

PUBLIC FINANCING PROGRAM DOCUMENT SPECIFICATION 1.1

Table of Contents

Overview	1
Filing Types	1
Participation Form	1
Candidate's Campaign Contingency Account Form	1
Threshold Form	1
Qualifying Request Form	1
Matching Request Form	2
Requirement Indicators	2
Record Layouts	2
Header Record	3
Header Record Layout	3
Participation Form	4
Data File Records	4
Record Layouts	5
Cover Record Layout	5
Signature Record Layout	5
Amendment Record Layout	6
Full Examples	6
Initial Filing - Agree to Participate	6
Initial Filing - Decline to Participate	6
Amendment	6
Candidate Campaign Contingency Account Form	7
Data File Records	7
Record Layouts	8
Cover Record Layout	8
Account Record Layout	8
Termination Record Layout	9
Signature Record Layout	9
Amendment Record Layout	9
Full Examples	10
Initial Filing	10
Amendment	10
Termination	10
Threshold	11
Data File Records	11
Record Layouts	12
Cover Record Layout	12
Threshold Record Layout	12
Cumulative Data Record Layout	13
Signature Record Layout	13
Full Examples	13
Initial Filing	13
Second or Supplemental Filing	13

Qualifying Request Form	14
Data File Records	14
Record Layouts	15
Cover Record Layout	15
Treasurer Record Layout	16
Authorization Record Layout	16
Contribution Record Layout	17
Signature Record Layout	18
Full Example	18
Initial Filing	18
Attachments and Supporting Documentation	18
Matching Request Form	19
Data File Records	19
Record Layouts	20
Cover Record Layout	20
Treasurer Record Layout	21
Trust Account Limit Record Layout	22
Contribution Record Layout	23
Signature Record Layout	24
Full Example	24
Initial Filing	24
Attachments and Supporting Documentation	24

Overview

This document contains the design definitions for Public Financing Program forms for mayoral (SFO, BRK), board of supervisors (SFO) and city council (BRK) candidates. This format defines the order and contents of the electronic filing data files. The design definitions herein follow the practices detailed in the California Electronic Filing Format version 2.01 specification document produced by the California Secretary of State.

Filing Types

This document provides data file specifications for the following filing types:

Participation Form

The Participation form covers:

SFEC-142(a) - Statement of Participation or Non-Participation in Public Financing Program.

Berkeley - Application for Participation in Public Financing Program

Candidate's Campaign Contingency Account Form

The Contingency Account form covers:

SFEC-108 - Campaign Contingency Account

Threshold Form

The Threshold form covers:

SFEC-152(a)-1 - Notice by Candidates for Board of Supervisors of Reaching \$10,000 Threshold

SFEC-152(a)-2 - Notice by Candidates for Board of Supervisors of Reaching \$100,000 Threshold and Supplemental Notice of Reaching Each Additional \$10,000 Threshold

SFEC-152(b)-1 - Notice by Candidates for Mayor of Reaching \$50,000 Threshold

SFEC-152(b)-2 - Notice by Candidates for Mayor of Reaching \$1,000,000 Threshold and Supplemental Notice of Reaching Each Additional \$50,000 Threshold

Qualifying Request Form

The Qualifying Request form covers:

SFEC-142(b)-1 - Declaration for Public Funds by Candidates for the Board of Supervisors

SFEC-142(b)-2 - Declaration for Public Funds by Candidates for Mayor

SFEC-142(c)-1 - Qualifying Contributions List by Candidates for the Board of Supervisors

SFEC-142(c)-2 - Qualifying Contributions List by Candidates for Mayor

Berkeley - Initial Qualifying Declaration for Public Funds by Candidates for Mayor or City Council

Matching Request Form

The Matching Request form covers:

SFEC-144(c)-1 - Application for Additional Public Funds by Candidates for Mayor.

SFEC-144(c)-2 - Matching Contributions List (Mayor).

SFEC-144(d)-1 - Application for Additional Public Funds by Candidates for the Board of Supervisors.

SFEC-144(d)-2 - Matching Contributions List Board of Supervisors.

Berkeley - Declaration for Public Funds by Candidates for Mayor of City Council.

Statement by Candidate Regarding His/Her Trust Account Limit - Candidates for Mayor.

Statement by Candidate Regarding His/Her Trust Account Limit - Candidates for Board of Supervisors.

Requirement Indicators

The layouts in this document use the following requirement indicators:

R - The field is required, but SFEC accepts the filing if the field is empty.

Rx - The field is required and SFEC rejects the filing if the field is empty.

C - The field is conditionally required. When conditions dictate that the field requires data, SFEC accepts the filing if the field is empty.

Cx - The field is conditionally required. When conditions dictate that the field requires data, SFEC rejects the filing if the field is empty.

O - Optional field.

Note: Requirement indicators appear in the layout tables in the "Req" column. See ["Header Record Layout" on page 3](#) for an example.

Record Layouts

Record layout tables used throughout this document contain the following columns:

Field - Indicates the field number in the record.

Req - Displays the requirement indicator for the field. See ["Requirement Indicators" on page 2](#) for information about requirement indicators.

Field Name - The name of the field.

Max - The maximum number of characters the field allows.

Description - A short description of the value expected for the field.

Header Record

The header record is the first record in a data file and must be a comma separated value (CSV) record identified with the text "HDR" in the first field.

Header Record Layout

This header record (HDR) layout is common to all electronic filing data file types. Each data file must contain a header record and each header record must contain all of the following required fields:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	HDR - the header record type.
02	Rx	E-Filing Type	2	PF - the Public Financing e-filing type.
03	Rx	E-Filing Type Version	3	1.0 - the Public Financing e-filing type version.
04	Rx	Form Type	3	Abbreviated Name of form. Valid form abbreviations: PRT - Participation Form CCA - Campaign Contingency Account Form. QR - Qualifying Request Form MR - Matching Request Form THR - Threshold Form
05	Rx	Software Name	90	Name of software producing data file.
06	Rx	Software Version	16	Version number of software producing data file.
07	Rx	Vendor ID	50	A unique identification assigned to a the vendor by NetFile which will be used in all Public Financing API calls.
08	O	Vendor Custom	50	Allows the vendor to provide a custom value for their internal use, such as an internal tracking identifier or a filing ID.
09	Rx	Agency Identifier	7	SFO - NetFile's identifier for the San Francisco Ethics Commission.
10	Rx	Filing Date	8	CCYYMMDD date format.

Participation Form

Form Abbreviation	Data File Name	SFEC Forms Covered
PRT	PRT.cal	142(a)

Data File Records

The Participation form contains the following record types and the records must be written in the following order:

Record Type	Data File Description
HDR	<p>The Header Record is always required. See "Header Record Layout" on page 3 for a full layout of the Header Record. Example: HDR,PF,1.0,PRT,NetFile,1.0,,,SFO,20150201,CC,2018,,</p>
CVR	<p>The Cover Record is always required. This record contains filer Information and participation indicator. See "Cover Record Layout" on page 5 for a full layout of the Cover Record. Example: CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,Y</p>
SIG	<p>The Signature Record contains verification information and is always required. See "Signature Record Layout" on page 5 for a full layout of the Signature Record. Example: SIG,S90911,CAO,Forest Gump,20150202</p>
AMND	<p>The Amendment Record is required only for amendments. This record contains amendment information. See "Amendment Record Layout" on page 6 for a full layout of the Amendment Record. Example: AMND,1,393993,Some amendment description</p>

Record Layouts

Cover Record Layout

All Participation data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CVR".
02	Rx	Filer ID	9	FPPC ID issued by the Secretary of State.
03	Rx	Agency Filer ID	20	The local Filer ID (e.g., SFO-12345).
04	Rx	Committee Name	400	The name of the candidate's committee.
05	Rx	Candidate Last Name	200	Candidate's last name.
06	Rx	Candidate First Name	45	Candidate's first name.
07	O	Candidate Prefix	10	Prefix.
08	O	Candidate Suffix	10	Suffix.
09	Rx	Participate	1	Public Financing Participation: Y - Agree to participate. N - Decline to participate.
10	C	Office Sought	3	Values: MAY - Office of Mayor BOS - Board of Supervisors CCM - City Council
11	C	Election Date	8	The date of election in CCYYMMDD format.
12	C	District Number	2	The City Council District Number.

Signature Record Layout

All Participation data files must contain the Signature Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "SIG".
02	Rx	Signer ID	7	Candidate's Signer ID (e.g., S10000X).
03	Rx	Entity Code	3	Constant value "CAO" - the entity code for a candidate/officeholder.
04	Rx	Name as Signed	245	Candidate's name as signed.
05	Rx	Signature Date	8	The date signed in CCYYMMDD format.

Amendment Record Layout

Include the Amendment Record only for amendments:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "AMND".
02	Rx	Sequence Number	3	Values: 001-999 - Amended Report #1-#999.
03	Rx	Superceded Filing ID	50	The identification number of the filing that the amendment supercedes.
04	Rx	Description	100	The amendment description.

Full Examples

Initial Filing - Agree to Participate

```
HDR,PF,1.0,PRT,NetFile,1.0,,SFO,20150201
CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,Y
SIG,S90911,CAO,Forest Gump,20150201
```

Initial Filing - Decline to Participate

```
HDR,PF,1.0,PRT,NetFile,1.0,20150201
CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,N
SIG,S90911,CAO,Forest Gump,20150201
```

Amendment

```
HDR,PF,1.0,PRT,NetFile,1.0,20150301
CVR,101332,SFO-123,Gump for Mayor 2015,Gump,Forest,Mr.,Jr,Y
SIG,S90911,CAO,Forest Gump,20150301
AMND,1,393993,Corrected committee name.
```

Candidate Campaign Contingency Account Form

Form Abbreviation	Data File Name	SFEC Forms Covered
CCA	CCA.cal	108

Data File Records

The Candidate Campaign Contingency Account form contains the following record types and the records must be written in the following order:

Record Type	Data File Description
HDR	<p>The Header Record is always required.</p> <p>See "Header Record Layout" on page 3 for a full layout of the Header Record.</p> <p>Example:</p> <pre>HDR,PF,1.0,CCA,NetFile,1.0,,,SFO,20150201</pre>
CVR	<p>The Cover Record is always required. This record contains filer Information and participation indicator.</p> <p>See "Cover Record Layout" on page 8 for a full layout of the Cover Record.</p> <p>Example:</p> <pre>CVR,I,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr</pre>
ACCT	<p>The Account Record is always required. This record contains information about the candidate's campaign contingency bank account.</p> <p>See "Account Record Layout" on page 8 for a full layout of the Account Record.</p> <p>Example:</p> <pre>ACCT,20150203,0385322954,CitiBan,54992 First St.,Suite 23,Oakhurst,CA,93644</pre>
TERM	<p>The Termination Record is required only when the filer is terminating. This record contains termination information.</p> <p>See "Termination Record Layout" on page 9 for a full layout of the Termination Record.</p> <p>Example:</p> <pre>TERM,100,3.10,96.90</pre>
SIG	<p>The Signature Record contains verification information and is always required.</p> <p>See "Signature Record Layout" on page 9 for a full layout of the Signature Record.</p> <p>Example:</p> <pre>SIG,S90911,CAO,Forest Gump,20150202</pre>
AMND	<p>The Amendment Record is required only for amendments. This record contains amendment information.</p> <p>See "Amendment Record Layout" on page 9 for a full layout of the Amendment Record.</p> <p>Example:</p> <pre>AMND,1,393993,The amendment description</pre>

Record Layouts

Cover Record Layout

All Campaign Contingency Account data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CVR".
02	Rx	Filing Type	1	Values: I - Initial. A - Amendment. T - Termination.
02	Rx	Filer ID	9	FPPC ID issued by the Secretary of State.
03	Rx	Agency Filer ID	20	The local Filer ID (e.g., SFO-12345).
04	Rx	Committee Name	400	The name of the candidate's committee.
05	Rx	Last Name	200	Candidate's last name.
06	Rx	First Name	45	Candidate's first name.
07	O	Prefix (Title)	10	Prefix.
08	O	Suffix	10	Suffix.

Account Record Layout

All Campaign Contingency Account data files must contain the Account Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "ACCT".
02	Rx	Date Opened	8	Date the account was opened in CCYYMMDD format.
03	Rx	Account Number	50	The bank account number.
04	Rx	Bank Name	200	The name of the bank.
05	Rx	Bank Address Line 1	55	The first line of the address.
06	O	Bank Address Line 2	55	Optional 2nd line of the address.
07	Rx	City	30	City.
08	Rx	State	2	State code.
09	Rx	Zip Code	10	Zip+4.

Termination Record Layout

Include the Termination Record only when the candidate is filing a termination statement:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "TERM".
02	Rx	Funds Remaining	12	The balance of funds remaining in the account.
03	Rx	Cost	12	The cost of the money order, cashier's check, or written instrument.
04	Rx	Final Amount	12	Amount of funds being turned over to the Election Campaign Fund.

Signature Record Layout

All Campaign Contingency Account data files must contain the Signature Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "SIG" - the signature record type.
02	Rx	Signer ID	7	Candidate's Signer ID (e.g., S10000X).
03	Rx	Entity Code	3	Constant value "CAO" - the entity code for a candidate/officeholder.
04	Rx	Name as Signed	245	Candidate's name as signed.
05	Rx	Signature Date	8	The date signed in CCYYMMDD format.

Amendment Record Layout

Include the Amendment Record only for amendments:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "AMND".
02	Rx	Sequence Number	3	Values: 001-999 - Amended Report #1-#999.
03	Rx	Superseded Filing ID	50	The identification number of the filing that the amendment supersedes.
04	Rx	Description	100	The amendment description.

Full Examples

Initial Filing

HDR,PF,1.0,CCA,NetFile,1.0,,,SFO,20150204
CVR,I,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr
ACCT,20150203,0385322954,CitiBank,54993 First St.,Suite 23,Oakhurst,CA,93644
SIG,S90911,CAO,Forest Gump,20150204

Amendment

HDR,PF,1.0,CCA,NetFile,1.0,,,SFO,20150210
CVR,I,101332,SFO-123,Gump for Mayor 2014,Gump,Forest,Mr.,Jr
ACCT,20150203,0385322954,CitiBank,54993 First St.,Suite 23,Oakhurst,CA,93644
SIG,S90911,CAO,Forest Gump,20150210
AMND,1,888444,Corrected bank address and committee name.

Termination

HDR,PF,1.0,CCA,NetFile,1.0,,,SFO,201502701
CVR,I,101332,SFO-123,Gump for Mayor 2014,Gump,Forest,Mr.,Jr
ACCT,20150203,0385322954,CitiBank,54993 First St.,Suite 23,Oakhurst,CA,93644
TERM,100,3.10,96.90
SIG,S90911,CAO,Forest Gump,20150701

Threshold

Form Abbreviation	Data File Name	SFEC Forms Covered
THR	THR.cal	152(a)-1, 152(a)-2, 152(b)-1, 152(b)-2

Data File Records

The Threshold data file contains the following record types and the records must be written in the following order:

Record Type	Description
HDR	<p>The Header Record is always required.</p> <p>See "Header Record Layout" on page 3 for a full layout of the Header Record.</p> <p>Example:</p> <pre>HDR,PF,1.0,THR,NetFile,1.0,,,SFO,20150201</pre>
CVR	<p>The Cover Record is always required. This record contains filer Information and participation indicator.</p> <p>See "Cover Record Layout" on page 12 for a full layout of the Cover Record.</p> <p>Example:</p> <pre>CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,20151104,BOS,10</pre>
THR	<p>Use the First Threshold record to report notice of reaching the first threshold. This record contains information about the first threshold.</p> <p>See "Threshold Record Layout" on page 12 for a full layout of the Cover Record.</p> <p>Example:</p> <pre>THR,I,20150302,CTB,50000</pre>
CUM	<p>The Cumulative Data record is always required. This record contains information about contributions, expenditures and Campaign Contribution Trust Account balance.</p> <p>See "Cumulative Data Record Layout" on page 13 for a full layout of the Cover Record.</p> <p>Example:</p> <pre>CUM,10000,9956.47,12000</pre>
SIG	<p>The Signature Record contains verification information and is always required.</p> <p>See "Signature Record Layout" on page 13 for a full layout of the Signature Record.</p> <p>Example:</p> <pre>SIG,S90911,CAO,Forest Gump,20150202</pre>

Record Layouts

Cover Record Layout

All Threshold data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "CVR".
02	Rx	Filer ID	9	FPPC ID issued by the Secretary of State.
03	Rx	Agency Filer ID	20	The local Filer ID (e.g., SFO-12345).
04	Rx	Committee Name	400	The name of the candidate's committee.
05	Rx	Candidate Last Name	200	Candidate's last name.
06	Rx	Candidate First Name	45	Candidate's first name.
07	O	Candidate Prefix	10	Prefix.
08	O	Candidate Suffix	10	Suffix.
09	R	Election Date	8	The date of the election in CCYYMMDD format.
10	Rx	Office	3	The office the candidate is running for.
11	Cx	District #	2	The district number - for Board of Supervisors candidates only.

Threshold Record Layout

Threshold data files must contain at least the Threshold Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "THR".
02	Rx	Threshold Level	1	Values: I - First threshold level. S - Second or Supplemental threshold level.
03	Rx	Date Reached	8	Date threshold reached in CCYYMMDD format.
04	Rx	Threshold Exceeded	3	Values: CTB - Received Contributions. EXP - Made Expenditures.
05	Rx	Threshold Amount	12	Amount equaled or exceeded for receipts or expenditures for threshold.

Cumulative Data Record Layout

Threshold data files data files must contain the Cumulative Date Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CUM".
02	Rx	Contributions	12	The total amount of contributions (monetary, in-kind and loans) and Public Funds received to date.
03	Rx	Expenditures	12	The total amount of expenditures made or incurred to date.
04	Rx	Account Balance	12	The current balance of the Campaign Contribution Trust Account.

Signature Record Layout

All Threshold data files must contain the Signature Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "SIG".
02	Rx	Signer ID	7	Candidate's Signer ID (e.g., S10000X).
03	Rx	Entity Code	3	Constant value "CAO" - the entity code for a candidate/officeholder
04	Rx	Name as Signed	245	Candidate's name as signed.
05	Rx	Signature Date	8	The date signed in CCYYMMDD format.

Full Examples

Initial Filing

```
HDR,PF,1.0,THR,NetFile,1.0,,,SFO,20150201
CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,20151104,BOS,10
THR,I,20150302,CTB,50000
CUM,10000,9956.47,12000
SIG,S90911,CAO,Forest Gump,20150202
```

Second or Supplemental Filing

```
HDR,PF,1.0,THR,NetFile,1.0,,,SFO,20150201
CVR,101332,SFO-123,Gump For Mayor,Gump,Forest,Mr.,Jr,20151104,BOS,10
THR,S,20150302,CTB,1050000
CUM,10000,9956.47,12000
SIG,S90911,CAO,Forest Gump,20150202
```


Qualifying Request Form

Form Abbreviation	Data File Name	SFEC Forms Covered
QR	QR.cal	142(b)-1, 142(b)-2, 142(c)-1, 142(c)-2

Data File Records

The Qualifying Request data file contains the following record types and the records must be written in the following order:

Record Type	Data File Description
HDR	<p>The Header Record is always required. See "Header Record Layout" on page 3 for a full layout of the Header Record.</p> <p>Example: HDR,PF,1.0,QR,NetFile,1.0,,,SFO,20150201</p>
CVR	<p>The Cover Record is always required. This record contains filer Information. See "Cover Record Layout" on page 15 for a full layout of the Cover Record.</p> <p>Example: CVR,101332,SFO-123,Lou Seal For Mayor,Seal,Lou,Mr.,3rd,8888 Mascot St.,Suite 23,San Francisco,CA,94101,mascot@giants.com,4155551212,20151104,MAY,10</p>
TRE	<p>The Treasurer Record is always required. This record contains information about the treasurer for the candidate's committee. See "Treasurer Record Layout" on page 16 for a full layout of the Treasurer Record.</p> <p>Example: TRE,Bochy,Bruce,Coach,Sr.,Giants Dugout,7777 Parkway,San Francisco,CA,94101,bochy@giants.com,4154444212</p>
AUTH	<p>At least one Authorization Record is required. This record contains information about the person(s) authorized to receive payments from the Election Campaign Fund to the candidate. See "Authorization Record Layout" on page 16 for a full layout of the Authorization Record.</p> <p>Example: AUTH,Hensley Meulens</p>
CTB	<p>At least one Contribution Record is required. This record contains contribution information. See "Contribution Record Layout" on page 17 for a full layout of the Contribution Record.</p> <p>Example: CTB,220222,Posey,Buster,9199 Home Ave.,94556,Catcher,Giants,CHECK,20150301,20150301,5644,201.35</p>
SIG	<p>The Signature Record contains verification information and is always required. See "Signature Record Layout" on page 18 for a full layout of the Signature Record.</p> <p>Example: SIG,S90911,CAO,Forest Gump,20150202</p>

Record Layouts

Cover Record Layout

All Qualifying Request data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CVR".
02	Rx	Filer ID	9	FPPC ID issued by the Secretary of State.
03	Rx	Agency Filer ID	20	The local Filer ID (e.g., SFO-12345).
04	Rx	Committee Name	400	The name of the candidate's committee.
05	Rx	Candidate Last Name	200	Candidate's last name.
06	Rx	Candidate First Name	45	Candidate's first name.
07	O	Candidate Prefix	10	Prefix.
08	O	Candidate Suffix	10	Suffix.
09	Rx	Mailing Address Line 1	55	The first line of the address.
10	O	Mailing Address Line 2	55	Optional 2nd line of the address.
11	Rx	City	30	City.
12	Rx	State	2	State code.
13	Rx	Zip Code	10	Zip+4.
14	Rx	Candidate E-Mail	60	The candidate's e-mail address.
15	Rx	Candidate Telephone	20	The candidate's telephone number.
16	R	Election Date	8	The date of the election in CCYYMMDD format.
17	Rx	Office	3	Values: MAY - Office of Mayor BOS - Board of Supervisors CCM - City Council
18	Cx	District Number	2	The district number - for Board of Supervisor candidates only.
19	Cx	Incumbent	1	Values: Y - Incumbent N - Not incumbent Does not display on printed form.

Treasurer Record Layout

All Qualifying Request data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "TRE".
02	Rx	Treasurer Last Name	200	The treasurer's last name.
03	Rx	Treasurer First Name	45	The treasurer's first name.
04	O	Treasurer Prefix	10	Prefix.
05	O	Treasurer Suffix	10	Suffix.
06	Rx	Mailing Address Line 1	55	The first line of the address.
07	O	Mailing Address Line 2	55	Optional 2nd line of the address.
08	Rx	City	30	City.
09	Rx	State	2	State code.
10	Rx	Zip Code	10	Zip+4.
11	Rx	Treasurer E-Mail	60	The treasurer's e-mail address.
12	Rx	Treasurer Telephone	20	The treasurer's telephone number.

Authorization Record Layout

Qualifying Request data files must contain at least one Authorization Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "AUTH".
02	Rx	Authorized Representative	200	The full name of an individual authorized to pick up payments on behalf of the campaign committee.

Contribution Record Layout

Qualifying Request data files must contain at least one Contribution Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CTB".
02	Rx	Transaction Id	60	Transaction ID - permanent value unique to this item.
03	Rx	Contributor Last Name	200	The last name of the contributor.
04	Rx	Contributor First Name	45	The first name of the contributor.
05	Rx	Street Address	55	The building number, street and apartment address information.
06	O	Address Line 2	55	Optional 2nd line of the address.
07	Rx	City	30	City.
08	Rx	State	2	State code.
09	Rx	Zip Code	10	Zip+4.
10	Cx	Occupation	60	The contributor's occupation is required when cumulative contribution's equal \$100.00 or greater.
11	Cx	Employer	200	The contributor's employer is required when cumulative contribution's equal \$100.00 or greater
12	Rx	Payment Method Code	3	Payment method codes: CSH - Cash. CHK - Check. ELO - Electronic/Online. OTH - Other.
13	Rx	Date Received	8	Date contribution received in CCYYMMDD format.
14	Cx	Date Deposited	8	Date contribution deposited in CCYYMMDD format. If the Payment Method Code is CSH or CHK, this field is required. For ELO and OTH, the field is not required.
15	Cx	Deposit Batch #	100	The batch number of the bank deposit. If the Payment Method Code is CSH or CHK, this field is required. For ELO and OTH, the field is not required.
16	Rx	Contribution Amount	12	The amount of the contribution.
17	Rx	Request Amount	12	The amount of the contribution the filer requests SFEC to qualify.

Signature Record Layout

All Qualifying Request data files must contain the Signature Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "SIG".
02	Rx	Signer ID	7	Candidate's Signer ID (e.g., S10000X).
03	Rx	Entity Code	3	Constant value "CAO" - the entity code for a candidate/officeholder.
04	Rx	Name as Signed	245	Candidate's name as signed.
05	Rx	Signature Date	8	The date signed in CCYYMMDD format.

Full Example

Initial Filing

```
HDR,PF,1.0,QR,NetFile,1.0,,,SFO,19900201
CVR,101332,SFO-123,Lou Seal For Mayor,Seal,Lou,Mr.,Third,Giants Operations,8888
Mascot St.,San Francisco,CA,94101,mascot@giants.com,4155551212,19900401,MAY,42,N
TRE,Bochy,Bruce,Coach,Sr.,Giants Dugout,7777 Parkway,San
Francisco,CA,94101,bochy@giants.com,4154444212
AUTH,Hensley Meulens
AUTH,Joe Lefebvre
AUTH,Dave Righetti
CTB,22222200,Posey,Buster,9199 Home
Ave.,94556,Catcher,Giants,CHK,19900301,19900301,5644,201.35,100.00
CTB,22222201,Lincecum,Tim,84557 Pitcher
Ave.,94556,,,CSH,19900204,19900206,5644,32.01,32.01
CTB,22222202,Pence,Hunter,23422 Left Field
Ave.,94556,Outfielder,Giants,ELO,19900208,19900210,5644,203.99,100.00
```

Attachments and Supporting Documentation

Upload attachments and supporting documentation separately from the CAL file on the upload page.

Matching Request Form

Form Abbreviation	Data File Name	SFEC Forms Covered
MR	MR.cal	144(c)-1, 144(c)-2, 144(d)-1, 144(d)-2

Data File Records

The Matching Request data file contains the following record types and the records must be written in the following order:

Record Type	Description
HDR	<p>The Header Record is always required. See "Header Record Layout" on page 3 for a full layout of the Header Record.</p> <p>Example: HDR,PF,1.0,QR,NetFile,1.0,,,SFO,20150201</p>
CVR	<p>The Cover Record is always required. This record contains filer Information. See "Cover Record Layout" on page 20 for a full layout of the Cover Record.</p> <p>Example: CVR,101332,SFO-123,Lou Seal For Supervisor,Seal,Lou,Mr.,3rd,8888 Mascot St.,Suite 23,San Francisco,CA,94101,mascot@giants.com,4155551212,20151104,BOS,10</p>
TRE	<p>The Treasurer Record is always required. This record contains information about the treasurer for the candidate's committee.</p> <p>See "Treasurer Record Layout" on page 21 for a full layout of the Treasurer Record.</p> <p>Example: TRE,Bochy,Bruce,Coach,Sr.,Giants Dugout,7777 Parkway,San Francisco,CA,94101,bochy@giants.com,4154444212</p>
TAL	<p>The Trust Account Limit Record is required. See "Trust Account Limit Record Layout" on page 22 for a full layout of the Trust Account Limit Record.</p> <p>Example: TAL,120000,</p>
CTB	<p>At least one Contribution Record is required. This record contains contribution information. See "Contribution Record Layout" on page 23 for a full layout of the Contribution Record.</p> <p>Example: CTB,1246000,Posey,Buster,9199 Home Ave.,94556,Catcher,Giants,CHECK,20150301,20150301,5644,201.35</p>
SIG	<p>The Signature Record contains verification information and is always required. See "Signature Record Layout" on page 24 for a full layout of the Signature Record.</p> <p>Example: SIG,S90911,CAO,Forest Gump,20150202</p>

Record Layouts

Cover Record Layout

All Matching Request data files must contain the Cover Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CVR".
02	Rx	Filer ID	9	FPPC ID issued by the Secretary of State.
03	Rx	Agency Filer ID	20	The local Filer ID (e.g., SFO-12345).
04	Rx	Committee Name	400	The name of the candidate's committee.
05	Rx	Candidate Last Name	200	Candidate's last name.
06	Rx	Candidate First Name	45	Candidate's first name.
07	O	Candidate Prefix	10	Prefix.
08	O	Candidate Suffix	10	Suffix.
09	Rx	Mailing Address Line 1	55	The first line of the address.
10	O	Mailing Address Line 2	55	Optional 2nd line of the address.
11	Rx	City	30	City.
12	Rx	State	2	State code.
13	Rx	Zip Code	10	Zip+4.
14	R	Candidate E-Mail	60	The candidate's e-mail address.
15	R	Candidate Telephone	20	The candidate's telephone number.
16	R	Election Date	8	The date of the election in CCYYMMDD format.
17	Rx	Office	3	Values: MAY - Office of Mayor BOS - Board of Supervisors CCM - City Council
18	Cx	District Number	2	District Number.
19	Cx	Incumbent	1	Values: Y - Incumbent N - Not incumbent Does not display on printed form.

Treasurer Record Layout

All Matching Request data files must contain the Treasurer Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "TRE".
02	Rx	Treasurer Last Name	200	The treasurer's last name.
03	Rx	Treasurer First Name	45	The treasurer's first name.
04	O	Treasurer Prefix	10	Prefix.
05	O	Treasurer Suffix	10	Suffix.
06	Rx	Mailing Address Line 1	55	The first line of the address.
07	O	Mailing Address Line 2	55	Optional 2nd line of the address.
08	Rx	City	30	City.
09	Rx	State	2	State code.
10	Rx	Zip Code	10	Zip+4.
11	Rx	Treasurer E-Mail	60	The treasurer's e-mail address.
12	Rx	Treasurer Telephone	20	The treasurer's telephone number.

Trust Account Limit Record Layout

Matching Request data files must contain the Trust Account Limit Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "TAL".
02	Rx	Individual Spending Ceiling Amount	12	The Individual Spending Ceiling Amount
03	Rx	Amount Spent	12	The amount spent.
04	Rx	In-kind Contributions	12	The amount of in-kind contributions received.
05	Rx	Unpaid Bills	12	The amount of unpaid bills. This amount cannot exceed the trust account limit.
06	Rx	Campaign Contribution Trust Account Balance	12	Current balance of Campaign Contribution Trust Account.
07	Rx	Campaign Contingency Account Balance	12	Current balance of Campaign Contingency Account.
08	R	Cumulative Amount Received	12	The cumulative amount of contributions (monetary, in-kind and loans) plus public funds received.

Note: The Subtotal (Line 4 on the form) and Trust Account Limit (Line 5 on the form) are computed by the system.

Contribution Record Layout

Matching Request data files must contain at least one Contribution Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	3	Constant value "CTB".
02	Rx	Transaction Id	60	Transaction ID - permanent value unique to this item.
03	Rx	Contributor Last Name	200	The last name of the contributor.
04	Rx	Contributor First Name	45	The first name of the contributor.
05	Rx	Street Address	55	The building number, street and apartment address information.
06	O	Address Line 2	55	Optional 2nd line of the address.
07	Rx	City	30	City.
08	Rx	State	2	State code.
09	Rx	Zip Code	10	Zip+4.
10	Cx	Occupation	60	The contributor's occupation is required when cumulative contribution's equal \$100.00 or greater.
11	Cx	Employer	200	The contributor's employer is required when cumulative contribution's equal \$100.00 or greater
12	Rx	Payment Method Code	3	Payment method codes: CSH - Cash. CHK - Check. ELO - Electronic/Online. OTH - Other.
13	Rx	Date Received	8	The date the contribution was received in CCYYMMDD format.
14	Cx	Date Deposited	8	Date contribution deposited in CCYYMMDD format. If the Payment Method Code is CSH or CHK, this field is required. For ELO and OTH, the field is not required.
15	Cx	Deposit Batch #	100	The batch number of the bank deposit. If the Payment Method Code is CSH or CHK, this field is required. For ELO and OTH, the field is not required.
16	Rx	Contribution Amount	12	The amount of the Contribution.
17	Rx	Request Amount	12	The amount of the contribution the filer requests SFEC to match.

Signature Record Layout

All Matching Request documents must contain the Signature Record:

Field	Req	Field Name	Max	Description
01	Rx	Record Type	4	Constant value "SIG".
02	Rx	Signer ID	7	Candidate's Signer ID (e.g., S10000X).
03	Rx	Entity Code	3	Constant value "CAO" - the entity code for a candidate/officeholder.
04	Rx	Name as Signed	245	Candidate's name as signed.
05	Rx	Signature Date	8	The date signed in CCYYMMDD format.

Full Example

Initial Filing

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HDR,PF,1.0,THR,NetFile,1.0,,,SFO,20150201
CVR,101332,SFO-123,Lou Seal For
Supervisor,Seal,Lou,Mr.,3rd,mascot@giants.com,4155551212,20151104
TRE,Bochy,Bruce,Coach,Sr.,Giants Dugout,7777 Parkway,San
Francisco,CA,94101,bochy@giants.com,4154444212
TAL,1475000,72188,7812,32000,5000,4000,90000
CTB,1246000,Posey,Buster,9199 Home Ave.,San
Francisco,CA,94556,Catcher,Giants,CHK,20150301,20150301,5644,201.35
SIG,S90911,CAO,Forest Gump,20150202
```

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