assistance.

### Retrieving a Forgotten User Name

If you have forgotten your user name and you have a current email address on your account profile, ORESTAR can send you an email listing all unexpired user names associated with that email address.

- 1 On the Login page, click on **Forgot User Name** in the left sidebar.

- 2 Enter the email address that is on your account profile.
- 3 Click on **Submit**.
- 4 The Login page redisplay with a message notifying you that an email containing your user name has been sent.

**note**

If the user name is forgotten but the email address on file is not your current address, the user must contact the Elections Division for assistance.

### Locked Account

After an unspecified number of unsuccessful login attempts, the user's account is locked.

- 1 Go to [www.oregonvotes.org](http://www.oregonvotes.org) and click on **Login** under the ORESTAR logo.

- 2 Click on **Forgot Password** in the left sidebar on the Login page.
- 3 Follow the instructions above for **Replacing a Forgotten Password**, page 22. The account will be unlocked and a new password will be sent to the user.

### **ORESTAR Login Troubleshooting**

If a user has difficulty accessing the Private Workshop page, it may be related to a security feature of ORESTAR, which is designed to protect an unauthorized user from accessing your account. If you are having trouble logging in, close all browser tabs and windows, then open a new browser and try again.

You may also experience trouble logging in if your browser does not accept cookies or if internet security settings are restricting website access. See **System Information**, page 9, for more information.

### **Multiple Registered Users on a Computer**

The committee's approved users may use a single computer to access ORESTAR.

When finished with an ORESTAR session, each user should:

- ✓ Sign out of ORESTAR.
- ✓ Close the web browser.

A different user can now successfully log in to ORESTAR.



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# Managing Access to a Committee's Account

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This section discusses the roles assigned to users in ORESTAR and guides a candidate, treasurer or chief petitioner through the process of granting additional users access to a committee's account, denying a request for access, changing a user's role, and expiring a user's role.

## User Roles

Each user in the system is assigned one of the following roles for each committee the user has access to. A single user can have access to multiple committees and be assigned a different role with each committee. The user's role determines the actions the user is allowed or is required to perform for the committee.

The available roles are:

- **Candidate:** This is the role assigned to a candidate associated with a candidate committee, if the candidate is not also serving as the committee's treasurer.
- **Treasurer:** This is the role assigned to the treasurer of a political action committee, petition committee or candidate committee, if the candidate is not also serving as the committee's treasurer.
- **Candidate/Treasurer:** This is the role assigned to a candidate associated with a candidate committee when the candidate is also serving as the committee's treasurer.
- **Alternate Transaction Filer:** This is the role assigned to an individual authorized to file campaign finance transactions for the committee, in addition to the candidate and treasurer. A user with this role is not allowed to file a Certificate of Limited Contributions and Expenditures or change system preferences.
- **Data Entry:** This is the role assigned to an individual authorized to data enter campaign finance transaction information. A user with this role is not allowed to file transactions.
- **Vendor:** This is the role assigned to an individual authorized to upload an XML file containing campaign finance transaction information. A user with this role is not allowed to add, edit, delete or file transactions.
- **Chief Petitioner:** This is the role assigned to an individual who is the chief petitioner of the initiative, referendum or recall petition sponsored by the petition committee. A chief cannot file campaign finance transactions on behalf of the committee.

A chief petitioner who is also the treasurer is assigned the Treasurer role. A chief petitioner who is also the alternate transaction filer is assigned the Alternate Transaction Filer role.

- **Former Treasurer:** This is the role assigned to a treasurer when an amended Statement of Organization designating a new treasurer is filed with and approved by the Elections Division. The assignment of this role is performed by ORESTAR. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to campaign finance ends the day after the last exam letter response date for transactions the user filed.

## Granting Access to a Committee's Account

An individual with the Candidate, Treasurer, Candidate/Treasurer or Chief Petitioner role for a committee may authorize access to the committee's account by other individuals. It is recommended that access to a committee's account be limited. Access must be granted in the following situations:

- the filing of a new candidate committee with a separate candidate and treasurer (either the candidate or treasurer begins the filing of the committee and the other user must be granted access to the committee to complete the filing)
- the filing of a new petition committee that is started by a chief petitioner (the chief petitioner must grant the treasurer access to the committee to complete the filing)
- a change in committee treasurers (the candidate, chief petitioner or current treasurer must grant access to the new treasurer)
- a committee wishes to have an alternate transaction filer
- a committee wishes to have a data entry person who can add, edit and delete campaign finance transaction information in the committee's account
- a committee needs a vendor who can upload an XML file containing transaction information into the committee's account

### **Remember!**

- ✓ The individual to be granted access must first create a user account, if the user does not already have one. See **Creating a User Account** on page 15.
- ✓ If the user has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.

To grant access to another individual, the candidate, treasurer, candidate/treasurer or chief petitioner should proceed as follows:

- 1 Log in to ORESTAR.
- 2 Click on **User Workflow** in the left navigation bar of the Home page of the Secure Access System. The individual requesting access displays in the User Workflow for ORESTAR (Elections Reporting).

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:52 PM

- Home
- My Profile
- Change Password
- Application Mgmt
- User Workflow
- User Admin
- FAQs
- Contact us
- Privacy Policy
- Sign Out

**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Doe, Jane</a>	<a href="#">janedoe</a>	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Smith, John</a>	<a href="#">johnsmith</a>	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Click in the checkbox in the Assign Roles column. A page displays with the available roles.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:54 PM

- Home
- My Profile
- Change Password
- Application Mgmt
- User Workflow
- User Admin
- FAQs
- Contact us
- Privacy Policy
- Sign Out

**ORESTAR (Elections Reporting)**

Select a role and Submit

**Available Roles**

- Data Entry
- Candidate
- Treasurer
- Vendor
- Chief Petitioner
- Alternate Transaction Filer

4 Select the role to be assigned to the individual and click on **Submit**.

- 5 The User Workflow page redisplay, with a message confirming that the role was granted.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 2:56 PM

Home  
My Profile  
Change Password  
Application Mgmt  
User Workflow  
User Admin  
FAQs  
Contact us  
Privacy Policy  
Sign Out

Role "Alternate Transaction Filer" granted to "janedoe".  
**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Doe_Jane</a>	janedoe	SBCanCmte	Alternate Transaction...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Smith_John</a>	johnsmith	SBCanCmte		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 6 The Assign Roles checkbox is checked and the role assigned to the individual displays in the Role column.
- 7 Click in the checkbox in the Approve column if the information is correct. A message displays confirming that the approval has been processed and an email has been sent to the individual receiving the new role.

**Oregon Secretary of State Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 3:03 PM

Home  
My Profile  
Change Password  
Application Mgmt  
User Workflow  
User Admin  
FAQs  
Contact us  
Privacy Policy  
Sign Out

Role "Alternate Transaction Filer" approved for "janedoe"  
Approval email sent to "stacey.brown@state.or.us".  
**User Workflow**

1. Click on the unchecked box in the "Assign Roles" column next to a user name to assign a role to this user. Please note; after a role is assigned, the box is checked.
2. After assigning a role, click on the unchecked box in the "Approve" column next to a user name to approve this role for use. Once approved this user will be automatically moved to the User Admin list at the bottom of the page.
3. If you wish to deny a user access to this application, click on the unchecked box in the "Deny" column. After you deny a user they will no longer show in this list.

**User Workflow for ORESTAR (Elections Reporting)**

Name	UserName	Filter	Role	Approve	Deny	Assign Roles
<a href="#">Smith_John</a>	johnsmith	SBCanCmte		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 8 Click on **User Admin**. The user's name displays in the User Administration page as an approved user.

**Oregon**  
**Secretary of State**  
**Kate Brown**

Welcome SBCan01QA to Oregon Secretary of State Secure Access System Apr 5, 2011 3:13 PM

[Home](#)

[My Profile](#)

[Change Password](#)

[Application Mgmt](#)

[User Workflow](#)

[User Admin](#)

[FAQs](#)

[Contact us](#)

[Privacy Policy](#)

[Sign Out](#)

**User Administration**

Click on the unchecked box in the "Expire Role" column if you wish to expire a user's access to an application.  
Click on a name to see the user profile.  
Search is confined to users you have authority to see.  
Use:  
1. Full or part of First Name, Last Name, or User Name  
2. Full or part of Filter Name  
Leave the search field blank to see all names.

User Search based on Name:    Show Default Filters  Show Expired Roles

Name	User Name	Appl	Filter	Role	Expire Role	Effective Date	Expire Date	Status	Locked User
<a href="#">Alexander, Thomas</a>	<a href="#">SBCan01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Candidate/Treasurer	<input type="checkbox"/>	11/09/2010		Approved	
<a href="#">Doe, Jane</a>	<a href="#">janedoe</a>	ORESTAR (Elections Reporting)	SBCanCmte	<a href="#">Alternate Transaction...</a>	<input type="checkbox"/>	04/05/2011		Approved	
<a href="#">Harvey, Gloria</a>	<a href="#">SBTre01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Treasurer	<input checked="" type="checkbox"/>	11/09/2010	03/03/2011	Approved	
<a href="#">Harvey, Gloria</a>	<a href="#">SBTre01QA</a>	ORESTAR (Elections Reporting)	SBCanCmte	Former Treasurer	<input type="checkbox"/>	03/03/2011		Approved	
<a href="#">Smith, John</a>	<a href="#">johnsmith</a>	ORESTAR (Elections Reporting)	SBCanCmte		<input type="checkbox"/>	04/04/2011		Pending	

Total records displayed = 5

## Denying a Request for Access to a Committee's Account

To deny a user's request for access, open the User Workflow page and click in the checkbox in the Deny column for the user.

## Returning to the Private Workshop

To return to your Private Workshop page, click on **ORESTAR (Elections Reporting)** in the Applications section of the Home page.

## Changing a User's Role

A Candidate, Treasurer, Candidate/Treasurer or Chief Petitioner can change the role of an approved user associated with the committee. The following are some scenarios in which a user's role should be changed:

- an individual with the Data Entry or Vendor role who becomes the committee's alternate transaction filer should be assigned the Alternate Transaction Filer role.
- an individual with the Candidate/Treasurer role who appoints a separate treasurer should be assigned the Candidate role. See **Removing Candidate as the Treasurer**, page 64, for the process on making this change.

→ an individual with the Candidate role who becomes the committee's treasurer should be assigned the Candidate/Treasurer role. See page 65.

To change a user's role, proceed with the following:

- 1 Log in to ORESTAR.
- 2 Click on **User Admin** in the left navigation bar to enter the user administration portion of the system. Users with access to the committee's account appear on the User Administration page.
- 3 Click on the dropdown arrow in the Status column associated with the user and choose 'Pending' from the list.
- 4 Click on **User Workflow** in the left navigation bar. The user with the 'Pending' status will appear in User Workflow for ORESTAR (Elections Reporting).
- 5 Click in the checkbox that contains a checkmark in the Assign Roles column for the user. A page displays with the available roles.
- 6 Select the new role to be assigned to the user and click on **Submit**.
- 7 The User Workflow page redisplay, with a message confirming that the role was granted.
- 8 The Assign Roles checkbox is checked and the role assigned to the individual displays in the Role column.
- 9 Click in the checkbox in the Approve column if the information is correct. A message displays confirming that the approval has been processed and an email has been sent to the individual receiving the new role.

## Expiring a User's Role

The role of a user who should no longer have access to a committee's account should be expired. To expire an approved user's role, proceed with the following:

- 1 Log in to ORESTAR.
- 2 Click on **User Admin** in the left navigation bar to enter the user administration portion of the system. Users with access to the committee's account appear on the User Administration page.
- 3 Click in the checkbox in the Expire Role column for the user to be expired.

### **note**

If a role is expired in error, click the Expire Role checkmark to remove the check and "unexpire" the role.





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# Private Workshop

---

A successful login from [www.oregonvotes.org](http://www.oregonvotes.org) typically takes a user to the Home page of the Secure Access 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.

The screenshot shows the Oregon Secretary of State's Private Workshop interface for user Kate Brown. The header includes the user's name, the date (August 5, 2011), and the version (v3.5.10). The left navigation menu includes options like Private Workshop, Public Search, My Vote, Submit New Filing, User Management, Sign out, Elections Home, Elections History, Initiative, Referendum & Referral, and Publications and Forms. The main content area displays a table of Active Committees with columns for Committee Name, ID, and actions like Amend, Discontinue, and Campaign Finance.

Committee Name	ID			
▶ Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
▶ ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
▶ ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

Legend: ▶ Active, ▶ Pending Approval, ▶ Pending Insufficient, ▶ Discontinued, ▶ Rejected, ▶ Work In Progress

## Navigation and Private Workshop Pages

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 campaign finance 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. See the ORESTAR Candidacy Filing manual for more information.
  - 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.

## Active Committees Page

Each active committee the user has access to appears in the list and the appropriate function buttons display based on the user's role. The user's role with the committee displays in parentheses after the committee name.

The committees display in ascending order by committee name or by candidate's last name, in the case of a candidate committee. Clicking once on the red arrow will reverse the sort order. Committees can also be sorted in committee ID number order by clicking on the arrow in the ID column.



Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 5, 2011 (Version : v3.5.10)

Private Workshop

Public Search >>

My Vote

Submit New Filing >>

User Management

Sign out

Elections Home

Elections History

Initiative, Referendum & Referral

Publications and Forms

File New Political Committee

**Active Committees**

Committee Name	ID	Amend	Discontinue	Campaign Finance
Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

**Legend**

Active Pending Approval Pending Insufficient Discontinued Rejected Work In Progress

To view the committee's most recent Statement of Organization filed with the Elections Division, click on the committee name.

### Function Buttons

For each committee 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 displays for candidates, treasurers and chief petitioners and allows the user to amend Statement of Organization information. For a newly filed committee, the Amend button does not display until the committee's original Statement of Organization is approved by the Elections Division. The Amend button will also display if the original Statement of Organization was filed and determined to be insufficient.
- **Continue with Filing:** This button displays for candidates, treasurers and chief petitioners and allows the user to continue with a work in progress Statement of Organization filing. The Continue with Filing button replaces the Amend button when there is a work in progress Statement of Organization.
- **Discontinue:** This button displays for candidates, treasurers and chief petitioners and allows the user to discontinue a committee. For a newly filed committee, the Discontinue button does not display until the committee's original Statement of Organization is approved by the Elections Division. The Discontinue button will also not display if the committee has a pending Notice of Intent to Discontinue.
- **Delete:** This button displays for candidates, treasurers and chief petitioners and allows the user to delete a work in progress Statement of Organization. The Delete button replaces the Discontinue button when there is a work in progress Statement of Organization.
- **Campaign Finance:** This button displays for candidates, treasurers, alternate transaction filers, data entry persons and vendors. It takes the user to the campaign finance portion of the system where transactions are managed. For a newly filed committee, the Campaign Finance button does not display until the committee's original Statement of Organization is approved by the Elections Division. For a newly appointed treasurer or alternate transaction filer, the Campaign Finance button does not display until an amended Statement of Organization appointing the treasurer or alternate transaction filer is filed with and approved by the Elections Division.

## Legend

Each committee has an arrow to the left of the committee name identifying the committee's status or the status of the committee's most recent Statement of Organization filing. The statuses are:

- **Active (green):** Indicates that the committee is open (not discontinued) and does not have a pending or work in progress Statement of Organization.
- **Pending Approval (yellow):** Indicates that the committee has filed a new or amended Statement of Organization that is pending approval by the Elections Division, or a Discontinuation of a Statement of Organization is pending.
- **Pending Insufficient (orange):** Indicates that the committee has filed a new or amended Statement of Organization that is missing an item of required information or an item of information on the filing is not adequate.
- **Discontinued (black):** Indicates that the committee is discontinued.
- **Rejected (red):** Indicates that the Elections Division has rejected the committee's most recent Statement of Organization filing. If an original Statement of Organization is rejected, it is generally because the committee did not qualify as a political committee under ORS chapter 260. An original Statement of Organization that is rejected cannot be modified. An amended Statement of Organization that is rejected may be subsequently amended.
- **Work in Progress (blue):** Indicates that the committee has started a Statement of Organization filing that has not yet been filed with the Elections Division.

## Discontinued Committees Page

Each discontinued committee the user has access to appears in the list and the **Campaign Finance** button displays. The user's role with the committee displays in parentheses after the committee name.

Committees display in ascending order by committee name or by candidate's last name, in the case of a candidate committee. Clicking once on the red arrow will reverse the sort order. Committees can also be sorted in committee ID number order by clicking on the arrow in the ID column.

## Candidacy Filings Page

This Private Workshop page is used exclusively by major political party or nonpartisan candidates for state office, or candidates for US Senator or Representative in Congress. Each candidacy filing the user has filed appears on the list and the appropriate function buttons display. For more information, see the ORESTAR Candidacy Filing manual.

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 applicable 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.

### Voters' Pamphlet Filings Page

The Voters' Pamphlet Filings page in the user's Private Workshop is used for submitting Candidate Statements, Measure Arguments, Fiscal Impact Statements, Explanatory Statements, Citizens' Review Statements, Precinct Committeeperson Statements (primary election only), and Political Party / Assembly of Electors Statements (general election only). The Voters' Pamphlet Filings page lists each Voters' Pamphlet filing filed and appropriate function buttons display. For more information, see the ORESTAR Voters' Pamphlet Filing manual.

The function buttons display only if the action can be performed. For example, a Voters' Pamphlet filing can be amended until 5pm on the Voters' Pamphlet filing deadline. After the filing deadline, the Amend button is no longer available.

See the Elections Division publications and forms for information about filing fees and deadlines associated with filing Voters' Pamphlet statements or arguments, including amending or withdrawing a Voters' Pamphlet filing.

## Function Buttons

For each Voters' Pamphlet 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 user to amend a Voters' Pamphlet filing.
- **Continue with Filing:** This button allows the user to continue with a work in progress Voters' Pamphlet filing. The Continue with Filing button replaces the Amend button when there is a work in progress Voters' Pamphlet filing.
- **Withdraw:** This button allows the user to withdraw a Voters' Pamphlet filing.
- **Delete:** This button allows the user to delete a work in progress Voters' Pamphlet filing. The Delete button replaces the Withdraw button when there is a work in progress Voters' Pamphlet filing.

## Legend

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

- **Pending Approval (yellow):** Used for Voters' Pamphlet petition filings only. Indicates that the user has filed a Voters' Pamphlet filing with the Elections Division but a determination has not been made as to whether the petition is approved to circulate.
- **Approved to Circulate (orange):** Used for Voters' Pamphlet petition filings only. Indicates that the Elections Division has reviewed the petition and approved it to be circulated to gather signatures.
- **Approved (green):** Indicates that the Voters' Pamphlet filing is complete and was filed before the Voters' Pamphlet filing deadline. Note that before a petition filing can be approved, signatures must be verified by the appropriate elections official (i.e., the Secretary of State for candidates for state office, or the appropriate county elections official for candidates for local office). If a county is verifying the signatures, the Voters' Pamphlet filing will not receive a status of Approved until verified signature sheets with sufficient signatures are turned in to the state Elections Division.
- **Work in Progress (blue):** Indicates that the user has started a Voters' Pamphlet filing that has not yet been filed with the Elections Division.
- **Withdrawn (black):** Indicates that the user had filed a Voters' Pamphlet filing, but has chosen to withdraw the filing.

## Election Activity Log

The following information regarding election activity applies to candidate committees and political action committees only. This information is not applicable to chief petitioner committees.

The Election Activity Log displays the history of a committee's election activity. The log for a committee can be accessed from the Private Workshop. In Private Workshop, click on the committee name to view the committee's current Statement of Organization and then click on the **Election Activity Log** link at the bottom of the page. The Election Activity Log page opens.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
 255 Capitol St NE, Ste 501, Salem, OR 97310  
 503.986.1518 or 1.866.ORE.VOTE  
  
 February 23, 2012 (Version: v3.6.1)

Private Workshop >>	<b>Election Activity Log</b>				
Public Search >>	<b>Election</b>	<b>Active Date</b>	<b>Status</b>	<b>Active Reason</b>	
My Vote	2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>
Election Results	2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>
Submit New Filing >>					
User Management					
Sign out					

The log identifies the election, active date, status and active reason.

### Activating a Committee for an Election

A committee is activated for an election in the following ways:

#### Statement of Organization Filing for a Candidate Committee

When a Statement of Organization for Candidate Committee is filed, the committee is activated for the election in which the candidate will run for office. Additionally, if the Statement of Organization identifies that the candidate is participating in an election other than one in which the candidate's name will appear on the ballot, the committee is activated for that election. The active date is the date the Statement of Organization is filed and the active reason is "Statement of Organization."

#### Statement of Organization Filing for a Political Action Committee

When a Statement of Organization for Political Action Committee is filed and it identifies that the committee will support or oppose a measure or recall at an election, the committee is activated for that election. The active date is the date the Statement of Organization is filed and active reason is "Statement of Organization."

#### User Requested Activation

If a candidate or treasurer inactivates itself and subsequently becomes active, the candidate or treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link. The active date is the date the user activates the committee and the active reason is "User Requested Activation."



**System Activation for a Primary or General Election**

It is assumed that all candidate committees and political action committees are active for each primary and general election (May and November elections held in even-numbered years). An automated process in ORESTAR is run by the Elections Division approximately three months prior to a primary or general election. The process automatically activates any candidate committee or political action committee not already activated. The active date is the date the process is run and the active reason is "System Generated / Primary or General Election." Any new committee filed after the process is run through election day is also automatically activated for that election.

**System Activation Based on Campaign Finance Transactions**

The entry of a transaction associated with an active candidate or measure committee will result in the committee being activated for the applicable election. The active date is the date of the transaction and the active reason is "Contribution to Active Candidate or Measure Committee."

See the Campaign Finance Manual for more information on what it means to be active in an election, including a list of transactions that result in a committee being activated for an election.

**Inactivating a Committee for a Election**

For instructions on how to inactivate a committee, see **Inactivating a Committee for an Election** for a:

Candidate Committee (page 66), or  
Political Action Committee (page 85).



---

# Statement of Organization: *Getting Started*

---

This section guides a user through the process of registering a new committee. Filing a Statement of Organization, amending a committee's Statement of Organization, and discontinuing a committee using ORESTAR are detailed in subsequent sections specific to committee type: Candidate Committee, Political Action Committee, or Petition Committee.

Candidates and treasurers may file Statements of Organization. Signatures on Statements of Organization filed using ORESTAR are executed electronically. For a candidate committee with a treasurer who is not the candidate, both the candidate and treasurer must electronically sign all Statement of Organization filings. See page 63 for information about filing a Statement of Organization for Candidate Committee that requires multiple signatures. For a petition committee, a chief petitioner may complete the Statement of Organization and submit the filing but the treasurer must also attest to complete the filing. See page 99 for information about filing a Statement of Organization for Petition Committee that requires multiple signatures.

All Statement of Organization filings are reviewed by the Elections Division. The treasurer and candidate, if applicable, will receive notice via email when a filing is approved.

All information on a filed Statement of Organization is public record and viewable by the public on the Internet, except campaign account information and personal information (residence address, home phone number and personal email address) of an individual who has been granted a public disclosure exemption under ORS 192.445.

***Warning!***

When entering data in ORESTAR, do not use your browser's Back button. You may lose the information you have entered.

## Registering a New Committee

Registration of a new committee must be done by the candidate, treasurer or chief petitioner. Only one user associated with a committee starts the registration process for a committee. A user who registers a new committee using ORESTAR is automatically assigned the appropriate role and is approved, and can immediately authorize access to other users, if needed.

To register a new committee, proceed with the following:

- 1 In the left menu bar, click on **Submit New Filing** >> and File New Political Committee. Alternatively, use the File New Political Committee link in the upper right of the Active Committees page.

The screenshot shows the ORESTAR interface for selecting a committee type. The header identifies the Oregon Secretary of State as Kate Brown and provides contact information for the Elections Division. The left sidebar lists various navigation options, with 'Submit New Filing' expanded to show 'File New Political Committee'. The main content area is titled 'Select Type of Committee' and 'Committee Type Information'. It includes a 'Next' button and three radio button options for committee types: 'Candidate Committee', 'Petition Committee', and 'Political Action Committee'. Each option includes a brief description and radio buttons to select the user's role: 'Candidate', 'Treasurer', or 'Both Candidate & Treasurer' for the Candidate Committee; 'Chief Petitioner', 'Treasurer', or 'Both Chief Petitioner & Treasurer' for the Petition Committee; and 'Both Candidate & Treasurer' for the Political Action Committee.

- 2 Select the type of committee to be created. If Candidate Committee or Petition Committee is selected, identify the appropriate role.

For a **Candidate Committee**, select:

- Candidate, if the user registering the committee is the candidate and is appointing a treasurer.
- Treasurer, if the user registering the committee is the appointed treasurer for the committee.
- Both Candidate & Treasurer, if the user registering the committee is the candidate and is also serving as the committee's treasurer.

For a **Petition Committee**, select:

- Chief Petitioner, if the user registering the committee is a chief petitioner and is appointing a treasurer.
- Treasurer, if the user registering the committee is the appointed treasurer for the committee.

- Both Chief Petitioner & Treasurer, if the user registering the committee is a chief petitioner and is also serving as the committee's treasurer.
- 3 Click on **Next**. For candidate committees, continue on page 48. For political action committees, continue on page 70. For petition committees, continue on page 90.

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# Candidate Committee

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## Entering a Statement of Organization

Complete the steps for selecting the committee type “Candidate Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Candidate Committee** (form SEL 220), which includes **Campaign Account Information** (form SEL 223).

### **Remember!**

A candidate can have only one candidate committee. Amend your existing candidate committee information if the candidate runs for another office.

### Data Entry Instructions

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 Statement of Organization 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 for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

### Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a candidate committee.

The screenshot displays the Oregon Secretary of State's website interface for entering a Statement of Organization for a Candidate Committee. The header identifies the Secretary as Kate Brown and provides contact information for the Elections Division. The main content area is titled "Statement of Organization for Candidate Committee" and features a tabbed navigation system. The "Committee" tab is selected, leading to the "Committee Information" form. This form includes a "Next" button, a "Save as work in progress" button, and a "Submit Filing" button. Below these buttons are radio buttons for "Original", "Amendment", and "Discontinuation". The form fields include: "Name of Committee", "Committee Address and Campaign Phone" (with sub-fields for Street Address, City, State, Zip Code, and Extension), and "Campaign Phone". A sidebar on the left contains navigation links such as "Private Workshop", "Public Search", "My Vote", "Submit New Filing", "File New Political Committee", "File Candidacy", "User Management", "Sign out", "Elections Home", "Elections History", "Initiative, Referendum & Referral", and "Publications and Forms".



1 Enter the following information about the committee:

→ **Name of Committee:** The official name of the committee.

→ **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.

→ **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons that are associated with the committee, including the candidate, treasurer, committee directors, alternate transaction filer and correspondence recipient.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 18, 2011 (Version : v3.5.11.QA)

Statement of Organization for Candidate Committee

Committee **Persons** Election Campaign Account Multiple Directors Other Election Activity

Persons Associated with Committee

Back Next Save as work in progress Submit Filing

**Candidate**  
Name: John Smith Edit  
Address:  
Contacts:  
Occupation:

**Treasurer**  
Add Treasurer

**Committee Director**  
Add Committee Director

**Alternate Transaction Filer**  
Add Alternate Transaction Filer

**Correspondence Recipient**  
Add Correspondence Recipient

## Candidate Information

1 If the candidate or candidate/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the candidate. If the treasurer is entering the Statement of Organization, click on **Add Candidate**. The Add/Edit Candidate Information page displays.

Oregon Secretary of State

# Kate Brown

Elections Division  
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503.986.1518 or 1.866.ORE.VOTE

August 18, 2011 (Version : v3.5.11.QA)

---

Private Workshop >>

Public Search >>

My Vote

Submit New Filing >

File New Political Committee

File Candidacy (federal and state offices)

User Management

Sign out

---

Elections Home

Elections History

Initiative, Referendum & Referral

Publications and Forms

## Statement of Organization for Candidate Committee

### Add/Edit Candidate Information

**Name**

**Candidate Address**

Street Address:

City, State, Zip Code:    -

**Mailing Address**

Use Candidate Address

Street Address / PO Box:

City, State, Zip Code:    -

**Occupational Information**

Not Employed  Self-Employed

Occupation:

Employer's Name:

Employer's City / State:

**Contact Information**

Work Phone:  Ext:

Home Phone:

Fax:

Email:

This individual is also:

Campaign Account Signer

2 Enter the following information about the candidate. Name, candidate address, mailing address, email address and occupational information are required.

- **Name:** The candidate's name (first, middle, and last) is automatically populated from the user profile if the candidate or candidate/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) fields can be added if desired. If the treasurer is completing the Statement of Organization, enter the candidate's name.
- **Candidate Address:** The address of a residence, office, headquarters or similar location in Oregon where the candidate can conveniently be found. Do not use a post office box number.
- **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the candidate wishes to receive committee correspondence from the Elections Division. Click in the checkbox to use the candidate address as the mailing address for candidate correspondence.

**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 on the user's account profile and to email addresses on the committee's Statement of Organization.

→ **Occupational Information:**

If the candidate is not employed (including retired, student, etc.), select “Not Employed” by clicking in the box.

If the candidate is self-employed, select “Self-Employed” by clicking in the box, and provide the nature of the candidate’s occupation.

If the candidate is employed by another person, provide the candidate’s occupation and employer’s name and address (city and state).

→ **Contact Information:** The work phone, home phone, fax and email address for the candidate. The work number is the number where the candidate can be reached during normal business hours. An email address is required. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate’s user profile, if different.

→ **This individual is also:** A candidate must be a campaign account signer. Click in the Campaign Account Signer checkbox to confirm that the candidate is a signer on the committee’s campaign account.

3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the candidate’s information on an amended Statement of Organization, click on the **Edit** button associated with the candidate.

### ***Treasurer Information***

A candidate committee must have a complete treasurer entry before the Statement of Organization can be successfully submitted.

***note***

If a user with the candidate/treasurer role has successfully entered Candidate Information, the mailing address and contact information will automatically populate in Treasurer Information.

1 If the treasurer or candidate/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the treasurer. If the candidate is entering the Statement of Organization and is appointing a separate treasurer, click on **Add Treasurer**. The Add/Edit Treasurer Information page displays.

Oregon Secretary of State  
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Elections Division  
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Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
File New Political Committee  
File Candidacy (federal and state offices)  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

**Statement of Organization for Candidate Committee**

Add/Edit Treasurer Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:   
City, State, Zip Code:   -

Contact Information   
Work Phone:  Ext:   
Home Phone:   
Fax:   
Email:

This individual is also:

Committee Director  
 Campaign Account Signer

2 Enter the following information about the treasurer. Name, mailing address and email address are required.

→ **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile if the treasurer or candidate/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired. If the candidate is completing the Statement of Organization and is appointing a separate treasurer, enter the treasurer's name.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

**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 on the user's account profile and to email addresses on the committee's Statement of Organization.

→ **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the treasurer's user profile, if different.

→ **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes. A treasurer must be a campaign account signer. Click in the Campaign Account Signer checkbox to confirm that the treasurer is a signer on the committee's campaign account.

3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.

4 If the committee has committee directors, click on **Add Committee Director** and the Add/Edit Committee Director Information page displays.

### Committee Director Information

A committee director is, in part, any person who directly and substantially participates in decision-making on behalf of a political committee concerning the solicitation or expenditure of funds. If any individual meets the definition of director, that person must be designated as a director. A candidate committee is not required to have committee directors and the candidate should not be listed as a committee director.

If the treasurer is designated as a committee director (i.e., the Committee Director checkbox on the Add/Edit Treasurer Information page is checked), the treasurer's name, mailing address and contact information are automatically populated in the Committee Director section on the Persons Associated with Committee page. Click on the **Edit** button associated with the individual in the Committee Director section to add the required occupational information.

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August 18, 2011 (Version : v3.5.11.QA)

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing  
File New Political Committee  
File Candidacy (federal and state offices)  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Statement of Organization for Candidate Committee

Add/Edit Committee Director Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address   
Street Address / PO Box:   
  
City, State, Zip Code:   -

Occupational Information  Not Employed  Self-Employed  
Occupation:   
Employer's Name:   
Employer's City / State:

Contact Information  Work Phone:  Ext:

This individual is also:

Alternate Transaction Filer  
 Correspondence Recipient  
 Campaign Account Signer

1 Enter the following information about each committee director. Name, mailing address and occupational information are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The individual's street address or PO Box, city, state and zip code.

→ **Occupational Information:**

If the individual is not employed (including retired, student, etc.), select "Not Employed" by clicking in the box.

If the individual is self-employed, select "Self-Employed" by clicking in the box, and provide the nature of the individual's occupation.

If the individual is employed by another person, provide the individual's occupation and employer's name and address (city and state).

- **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

If the committee has another director, click on **Add Committee Director**.

To make further edits on an original filing or to update a committee director's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate committee director.

To remove a committee director on an amended Statement of Organization, click on the **Remove** button associated with the appropriate committee director.

- 3 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

#### ***Alternate Transaction Filer Information***

The alternate transaction filer is a person, in addition to the candidate and treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the candidate or treasurer as the alternate transaction filer.

If a committee director is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Committee Director Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

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**Statement of Organization for Candidate Committee**

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >  
File New Political Committee  
File Candidacy (federal and state offices)  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

**Add/Edit Alternate Transaction Filer Information**

Cancel Save

**Name**  Prefix  First  MI  Last  Suffix  Title

**Mailing Address**

Street Address / PO Box:

City, State, Zip Code:    -

**Contact Information**

Work Phone:  Ext:

Email:

**This individual is also:**

Committee Director  
 Correspondence Recipient  
 Campaign Account Signer

- Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.
- Click on **Save** to save the information entered and return to the Persons Associated with Committee page.
 

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.
- If the committee wishes to designate a correspondence recipient, click on **Add Correspondence Recipient** and the Add/Edit Correspondence Recipient Information page displays.

### **Correspondence Recipient Information**

The correspondence recipient is a person, in addition to the candidate or treasurer, designated to receive all notices sent by the Elections Division under ORS chapters 246 to 260. A committee may have only one correspondence recipient. Do not designate the candidate or treasurer as the correspondence recipient.

If a committee director or the alternate transaction filer is designated as the correspondence recipient (i.e., the Correspondence Recipient checkbox on the Add/Edit Committee Director Information page or the Add/Edit Alternate Transaction Filer Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Correspondence Recipient section. Click on the **Edit** button to add the required email address, if necessary.

The screenshot shows the Oregon Secretary of State's website interface. The header includes the name 'Kate Brown' and the Elections Division contact information: 'Elections Division, 255 Capitol St NE, Ste 501, Salem, OR 97310, 503.986.1518 or 1.866.ORE.VOTE'. The date is 'August 18, 2011' and the version is '(Version : v3.5.11.QA)'. The main content area is titled 'Statement of Organization for Candidate Committee' and contains the 'Add/Edit Correspondence Recipient Information' form. The form has a 'Cancel' and 'Save' button. The 'Name' section has fields for Prefix, First, MI, Last, Suffix, and Title. The 'Mailing Address' section has fields for Street Address / PO Box, City, State, and Zip Code. The 'Contact Information' section has fields for Work Phone, Ext., and Email. Below the form, there is a section titled 'This individual is also:' with three checkboxes: 'Committee Director', 'Alternate Transaction Filer', and 'Campaign Account Signer'. The left sidebar contains navigation links such as 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'File New Political Committee', 'File Candidacy (federal and state offices)', 'User Management', 'Sign out', 'Elections Home', 'Elections History', 'Initiative, Referendum & Referral', and 'Publications and Forms'.

1 Enter the following information about the correspondence recipient. Name, mailing address and email address are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the individual wishes to receive committee correspondence from the Elections Division.

**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 provided on the Statement of Organization. A correspondence recipient should not create a user account.

→ **Contact Information:** The work phone is the number where the correspondence recipient can be reached during normal business hours. The email address is where the individual wishes to receive committee correspondence from the Elections Division.

→ **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the correspondence recipient's information on an amended Statement of Organization, click on the **Edit** button associated with the correspondence recipient.



To remove the correspondence recipient on an amended Statement of Organization, click on the **Remove** button associated with the correspondence recipient.

- 3 Click on **Next**. The Election Information page displays.

## Election Tab

- 1 Enter the following information about the next election in which the candidate's name is expected to appear on the ballot. 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.
  - **Year:** Select the year the candidate intends to run for office.
  - **Type of Election:** Select the election the candidate intends to run for office.
  - **Office:** Select the office the candidate intends to run for. If the office cannot be found on the list, enter the complete name of the office, including district, position, county or city, and party affiliation for a partisan office, in the field directly following party affiliation. If the specific office the candidate will run for is not known at the time of filing the Statement of Organization, enter "Office Unknown."
  - **District, Position, County or City:** Select the district, position, county or city of the office the candidate intends to run for.
  - **Party Affiliation:** Select the candidate's party affiliation if the candidate is running for a partisan office. 'Nonpartisan' will automatically populate if the office selected is nonpartisan.
- 2 Click on **Next**. The Campaign Account Information page displays.

## Campaign Account Tab

The screenshot shows the Oregon Secretary of State's website interface. At the top, it displays "Oregon Secretary of State Kate Brown" and "Elections Division" contact information. The main heading is "Statement of Organization for Candidate Committee". Below this, there are tabs for "Committee", "Persons", "Election", "Campaign Account", "Multiple Directors", and "Other Election Activity". The "Campaign Account" tab is active, showing "Campaign Account Information". The form includes fields for "Name of Oregon Financial Institution", "Account Number", "Name of Account", and "Name of Account Holder". There are also buttons for "Back", "Next", "Save as work in progress", and "Submit Filing". A section titled "List the names of persons with signature authority for campaign account" contains a table with columns for Prefix, First, MI, Last, Suffix, and Title. Below the table is a button labeled "Additional persons with signature authority".

1 Enter the following information about the committee's campaign account:

→ **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.

→ **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

→ **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**

→ **Name of Account Holder:** The name of the account holder. For a candidate committee, the account holder must include the candidate or the name of the candidate committee. If the candidate is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. First and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired. The candidate and treasurer must be signers on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

2 Click on **Next**. The Multiple Director Information page displays.

## Multiple Directors Tab

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Candidate Committee

Committee Persons Election Campaign Account **Multiple Directors** Other Election Activity

Multiple Director Information

Back Next Save as work in progress Submit Filing

Committee ORESTAR User's Manual Committee

Enter the following information when two or more Directors are Directors of another Political Committee:

**Director/Committee**

Identify Committee

By Committee ID:  Find

By Committee Name:  Find

Found Committee Names:

Committee Selected

Name:

Street Address:

City, State, Zip Code:  Oregon  -

Select directors who are also directors of the committee identified above.

Remove this set of Director/Committee Information

If a candidate committee does not have committee directors or has only one committee director, skip this page. If two or more committee directors are also directors of another political committee, identify the other committee and the directors serving on both committees.

- 1 To identify the other committee, enter the committee's identification number in the By Committee ID field or enter any portion of the committee's name in the By Committee Name field and click on the corresponding Find button.
- 2 Select the committee by clicking on the down arrow and choosing the appropriate value from the Found Committee Names list. The committee's name and address display in the Committee Selected section of the page.
- 3 Select the committee directors who are also directors of the committee selected by clicking in the appropriate checkboxes.

If there are more than three sets of multiple director information, click on the **Additional Multiple Directors** button and more fields become available.

To remove a set of multiple director information on an amended Statement of Organization, click in the appropriate "Remove this set of Director/Committee Information" checkbox.

- 4 Click on **Next**. The Other Election Activity page displays.

## Other Election Activity Tab

Oregon Secretary of State

# Kate Brown

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Candidate Committee

Committee
Persons
Election
Campaign Account
Multiple Directors
Other Election Activity

Other Election Activity [?](#)

Back
Save as work in progress
Submit Filing

Committee : ORESTAR User's Manual Committee

**Election**

Year  Election Type

The committee supports or opposes multiple candidates and measures  
 The committee supports or opposes specific measures or recalls, identify the measures or recalls  
 Remove all election participation information.

**Measure**

Select Measure by Number   
 Support or Oppose

**Measure**

Select Measure by Number   
 Support or Oppose

**Measure**

Select Measure by Number   
 Support or Oppose

Additional Measures

**Recall**

Candidate  First Name :  Last Name :   
 Office of Recall Candidate   
 District/Position/County   
 Support or Oppose

**Recall**

Candidate  First Name :  Last Name :   
 Office of Recall Candidate   
 District/Position/County   
 Support or Oppose

**Recall**

Candidate  First Name :  Last Name :   
 Office of Recall Candidate   
 District/Position/County   
 Support or Oppose

Additional Recall Candidates

The Other Election Activity page is used to identify an election that a candidate committee will participate in, **other than** an election where the candidate's name appears on the ballot.

- 1 Identify the election in which the committee will participate.

→ **Year:** Select the year of the election by clicking on the down arrow and choosing the appropriate value from the list.

- **Election Type:** Select the election by clicking on the down arrow and choosing the appropriate value from the list.
  - **Nature of Activity:** Identify the nature of the committee's participation. Select either "The committee supports or opposes multiple candidates and measures" or "The committee supports or opposes specific measures or recalls" by clicking in the appropriate checkbox.
- 2 If the committee supports or opposes specific measures, identify the measures.
- **Measure by Number:** Select the number assigned to the measure supported or opposed by clicking on the down arrow and choosing the appropriate value from the list.
  - **Support or Oppose:** Indicate the committee's position on the measure by clicking on the down arrow and selecting Support or Oppose from the list.
- 3 If the committee supports or opposes specific recalls, identify the recalls.
- **Candidate First and Last Name:** Enter the recall candidate's first and last name.
  - **Office of Recall Candidate:** Select the office currently held by the candidate subject to the recall by clicking on the down arrow and choosing the appropriate value from the list.
  - **District/Position/County:** Select the district, position, county or city of the office the candidate currently holds by clicking on the down arrow and choosing the appropriate value from the list.
  - **Support or Oppose:** Indicate the committee's position on the recall by clicking on the down arrow and selecting Support or Oppose from the list. Support means the committee supports recalling the candidate and Oppose means the committee opposes recalling the candidate.

**note**

To remove other election activity on an amended Statement of Organization, click in the "Remove all election participation information" checkbox.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.

- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link.  
To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

If the committee has a separate candidate and treasurer, both individuals must electronically sign the Statement of Organization.

### **note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

## Filing a Statement of Organization that Requires Multiple Signatures

The following describes the process for filing a Statement of Organization for a new committee when multiple signatures are required. The candidate and the treasurer (if different) must both attest to the Statement of Organization filing.

- 1 Person A completes the Statement of Organization for the committee, including attesting to the filing. The Statement of Organization is assigned the Work In Progress status. **Person A can be either the candidate or treasurer.**
- 2 Person B creates a user account, if one does not already exist. See **Creating a User Account** on page 15.

- 3 Person B requests access to the work in progress committee started by Person A. See **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 4 Person A assigns the appropriate role to Person B and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27.
- 5 Person B accesses the Private Workshop page and clicks on the **Continue with Filing** button associated with the committee and then clicks on the **File** button to attest to the Statement of Organization filing.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The candidate or current treasurer assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.
- 3 The new treasurer, along with the candidate, files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the candidate or current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Removing Candidate as the Treasurer

If a candidate is currently serving as the treasurer, but now wants to appoint someone else as treasurer, follow the general steps outlined on page 64 for changing treasurers.

- 1 The new treasurer creates an ORESTAR user account (page 15), if one does not already exist.
- 2 The new treasurer requests access to the committee. See **Requesting Access to a Committee When Logged In to ORESTAR** on page 20 for more information.



- 3 The candidate logs in, enters **User Management** and assigns the role of Treasurer and approves it. The Statement of Organization now needs to be **amended and filed**, designating a new treasurer.
- 4 The new treasurer logs in to **Amend** the Statement of Organization. The new treasurer's name will automatically populate. On the Persons tab, click the **Edit** button for the treasurer and add the required mailing address and email address for the treasurer. Click the "Campaign Account Signer" checkbox to confirm that the treasurer is a signer on the committee's campaign account.
 

**note**

If the candidate logs in to amend, the treasurer's name will not be populated and will need to be entered, along with the treasurer's contact information.
- 5 Check **Submit Filing**. At Attestation, click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.
 

**Remember!**

The treasurer and the candidate must each attest before the filing is complete.
- 6 Once the amended Statement of Organization is approved, the candidate's role as Candidate/Treasurer will be expired by the system, and the candidate receives the role of Candidate.

### Adding the Candidate as Treasurer

If the candidate wants to start serving the committee as both the candidate and the treasurer, and a treasurer already exists:

- 1 The candidate logs in.
- 2 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 3 Select the Persons tab on the Statement of Organization to access the Persons Associated with Committee information page.
- 4 Click the **Remove** button to the right of the existing Treasurer. Confirm that you want to delete the Treasurer.
- 5 Click on the **Edit** button for the candidate.
- 6 Check the box indicating that,  
This individual is also: Treasurer
- 7 Click **Save** and **Submit Filing**. At Attestation, the candidate clicks on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

### Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.

- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the committee has a separate candidate and treasurer, both persons must attest. The second person attests by clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Inactivating a Committee for an Election

For a primary or general election, it is assumed that all committees are active. Approximately three months prior to a primary or general election, ORESTAR activates any candidate or political action committee not already activated.

If a candidate committee is not active and does not want to be subject to seven-day reporting, the candidate or treasurer can inactivate the committee and “opt out” of the election.

- 1 Click on the committee name on the Private Workshop page. The committee's current Statement of Organization displays.
- 2 Click on the Election Activity Log link at the bottom of the Statement of Organization.

Oregon Secretary of State

# Kate Brown

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

February 23, 2012 (Version: v3.6.1)

<a href="#">Private Workshop</a> >> <a href="#">Public Search</a> >> <a href="#">My Vote</a> <a href="#">Election Results</a> <a href="#">Submit New Filing</a> >> <a href="#">User Management</a> <a href="#">Sign out</a>	Election Activity Log															
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Election</th> <th style="text-align: left;">Active Date</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">Active Reason</th> <th style="text-align: right;"></th> </tr> </thead> <tbody> <tr> <td>2012 Primary Election</td> <td>02/21/2012</td> <td>Active</td> <td>System Generated / Primary or General Election</td> <td style="text-align: right;"><a href="#">Inactivate</a></td> </tr> <tr> <td>2011 May Election</td> <td>02/01/2011</td> <td>Active</td> <td>Statement of Organization</td> <td style="text-align: right;"><a href="#">Inactivate</a></td> </tr> </tbody> </table>	Election	Active Date	Status	Active Reason		2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>	2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>
Election	Active Date	Status	Active Reason													
2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	<a href="#">Inactivate</a>												
2011 May Election	02/01/2011	Active	Statement of Organization	<a href="#">Inactivate</a>												

- 3 Click on the Inactivate link associated with the appropriate election.

A committee with an active reason of 'Statement of Organization' or 'Contribution to Active Candidate or Measure Committee' may not be inactivated for that election.

**note**

If a candidate committee inactivates for an election, but subsequently becomes active, the candidate or treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link (see page 40).

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer or candidate must file a **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.

The screenshot shows the 'Private Workshop' interface for the Oregon Secretary of State, Kate Brown. The header includes the Elections Division contact information and the date August 5, 2011. A sidebar on the left contains navigation links such as 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', and 'Sign out'. The main content area is titled 'Private Workshop' and features a 'File New Political Committee' link. Below this is a table of 'Active Committees' with columns for 'Committee Name', 'ID', and action buttons. The table lists three committees: 'Jones, Jane ORESTAR User's Manual Committee (Treasurer)' with ID 15137, 'ORESTAR Petition (Treasurer)' with ID 15138, and 'ORESTAR System PAC (Treasurer)' with ID 15139. Each row has 'Amend' and 'Discontinue' buttons. A legend at the bottom identifies status icons: Active (green triangle), Pending Approval (yellow triangle), Pending Insufficient (orange triangle), Discontinued (black triangle), Rejected (red triangle), and Work In Progress (blue triangle).

To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

The screenshot shows the 'Notice of Intent to Discontinue' form in the ORESTAR system. The header includes the Oregon Secretary of State, Kate Brown, and the Elections Division contact information, dated August 19, 2011. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'Notice of Intent to Discontinue' and specifies 'ORESTAR User's Manual Committee (15137)'. The form contains the text: 'File Notice of Intent to Discontinue', 'Effective Date: 08/19/2011', and a statement: 'By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.' Below this text are 'File' and 'Cancel' buttons.

- 2 Click **File** to file the Notice of Intent to Discontinue.

- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.

- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.

If the committee has a separate candidate and treasurer, both persons must attest. The second person attests by logging in to ORESTAR, clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.

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# Political Action Committee

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## Entering a Statement of Organization

Complete the steps for selecting the committee type “Political Action Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Political Action Committee** (form SEL 221), which includes **Campaign Account Information** (form SEL 223).

### Data Entry Instructions

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 Statement of Organization 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 for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

## Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a political action committee.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Committee Persons PAC Type Measures Recall Campaign Account Multiple Directors

Committee Information

Next Save as work in progress Submit Filing

Original  Amendment  Discontinuation

Name of Committee

Acronym

Committee Address and Campaign Phone

Street Address:

City, State, Zip Code:  Oregon  -

Extension

Campaign Phone:

1 Enter the following information about the committee:

- **Name of Committee:** The official name of the committee.
- **Acronym:** Any abbreviated name or acronym the committee uses to identify itself.
- **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.
- **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons that are associated with the committee, including the treasurer, committee directors, alternate transaction filer and correspondence recipient.

Click on the **Edit** button associated with the treasurer and the Add/Edit Treasurer Information page displays.

## Treasurer Information



- 1 Enter the following information about the treasurer. Name, mailing address and email address are required.
  - **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired.
  - **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

**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 on the user's account profile and to email addresses on the committee's Statement of Organization.

- **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate's user profile, if different.
  - **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes. A treasurer must be a campaign account signer. Click in the "Campaign Account Signer" checkbox to confirm that the treasurer is a signer on the committee's campaign account.
- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.
  - 3 Click on **Add Committee Director** and the Add/Edit Committee Director Information page displays.

### ***Committee Director Information***

A committee director is, in part, any person who directly and substantially participates in decision-making on behalf of a political committee concerning the solicitation or expenditure of funds. If any individual meets the definition of director, that person must be designated as a director.

**A political action committee must have at least one committee director who is someone other than the treasurer.** The treasurer cannot be the sole committee director added on the Persons tab.

Oregon Secretary of State  
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Elections Division  
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August 19, 2011 (Version : v3.5.11.QA)

**Statement of Organization for Political Action Committee**

Add/Edit Committee Director Information

Cancel Save

**Name**  Prefix  First  MI  Last  Suffix  Title

**Mailing Address**

Street Address / PO Box:

City, State, Zip Code:   -

**Occupational Information**

Not Employed  Self-Employed

Occupation:

Employer's Name:

Employer's City / State:

**Contact Information**

Work Phone:  Ext:

This individual is also:

Alternate Transaction Filer

Correspondence Recipient

Campaign Account Signer

1 Enter the following information about each committee director. Name, mailing address and occupational information are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The individual's street address or PO Box, city, state and zip code.

→ **Occupational Information:**

If the individual is not employed (including retired, student, etc.), select "Not Employed" by clicking in the box.

If the individual is self-employed, select "Self-Employed" by clicking in the box, and provide the nature of the individual's occupation.

If the individual is employed by another person, provide the individual's occupation and employer's name and address (city and state).

→ **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.

→ **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

If the committee has another director, click on **Add Committee Director**.

To make further edits on an original filing or to update a committee director's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate committee director.

To remove a committee director on an amended Statement of Organization, click on the **Remove** button associated with the appropriate committee director.

- 3 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

**Alternate Transaction Filer Information**

The alternate transaction filer is a person, in addition to the treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the treasurer as the alternate transaction filer.

If a committee director is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Committee Director Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

- 1 Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

- Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.

- If the committee wants to designate a correspondence recipient, click on **Add Correspondence Recipient** and the Add/Edit Correspondence Recipient Information page displays.

### **Correspondence Recipient Information**

The correspondence recipient is a person, in addition to the treasurer, designated to receive all notices sent by the Elections Division under ORS chapters 246 to 260. Do not designate the treasurer as the correspondence recipient.

If a committee director or the alternate transaction filer is designated as the correspondence recipient (i.e., the Correspondence Recipient checkbox on the Add/Edit Committee Director Information page or the Add/Edit Alternate Transaction Filer Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Correspondence Recipient section. Click on the **Edit** button to add the required email address, if necessary.

Oregon Secretary of State  
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Elections Division  
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503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Political Action Committee

Add/Edit Correspondence Recipient Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

Mailing Address

Street Address / PO Box:

City, State, Zip Code:   -

Contact Information

Work Phone:  Ext:

Email:

This individual is also:

Committee Director

Alternate Transaction Filer

Campaign Account Signer

- Enter the following information about the correspondence recipient. Name, mailing address and email address are required.

→ **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the individual wishes to receive committee correspondence from the Elections Division.

**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 provided on the Statement of Organization. A correspondence recipient should not create a user account.

- **Contact Information:** The work phone is the number where the correspondence recipient can be reached during normal business hours. The email address is where the individual wishes to receive committee correspondence from the Elections Division.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the correspondence recipient's information on an amended Statement of Organization, click on the **Edit** button associated with the correspondence recipient.

To remove the correspondence recipient on an amended Statement of Organization and designate a different person, click on the **Remove** button associated with the alternate transaction filer.

3 Click on **Next**. The PAC Type Information page displays.

**PAC Type Tab**

The screenshot shows the Oregon Secretary of State website for Kate Brown. The page title is "Statement of Organization for Political Action Committee". The navigation tabs include Committee, Persons, PAC Type (selected), Measures, Recall, Campaign Account, and Multiple Directors. The "PAC Type Information" section contains the following fields and controls:

- Buttons: Back, Next, Save as work in progress, Submit Filing
- Type of Political Action Committee: [Dropdown menu]
- Party Affiliation: [Dropdown menu]
- Nature of Political Action Committee: [Text input field]
- Is this committee a controlled committee?: [Select One dropdown menu]
- Controlling Candidates: [List of candidates with "Remove" checkboxes and dropdown menus]
- If the name of the candidate you wish to select cannot be found, enter the candidate's name below: [Table with First Name and Last Name columns and "Remove" checkboxes]
- Additional Controlling Candidates: [Text input field]

1 Enter the following information about the type and nature of the committee.

→ **Type of Political Action Committee:** Select the type of committee by clicking on the down arrow and choosing the appropriate value from the list. The choices are:

**Caucus:** A committee affiliated with either chamber of the Legislative Assembly.

**Measure:** A committee that exclusively supports or opposes one or more measures on the ballot.

**Miscellaneous:** A committee that supports or opposes specific candidates or a combination of candidates and measures.

**Political Party:** A committee established by a major or minor political party qualified under ORS chapter 248 or a committee established under the party's bylaws (e.g., county central committees).

**Recall:** A committee supporting or opposing the recall of a public official subject to a recall election.

→ **Party Affiliation:** For a political party committee, select the party affiliation by clicking on the down arrow and choosing the appropriate value from the list.

→ **Nature of Political Action Committee:** A description of the general nature of the committee (e.g., to support all candidates and measures advocating health care for all).

→ **Is this committee a controlled committee?:** Answer Yes or No to the question by clicking on the down arrow and select the appropriate value from the list.

A controlled committee is a political committee that, in connection with the making of contributions or expenditures:

- is controlled directly or indirectly by a candidate or a controlled committee,
- or
- acts jointly with a candidate or controlled committee.

A candidate controls a political committee if:

- the candidate, the candidate's agent, a member of the candidate's immediate family or any other political committee that the candidate controls has a significant influence on the actions or decisions of the political committee,
- or
- the candidate's committee and the political committee both have the candidate or a member of the candidate's immediate family as a treasurer or director.

**All caucus committees are controlled committees.**

→ **Controlling Candidate(s):** If the committee is a controlled committee, identify the candidate(s) controlling the committee. Begin typing the candidate's last name in the field. The selection will move to the first candidate in the list whose name matches the typed letters. If the candidate displays on the list, select the name by clicking on it. If the candidate is not found on the list, type the candidate's first and last names in the fields below.

If more than three candidates control the committee, click on the **Additional Controlling Candidates** button and more fields become available.

To remove a controlling candidate on an amended Statement of Organization, click in the appropriate "Remove" checkbox.

- 2 Click on **Next**. The Measures the Committee Supports or Opposes page displays.

### Measures Tab

Oregon Secretary of State  
**Kate Brown**
Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 19, 2011 (Version : v3.5.11.QA)

Statement of Organization for Political Action Committee

Committee
Persons
PAC Type
Measures
Recall
Campaign Account
Multiple Directors

Measures the Committee Supports or Opposes

Back
Next
Save as work in progress
Submit Filing

**Committee** ORESTAR System PAC

Remove all existing measures.

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Select Measure by Number:  or Select Measure by Title:

Measure Title:

Support or Oppose:   Remove this measure

Additional Measures

**If the local measure could not be found enter the information below**

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

**Measure**

Select Year:

Select Election:

Local Measure Number:  and Caption:

County:

Support or Oppose:   Remove this measure

Additional Local Measures

- 1 Enter the following information for each measure the committee supports or opposes. A measure committee must always have at least one measure designated.

To complete each field, click on the down arrow and choose the appropriate value from the list.

→ **Year:** Select the year in which the measure appears on the ballot.

→ **Election:** Select the election in which the measure appears on the ballot.

→ **Measure by Number:** Select the number of the measure supported or opposed or click on the **Select Measure by Title** link to select the measure by its ballot title. A measure that has not yet been assigned a measure number should be selected by its ballot title.

→ **Support or Oppose:** Indicate the committee's position on the measure by selecting Support or Oppose from the list.

If a committee supports or opposes more than three measures, click on the **Additional Measures** button and more fields become available.

To remove a measure on an amended Statement of Organization, click in the appropriate "Remove this measure" checkbox. To remove all measures, click in the "Remove all existing measures" checkbox.

If the local measure the committee is supporting or opposing cannot be found on the list, enter the measure information in the lower portion of the page. Use the following rules to complete the County field:

For a county measure, select the county.

For a city measure, select the county in which the city hall of the city is located.

For a special district measure, select the county in which the administrative office of the district is located.

- 2 Click on **Next**. The Recall Elections the Committee Supports or Opposes page displays.



Recall Tab

The screenshot shows the Oregon Secretary of State's website interface. At the top, it identifies the Secretary as Kate Brown and provides contact information for the Elections Division. The main navigation bar includes tabs for Committee, Persons, PAC Type, Measures, Recall, Campaign Account, and Multiple Directors. The current page is titled 'Recall Elections the Committee Supports or Opposes' for the 'ORESTAR System PAC' committee. The form contains three identical 'Recall' sections, each with the following fields: 'Select Year' (dropdown), 'Select Election' (dropdown), 'Candidate First Name' and 'Last Name' (text boxes), 'Office of Candidate' (dropdown), 'District/Position/County' (dropdown), and 'Support or Oppose' (dropdown set to 'Select One'). Each section also has a 'Remove this Recall Candidate' checkbox. At the bottom of the form is an 'Additional Recall Candidates' button.

- 1 Enter the following information about each recall the committee supports or opposes. A recall committee must always have at least one recall designated.
  - **Year:** Select the year in which the recall appears on the ballot by clicking on the down arrow and choosing the appropriate value from the list.
  - **Election:** Select the election in which the recall appears on the ballot by clicking on the down arrow and choosing the appropriate value from the list.
  - **Candidate First and Last Name:** Enter the recall candidate's first and last name.
  - **Office of Candidate:** Select the office currently held by the candidate subject to the recall by clicking on the down arrow and choosing the appropriate value from the list.
  - **District/Position/County:** Select the district, position, county or city of the office the candidate currently holds by clicking on the down arrow and choosing the appropriate value from the list.

→ **Support or Oppose:** Indicate the committee's position on the recall by clicking on the down arrow and selecting Support or Oppose from the list. Support means the committee supports recalling the candidate and Oppose means the committee opposes recalling the candidate.

2 Click on **Next**. The Campaign Account Information page displays.

## Campaign Account Tab

The screenshot shows the Oregon Secretary of State's website interface. The header includes the Oregon Secretary of State's name, "Kate Brown", and the Elections Division contact information: "255 Capitol St NE, Ste 501, Salem, OR 97310" and "503.986.1518 or 1.866.ORE.VOTE". The date "August 19, 2011" and version "v3.5.11.QA" are also displayed. The main content area is titled "Statement of Organization for Political Action Committee" and has tabs for "Committee", "Persons", "PAC Type", "Measures", "Recall", "Campaign Account", and "Multiple Directors". The "Campaign Account" tab is selected, showing "Campaign Account Information". There are buttons for "Back", "Next", "Save as work in progress", and "Submit Filing". The form fields include "Committee" (ORESTAR System PAC), "Name of Oregon Financial Institution", "Account Number", "Name of Account", and "Name of Account Holder". Below these fields is a section titled "List the names of persons with signature authority for campaign account" with a table for entering names (Prefix, First, MI, Last, Suffix, Title) and an "Additional persons with signature authority" button.

1 Enter the following information about the committee's campaign account:

→ **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.

→ **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

→ **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**

→ **Name of Account Holder:** The name of the account holder. For a political action committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. The treasurer must be a signer on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

- 2 Click on **Next**. The Multiple Director Information page displays.

### Multiple Directors Tab

The screenshot shows the 'Statement of Organization for Political Action Committee' page. The 'Multiple Directors' tab is active. The form is titled 'Multiple Director Information' and includes buttons for 'Back', 'Save as work in progress', and 'Submit Filing'. The committee is identified as 'ORESTAR System PAC'. The form prompts the user to 'Enter the following information when two or more Directors are Directors of another Political Committee:'. It has sections for 'Identify Committee' with 'By Committee ID' and 'By Committee Name' fields and 'Found Committee Names' dropdown. Below is the 'Committee Selected' section with 'Name', 'Street Address', and 'City, State, Zip Code' fields. At the bottom, there is a checkbox to 'Remove this set of Director/Committee Information'.

If the committee has only one committee director, skip this page. If two or more committee directors are also directors of another political committee, identify the other committee and the directors serving on both committees.

- 1 To identify the other committee, enter the committee's identification number in the By Committee ID field or enter any portion of the committee's name in the By Committee Name field and click on the corresponding **Find** button.
- 2 Select the committee by clicking on the down arrow and choosing the appropriate value from the Found Committee Names list. The committee's name and address display in the Committee Selected section of the page.
- 3 Select the committee directors who are also directors of the committee selected by clicking in the appropriate checkboxes.

If there are more than three sets of multiple director information, click on the **Additional Multiple Directors** button and more fields become available.

To remove a set of multiple director information on an amended Statement of Organization, click in the appropriate "Remove this set of Director/Committee Information" checkbox.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.

The screenshot shows the 'Attestation' page in the ORESTAR system. The header features the Oregon Secretary of State's name, 'Kate Brown', and the Elections Division's address and phone numbers. A navigation menu on the left includes options like 'Private Workshop', 'Public Search', 'My Vote', 'Submit New Filing', 'User Management', and 'Sign out'. The main content area is titled 'Attestation' and contains two buttons: 'Edit Statement of Organization' and 'Review Statement of Organization'. Below these buttons is a paragraph of text: 'By clicking the File button below I, John Smith, am attaching my electronic signature and I hereby acknowledge that I am personally liable for any penalties imposed under ORS chapter 260.' This is followed by the instruction 'If you do not agree to the above statement, click on Cancel to stop the filing.' and two buttons: 'File' and 'Cancel'.

- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link.  
To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

### **note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The current treasurer assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.

- 3 The new treasurer files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Inactivating a Committee for an Election

For a primary or general election, it is assumed that all committees are active. Approximately three months prior to a primary or general election, ORESTAR activates any candidate or political action committee not already activated.

If a political action committee is not active and does not want to be subject to seven-day reporting, the treasurer can inactivate the committee and "opt out" of the election.

- 1 Click on the committee name on the Private Workshop page. The committee's current Statement of Organization displays.

- 2 Click on the Election Activity Log link at the bottom of the Statement of Organization.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

February 23, 2012 (Version: v3.6.1)

Election Activity Log				
Election	Active Date	Status	Active Reason	Inactivate
2012 Primary Election	02/21/2012	Active	System Generated / Primary or General Election	Inactivate
2011 May Election	02/01/2011	Active	Statement of Organization	Inactivate

- 3 Click on the Inactivate link associated with the appropriate election.

A committee with an active reason of 'Statement of Organization' or 'Contribution to Active Candidate or Measure Committee' may not be inactivated for that election.

**note**

If a political action committee inactivates for an election, but subsequently becomes active, the treasurer can access the Election Activity Log and voluntarily activate the committee by clicking on the Activate link (see page 40).

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer must file the **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 5, 2011 (Version : v3.5.10)

Private Workshop

File New Political Committee

Committee Name	ID	Amend	Discontinue	Campaign Finance
Jones, Jane ORESTAR User's Manual Committee (Treasurer)	15137	Amend	Discontinue	Campaign Finance
ORESTAR Petition (Treasurer)	15138	Amend	Discontinue	Campaign Finance
ORESTAR System PAC (Treasurer)	15139	Continue With Filing	Delete	

Legend

- Active
- Pending Approval
- Pending Insufficient
- Discontinued
- Rejected
- Work In Progress

To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

The screenshot shows the ORESTAR web application interface. At the top left, it says 'Oregon Secretary of State Kate Brown'. To the right, it lists 'Elections Division' with the address '255 Capitol St NE, Ste 501, Salem, OR 97310' and phone numbers '503.986.1518 or 1.866.ORE.VOTE'. Below this, the date 'August 19, 2011' and version '(Version : v3.5.11.QA)' are shown. The main content area is titled 'Notice of Intent to Discontinue' and 'ORESTAR User's Manual Committee (15137)'. The central heading is 'File Notice of Intent to Discontinue'. Below this, it states 'Effective Date: 08/19/2011' and provides a warning: 'By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.' At the bottom, it says 'If you do not agree to the above statement, click on the Cancel button to stop the filing.' and has two buttons: 'File' and 'Cancel'.

- 2 Click **File** to file the Notice of Intent to Discontinue.
- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.

- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.
- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.





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# Petition Committee

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## Entering a Statement of Organization

Complete the steps for selecting the committee type “Petition Committee”, outlined on page 45. Then begin entering information on the set of tabbed pages for **Statement of Organization for Petition Committee** (form SEL 222), which includes **Campaign Account Information** (form SEL 223).

### Data Entry Instructions

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 Statement of Organization 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 for the committee. A work in progress Statement of Organization does not become public record until it is filed with and approved by the Elections Division.
- **Submit Filing** performs validation on the Statement of Organization and notifies the user of any errors. If no errors are found, the user is presented with the Attestation page where the user electronically signs the Statement of Organization and files it with the Elections Division.

### Committee Tab

The Committee Information page is the first of the Statement of Organization entry pages for a petition committee.

Oregon Secretary of State <b>Kate Brown</b>		Elections Division 255 Capitol St NE, Ste 501, Salem, OR 97310 503.986.1518 or 1.866.ORE.VOTE
		August 19, 2011 (Version : v3.5.11.QA)
<b>Statement of Organization for Petition Committee</b>		
<a href="#">Committee</a> <a href="#">Persons</a> <a href="#">Petition</a> <a href="#">Campaign Account</a>		
<a href="#">Private Workshop</a> >> <a href="#">Public Search</a> >> <a href="#">My Vote</a> <a href="#">Submit New Filing</a> >> <a href="#">User Management</a> <a href="#">Sign out</a>	<b>Committee Information</b>	
<input type="button" value="Next"/> <input type="button" value="Save as work in progress"/> <input type="button" value="Submit Filing"/>		
<input checked="" type="radio"/> Original <input type="radio"/> Amendment <input type="radio"/> Discontinuation		
Name of Committee <input type="text"/> Acronym <input type="text"/> <b>Committee Address and Campaign Phone</b> Street Address : <input type="text"/> <input type="text"/> City, State, Zip Code : <input type="text"/> Oregon <input type="text"/> - <input type="text"/> <div style="text-align: center;">Extension</div> Campaign Phone : <input type="text"/> <input type="text"/>		
<a href="#">Elections Home</a> <a href="#">Elections History</a> <a href="#">Initiative, Referendum &amp; Referral</a> <a href="#">Publications and Forms</a>		

1 Enter the following information about the committee:

→ **Name of Committee:** The official name of the committee.

→ **Acronym:** Any abbreviated name or acronym the committee uses to identify itself.

→ **Committee Address:** The address of a residence, office, headquarters or similar location in Oregon where the committee or a responsible officer of the committee can conveniently be found. Do not use a post office box number.

→ **Campaign Phone:** The campaign's phone number, if the campaign has one.

2 Click on **Next**. The Persons Associated with Committee page displays.

## Persons Tab

The Persons Associated with Committee page displays information about all persons who are associated with the committee, including the treasurer, chief petitioners and alternate transaction filer.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.QA)

Statement of Organization for Petition Committee

Committee **Persons** Petition Campaign Account

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Persons Associated with Committee

Back Next Save as work in progress Submit Filing

**Treasurer**  
Name: John Smith   
Address:  
Contacts:

**Chief Petitioner**  
Add Chief Petitioner

**Alternate Transaction Filer**  
Add Alternate Transaction Filer

### Treasurer Information

- 1 If the treasurer or chief petitioner/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the treasurer. If the chief petitioner is entering the Statement of Organization and is appointing a separate treasurer, click on **Add Treasurer**. The Add/Edit Treasurer Information page displays.

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.QA)

Statement of Organization for Petition Committee

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

Add/Edit Treasurer Information

Cancel Save

Name  Prefix  First  MI  Last  Suffix  Title

**Mailing Address**  
Street Address / PO Box:   
City, State, Zip Code:   -

**Contact Information**  
Work Phone:  Ext:   
Home Phone:   
Fax:   
Email:

This individual is also:  
 Petitioner  
 Campaign Account Signer

2 Enter the following information about the treasurer. Name, mailing address and email address are required.

→ **Name:** The treasurer's name (first, middle and last) is automatically populated from the user's profile if the treasurer or chief petitioner/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be added if desired. If the chief petitioner is completing the Statement of Organization and is appointing a separate treasurer, enter the treasurer's name.

→ **Mailing Address:** The address, including street or PO Box, city, state and zip code, where the treasurer wishes to receive committee correspondence from the Elections Division.

**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 on the user's account profile and to email addresses on the committee's Statement of Organization.

→ **Contact Information:** The work phone, home phone, fax and email address for the treasurer. The work number is the number where the treasurer can be reached during normal business hours. An email address is required to be entered. This email address is used for emailing system-generated reports, but reports are also sent to the email address on the candidate's user profile, if different.

→ **This individual is also:** Identify any additional roles the treasurer has with the committee by clicking in the appropriate checkboxes.

3 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the treasurer's information on an amended Statement of Organization, click on the **Edit** button associated with the treasurer.

4 If the chief petitioner or chief petitioner/treasurer is entering the Statement of Organization, click on the **Edit** button associated with the chief petitioner. If the treasurer is entering the Statement of Organization, click on **Add Chief Petitioner**. The Add/Edit Chief Petitioner Information page displays.

**Chief Petitioner Information****Remember!**

A recall petition can have only one chief petitioner, but an initiative or referendum petition may have up to three chief petitioners.

The screenshot shows the Oregon Secretary of State website interface. The header features the name 'Kate Brown' and the Oregon state seal. The main content area is titled 'Statement of Organization for Petition Committee' and 'Add/Edit Chief Petitioner Information'. The form includes a 'Name' section with dropdown for Prefix and input fields for First, MI, Last, Suffix, and Title. The 'Mailing Address' section has input fields for Street Address / PO Box, City, State, and Zip Code. The 'Contact Information' section has input fields for Work Phone and Ext. At the bottom, there are checkboxes for 'Alternate Transaction Filer' and 'Campaign Account Signer'. A sidebar on the left contains navigation links like 'Private Workshop', 'Public Search', and 'My Vote'.

1 Enter the following information about each chief petitioner. Name and mailing address are required.

- **Name:** The chief petitioner's name (first, middle and last) is automatically populated from the user profile if the chief petitioner or chief petitioner/treasurer is completing the Statement of Organization. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) fields can be added if desired. If the treasurer is completing the Statement of Organization, enter the chief petitioner's name.
- **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
- **Contact Information:** The work phone for the individual. The work number is the number where the individual can be reached during normal business hours.
- **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.

If the initiative or referendum petition sponsored by the committee has another chief petitioner, click on **Add Chief Petitioner**.

To make further edits on an original filing or to update a chief petitioner's information on an amended Statement of Organization, click on the **Edit** button associated with the appropriate chief petitioner.

To remove a chief petitioner on an amended Statement of Organization, click on the **Remove** button associated with the appropriate chief petitioner.

2 If the committee wishes to designate an alternate transaction filer, click on **Add Alternate Transaction Filer** and the Add/Edit Alternate Transaction Filer Information page displays.

**Alternate Transaction Filer Information**

The alternate transaction filer is a person, in addition to the treasurer, who is authorized to file campaign finance transactions on behalf of the committee. A committee may have only one alternate transaction filer. Do not designate the treasurer as the alternate transaction filer.

If a chief petitioner is designated as the alternate transaction filer (i.e., the Alternate Transaction Filer checkbox on the Add/Edit Chief Petitioner Information page is checked), the individual's name, mailing address and contact information are automatically populated in the Alternate Transaction Filer section.

- 1 Enter the following information about the alternate transaction filer. Name and email address are required.
  - **Name:** The individual's first and last name must be entered. Prefix (Mr. or Ms.), suffix (Jr., Sr., III, etc.) and title (MD, CPA, etc.) can be entered if desired.
  - **Mailing Address:** The individual's street address or PO Box, city, state and zip code.
  - **Contact Information:** The work phone is the number where the alternate transaction filer can be reached during normal business hours. An email address is required for the individual.
  - **This individual is also:** Identify any additional roles the individual has with the committee by clicking in the appropriate checkboxes.
- 2 Click on **Save** to save the information entered and return to the Persons Associated with Committee page.

To make further edits on an original filing or to update the alternate transaction filer's information on an amended Statement of Organization, click on the **Edit** button associated with the alternate transaction filer.

To remove an alternate transaction filer on an amended Statement of Organization, click on the **Remove** button associated with the alternate transaction filer.

- 3 Click on **Next**. The Petition Information page displays.

## Petition Tab

Oregon Secretary of State  
**Kate Brown**

Elections Division  
255 Capitol St NE, Ste 501, Salem, OR 97310  
503.986.1518 or 1.866.ORE.VOTE

August 22, 2011 (Version : v3.5.11.0A)

Private Workshop >>  
Public Search >>  
My Vote  
Submit New Filing >>  
User Management  
Sign out

Elections Home  
Elections History  
Initiative, Referendum & Referral  
Publications and Forms

**Statement of Organization for Petition Committee**

Committee Persons **Petition** Campaign Account

Back Next Save as work in progress Submit Filing

Type of Petition Committee: [v]

**Petition**

State Petition  
Year: [v]  
Select Petition by Number: [v] or Select Petition by Title [v]

Local Petition  
Date Petition Filed: [v] ...  
Petition #: [v]  
Title: [v]

**Recall**  
Identify the following information about the public official the committee intends to recall:  
First Name: [v]  
Last Name: [v]  
Office: [v]  
District, Position, County or City: [v]

1 Enter the following information about the petition the committee sponsors.

→ **Type of Petition Committee:** Select the type of petition committee by clicking on the down arrow and choosing the appropriate value from the list. The choices are:

Initiative  
Recall  
Referendum

→ **State/Local Petition:** For a petition committee sponsoring an initiative or referendum petition, select either State Petition or Local Petition by clicking in the appropriate checkbox. If State Petition is selected, continue with step 2. If Local Petition is selected, continue with step 3.

2 Enter the following information if the committee is sponsoring a state initiative or referendum petition.

→ **Year:** Select the year the petition will appear on the ballot, if the petition effort is successful, by clicking on the down arrow and choosing the appropriate value from the list.

→ **Petition by Number:** Select the number assigned to the petition by clicking on the down arrow and choosing the appropriate value from the list or click on the Select Petition by Title link to select the petition by its subject or ballot title.

3 Enter the following information if the committee is sponsoring a local initiative or referendum petition.



- **Date Petition Filed:** The date the prospective initiative or referendum petition was filed with the local filing officer.
- **Petition #:** The petition number assigned by the filing officer for the petition.
- **Title:** The ballot title, or subject if no ballot title, for the petition.

4 Enter the following information if the committee is sponsoring a recall petition.

- **Recall Candidate’s Name:** The office holder’s first and last names, office, position number if applicable, and the district, county or city for the individual who the committee intends to recall.

5 Click on **Next**. The Campaign Account Information page displays.

### Campaign Account Tab

The screenshot shows the 'Statement of Organization for Petition Committee' page. The header includes the Oregon Secretary of State, Kate Brown, and the Elections Division contact information. The page has a navigation menu on the left and a main content area with tabs for 'Committee', 'Persons', 'Petition', and 'Campaign Account'. The 'Campaign Account' tab is selected, displaying 'Campaign Account Information'. There are buttons for 'Back', 'Save as work in progress', and 'Submit Filing'. The form includes fields for 'Name of Oregon Financial Institution', 'Account Number', 'Name of Account', and 'Name of Account Holder'. Below these is a section titled 'List the names of persons with signature authority for campaign account.' with a table for entering names (Prefix, First, MI, Last, Suffix, Title) and an 'Additional persons with signature authority' button.

Enter the following information about the committee’s campaign account:

- **Name of Oregon Financial Institution:** The name of the Oregon financial institution where the account is maintained.
- **Account Number:** The number of the account.

To edit the account number on an amended Statement of Organization, click on the **Edit Account Number** button that displays to the right of the Account Number field.

- **Name of Account:** The name of the account. **It must be identical to the official name of the committee.**
- **Name of Account Holder:** The name of the account holder. For a petition committee, the account holder must include the treasurer, or the name of the committee or the affiliated organization that administers the account. If

the treasurer is an account holder, other individuals may also be listed as account holders, as long as they have signature authority.

→ **Names of Persons with Signature Authority:** The names of persons who have signature authority on the campaign account. The treasurer must be a signer on the campaign account. The names of individuals identified as campaign account signers on the Persons tab will automatically be populated.

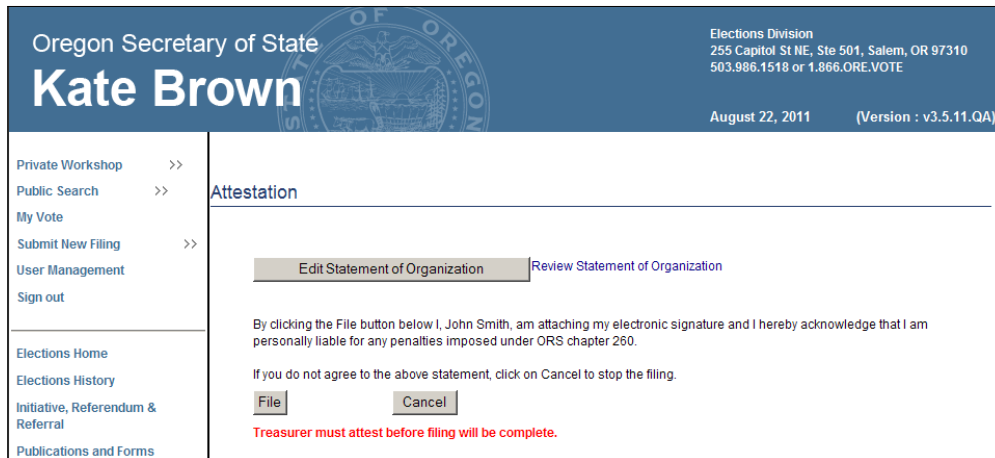
To add more rows, click on the **Additional persons with signature authority** button.

To remove a person with signature authority on an amended Statement of Organization, click on the appropriate **Remove** button.

## Filing a Statement of Organization and Attestation

- 1 When the Statement of Organization has been completed, click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.



- 2 Read the attestation and if agreed, click on the **File** button to attest and file the Statement of Organization with the Elections Division.

To review the Statement of Organization prior to filing, click on the Review Statement of Organization link.

To make changes to the Statement of Organization prior to filing, click on **Edit Statement of Organization**.

A Statement of Organization that is completed by the chief petitioner also requires the signature of the treasurer. See below for instructions on filing a Statement of Organization that requires multiple signatures.

**note**

A Statement of Organization for a new committee must be approved by the Elections Division prior to the committee having access to the campaign finance portion of the system.

### Filing a Statement of Organization that Requires Multiple Signatures

The following describes the process for filing a Statement of Organization for a new committee when multiple signatures are required. Multiple signatures are required only if the chief petitioner completes the Statement of Organization. A Statement of Organization completed by the treasurer can be filed without the signature of a chief petitioner.

- 1 The chief petitioner completes the Statement of Organization for the committee, including attesting to the filing. The Statement of Organization is assigned the Work In Progress status.
- 2 The treasurer creates a user account, if one does not already exist. See **Creating a User Account** on page 15. If the treasurer already has a user account but has not requested access to the work in progress committee started by the chief petitioner, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.

- 3 The chief petitioner assigns the Treasurer role to the treasurer and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27.
- 4 The treasurer accesses the Private Workshop page and clicks on the **Continue with Filing** button associated with the committee and then clicks on the **File** button to attest to the Statement of Organization filing.

## Changing Treasurers

To change treasurers, proceed with the following:

- 1 The new treasurer creates a user account, if one does not already exist, and requests access to the committee. See **Creating a User Account** on page 15. If the new treasurer already has a user account but has not requested access to the committee, see **Requesting Access to a Committee When Logged In to ORESTAR** on page 20.
- 2 The current treasurer (or chief petitioner, if the chief petitioner has a user account) assigns the new treasurer the Treasurer role and approves the user's access to the committee. See **Granting Access to a Committee's Account** on page 27. If the new treasurer already has access to the committee with a role other than Treasurer, see **Changing a User's Role** on page 30. The new treasurer's initial access to the committee is limited to amending the committee's Statement of Organization.
- 3 The new treasurer files an amended Statement of Organization to make the treasurer change official. To amend, use the Remove button to first remove the old treasurer, then add the new treasurer.

When the amended Statement of Organization is approved by the Elections Division, the new treasurer is given full access to the committee, including campaign finance, and the old treasurer's role is automatically updated to Former Treasurer. A Former Treasurer is authorized to add, edit, delete and file transactions with a transaction date that is prior to the date the amended Statement of Organization designating a new treasurer is approved by the Elections Division. A Former Treasurer's access to the **Campaign Finance** button ends the day after the last exam letter response date for transactions the user filed.

An amended Statement of Organization to change treasurers must be filed using the paper form if the chief petitioner or current treasurer is not registered in ORESTAR and cannot approve the new treasurer's access to the committee. Once the Statement of Organization amendment is filed, you must contact the Elections Division during business hours to establish the new treasurer's access to the committee.

## Amending a Committee's Statement of Organization

To amend a committee's Statement of Organization, proceed with the following:

- 1 Click on the **Amend** button associated with the committee on the Private Workshop. The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing.
- 2 Make the appropriate changes and click on **Submit Filing**. The Statement of Organization is validated and if no errors are found, the Attestation page displays.

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 should fix any errors found and click on **Submit Filing** again.

- 3 Read the attestation and click on the **File** button to attest and file the amended Statement of Organization with the Elections Division.

If the chief petitioner files the amended Statement of Organization, the treasurer must also attest to complete the filing. The treasurer attests by clicking on the **Continue with Filing** button on the Private Workshop and then clicking on the **File** button on the Attestation page.

If the amended Statement of Organization designates a new treasurer or alternate transaction filer, the filing must be approved by the Elections Division before the **Campaign Finance** button on the Private Workshop will display for the new treasurer or alternate transaction filer.

## Discontinuing a Committee

Prior to discontinuing a committee's registration and closing the committee's dedicated bank account, the treasurer must file the **Notice of Intent to Discontinue** (form SEL 224) with the Elections Division. The notice may be filed through ORESTAR or as a paper submission.

The notice may be filed before the committee files its final transactions to achieve a zero balance.

The screenshot shows the Oregon Secretary of State's ORESTAR Private Workshop interface. The header includes the name 'Kate Brown' and the date 'August 5, 2011'. The main content area is titled 'Private Workshop' and contains a table of 'Active Committees'. The table has columns for 'Committee Name' and 'ID'. Three committees are listed: 'Jones, Jane ORESTAR User's Manual Committee (Treasurer)' with ID 15137, 'ORESTAR Petition (Treasurer)' with ID 15138, and 'ORESTAR System PAC (Treasurer)' with ID 15139. Each row has buttons for 'Amend', 'Discontinue', and 'Campaign Finance'. The 'ORESTAR System PAC' row also has a 'Continue With Filing' and 'Delete' button. A legend at the bottom identifies the status icons: Active (green triangle), Pending Approval (yellow triangle), Pending Insufficient (orange triangle), Discontinued (black triangle), Rejected (red triangle), and Work In Progress (blue triangle).

To discontinue a committee, proceed with the following:

- 1 Click on the **Discontinue** button associated with the committee on the Private Workshop. The first time that **Discontinue** is selected for a committee, a Notice of Intent to Discontinue is made available for filing with the Elections Division.

Oregon Secretary of State <b>Kate Brown</b>		Elections Division 255 Capitol St NE, Ste 501, Salem, OR 97310 503.986.1518 or 1.866.ORE.VOTE
		August 19, 2011 (Version : v3.5.11.QA)
Private Workshop >> Public Search >> My Vote Submit New Filing >> User Management Sign out	<b>Notice of Intent to Discontinue</b>	
	ORESTAR User's Manual Committee (15137)	
	<b>File Notice of Intent to Discontinue</b>	
	Effective Date: 08/19/2011 By clicking the File button below I, John Smith, am attaching my electronic signature and certify that I intend to discontinue the committee and close the campaign account. I understand that I may not discontinue the committee or close the campaign account until I receive notification from the Elections Division that a final review of all statements filed under ORS 260.057 has been completed.	
	If you do not agree to the above statement, click on the Cancel button to stop the filing.	
	<input type="button" value="File"/> <input type="button" value="Cancel"/>	
Elections Home Elections History Initiative, Referendum & Referral		

- 2 Click **File** to file the Notice of Intent to Discontinue.
- 3 Once the Notice of Intent to Discontinue is filed, the committee's **Discontinue** button is no longer available, pending review of the committee's transactions by the Elections Division.
- 4 If the committee has filed all transactions and achieves a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division identifying any outstanding violations of Oregon election law and inform the committee that it can be discontinued. The committee's **Discontinue** button reappears.
 

If the committee does not have a zero balance when the Notice of Intent to Discontinue is filed, the committee will receive an email from the Elections Division as described above. The email will also state the committee has not achieved a zero balance, so the committee cannot be discontinued until the final transactions have been filed. When those additional transactions are reviewed, the notification of potential late or insufficient transactions that are subsequently filed will be sent via email and identified in the attached exam letter or amendment review report. The committee will send a final response to inform the committee that it can be discontinued. After that email is received, the committee's **Discontinue** button reappears.
- 5 To complete the discontinuation, click on the **Discontinue** button associated with the committee on the Private Workshop.
- 6 The Statement of Organization data entry screens display with the data from the committee's most recent Statement of Organization filing, with a status of Discontinuation. Make any necessary changes and click on **Submit Filing**.
- 7 Read the attestation and click on the **File** button to attest and file the discontinuing Statement of Organization with the Elections Division.
- 8 The committee's discontinuing Statement of Organization receives a status of 'Pending Approval' until reviewed by the Elections Division.

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