

Electronic Disclosure System (EDS) for Donors/Third Parties and their Agents

FOR LOCAL GOVERNMENT ELECTIONS AND BY-ELECTIONS

USER GUIDE



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1. Introduction

1.1 Overview of the Act and Regulation

This user guide is intended for donors and third parties participating in local government elections who are required to comply with the financial disclosure provisions of the *Local Government Electoral Act 2011* (the Act) and the Local Government Electoral Regulation 2023 (the Regulation).

1.2 Disclaimer

Publications by the Electoral Commission of Queensland (ECQ) are not intended as a substitute for the Act or Regulation. Donors and third parties are advised to obtain a copy of the Act and Regulation, and if necessary, seek independent legal advice. The Act and Regulation are available online at www.legislation.qld.gov.au.

1.3 Contacting the ECQ

Please contact the ECQ's Funding and Disclosure Unit for general enquiries and assistance. Our details are set out below:

Postal address: GPO Box 1393

BRISBANE QLD 4001

Office location: Level 20, 1 Eagle Street, Brisbane, Queensland

Telephone: 1300 881 665

Email: fad@ecq.qld.gov.au

Internet: www.ecq.qld.gov.au

2. Glossary

Please see below for key terms used throughout this user guide and their definitions.

Agent

Some third parties are required to appoint an agent. The agent is responsible for, amongst other things, lodging returns on behalf of the third party.

Refer to local government <u>Fact sheet 38 - Funding and disclosure overview for agents</u> for more information about agents.

Disclosure Due Date

All third parties or their agents required to disclose gifts, loans and electoral expenditure must give the ECQ a return in real-time (i.e., within 7 business days of the gift or loan being received or the expenditure being incurred).

All third parties or their agents must also lodge an election summary return within 15 weeks after the election. This return must state the total value of gifts or loans made or received and all electoral expenditure incurred during the relevant disclosure period.

Refer to local government <u>Fact sheet 35 – Real-time disclosure of gifts received by</u>
<u>third parties</u> and <u>Fact sheet 34 - Real-time disclosure of electoral expenditure by third</u>
parties for more information about disclosure due dates.

Disclosure Period

The disclosure period for a third party usually begins 30 days after the polling day for the last quadrennial election and ends 30 days after the polling day for the current quadrennial election.

Electoral Expenditure

Electoral expenditure includes the following, if incurred for a campaign purpose:

 costs of designing, producing, printing, broadcasting, or publishing any kind of material for an election including (but not limited to):

- advertisements broadcast at a cinema, on radio or television or on the internet
- o direct marketing through the post office or email
- o flyers, billboards, brochures, signs, or how-to-vote cards
- distribution costs for election material such as the cost of postage, couriers, or sending SMS messages
- · costs of opinion polling or research
- fees for contracted services related to an activity mentioned above (e.g., payments for experts or consultants, the provision of data, etc.)

Expenditure is incurred for a campaign purpose if it is incurred to promote or oppose a candidate, group of candidates or political party, or to otherwise influence voting, in an election.

Refer to <u>Local government fact sheet 12 – Definition of electoral expenditure</u> for more information on electoral expenditure.

Gifts

The transfer of money, property or a service given without receiving something of equal or adequate value in return. Gifts can include money or services provided by friends, family, or other persons or businesses which have a personal relationship with the recipient.

A non-monetary gift (or gift-in-kind) is a gift of any goods or services other than money.

A gift can be:

- monetary or non-monetary
- services provided at no or below cost
- electoral expenditure gifted to an election participant
- uncharged interest on a loan
- any part of a fundraising contribution that exceeds \$200

A gift does not include:

- an amount transferred from an individual's own funds (e.g., from a personal bank account) to the individual's own dedicated campaign bank account
- an amount contributed from an account an individual holds jointly with their spouse to the individual's own dedicated campaign bank account
- volunteer labour (e.g. a family member handing out flyers on election day)
- the incidental use of a volunteer's vehicle or equipment
- a fundraising contribution of \$200 or less
- membership fees paid to a political party
- property transferred under a will
- a gift made in a private capacity that is for the personal use of an individual,
 unless the gift is later used for an electoral purpose.

Refer to local government <u>Fact sheet 9 – Disclosure of gifts made</u>, <u>Fact sheet 10 – Definition of gifts and loans</u> and <u>Fact sheet 35 – Real-time disclosure of gifts received by third parties</u> for more information.

Loans

A loan is any of the following provided by a person or entity, other than a financial institution or by use or a credit card:

- an advance of money
- provision of credit or other form of financial accommodation
- payment of an amount for, on behalf of, or at the request of an entity, if there is an express or implied obligation to repay the amount
- another transaction that is, in effect, a loan of money.

Loans received from financial institutions do not need to be disclosed.

Further information about key terms and definitions can also be found in the <u>Local</u> <u>Government Electoral Act 2011</u> and the <u>Local Government Electoral Regulation</u> <u>2023</u>.

3. Signing into the Self Service Portal

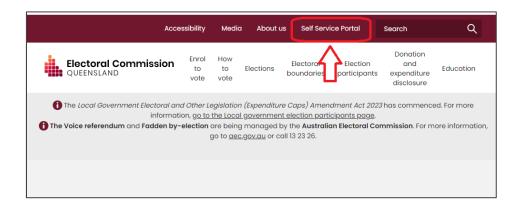
To access the Electronic Disclosure System (EDS) and lodge returns as a donor or third party, you first need to log into the ECQ's Self Service Portal (SSP) and set up your profile.

Please use the following instructions to create an account.

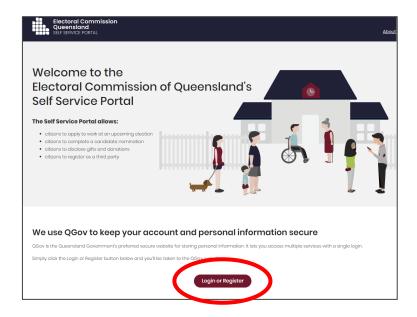
Note: if you already have an SSP account, you can skip to part 4 of this user guide.

 Visit the ECQ's website at <u>www.ecq.qld.gov.au</u> and select the Self Service Portal link at the top of the page.

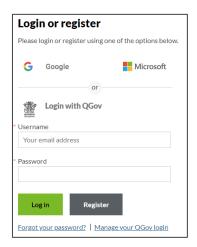
Or access the SSP directly at selfserv.elections.qld.gov.au.



2. Choose Login or Register.



If you already have a QGov account, you can log in and skip to step 6.
 Otherwise select Register.



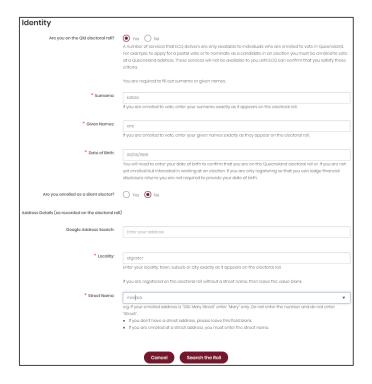
4. Enter your email as username, create a password and agree to the terms and conditions before choosing **Continue**.



Retrieve your confirmation code from your email and enter it here.
 If you didn't receive a confirmation code, please contact Shared Services
 Queensland on 13 74 68.



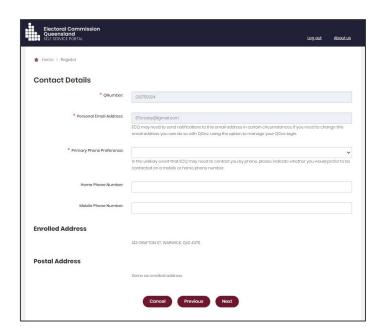
- 6. You will be directed to the log in screen. Enter your new username and password and select **Log in**.
 - After logging in, choose **Continue** to be redirected to SSP.
- 7. On the Identity page, enter your information into all mandatory fields then select **Search the Roll**.



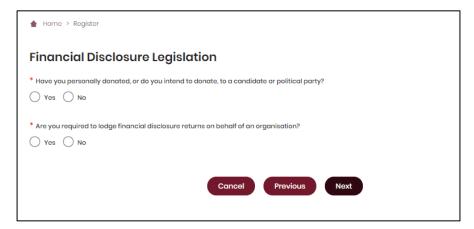
Did you get an error message? Here are some possibilities to check:

- Do not enter the street suffix in the Street Name field (no St, Ave, Ln, etc).
- If you receive the error message 'No entry was found on the Queensland electoral roll matching these details,' please double check that everything has been entered correctly.
- If you continue to receive that error, visit the Australian Electoral
 Commission's website at check.aec.gov.au to ensure your enrolment details
 are up to date. You can create your SSP profile using old details, and once the
 AEC has updated their roll, the ECQ will be automatically notified.
- If you are not on the Queensland electoral roll (maybe you are under 18 or enrolled in another state), please select No for the question Are you on the Qld electoral roll.

8. Enter your contact details and choose Next.
If your address has been verified against the electoral roll, your address will be prefilled and so not able to be edited. If you need to change these details, please visit the AEC at aec.gov.au.

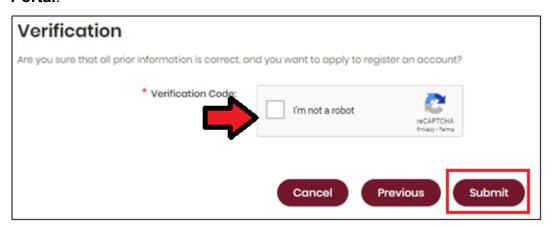


- 9. On the Financial Disclosure Legislation page, which options you choose depends upon your role in the elections:
 - If you will be lodging returns as an individual donor or third party,
 answer Yes to the first question.
 - If you are required to lodge return on behalf of an organisation that is a
 donor, third party, publisher, broadcaster or associated entity, answer
 Yes to the second question.



If you choose **Yes** for the first question, you will be prompted to enter your occupation and industry.

10. If asked for verification, tick the box stating 'l'm not a robot.' If you are a robot, please close the browser. You will then be redirected to the Self Service Portal.



11. If you are lodging returns as an individual donor / third party, skip to step 16.

If you are lodging returns on behalf of an organisation, you will be asked to supply the details of the organisation that you represent.

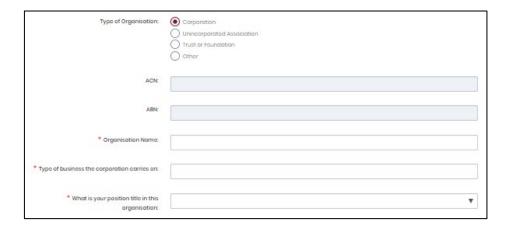
Please agree to the privacy policy and prohibited donors notification.



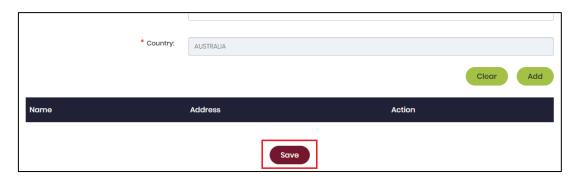
12. If your organisation has an ACN or ABN, please choose **Yes** and validate the relevant number.



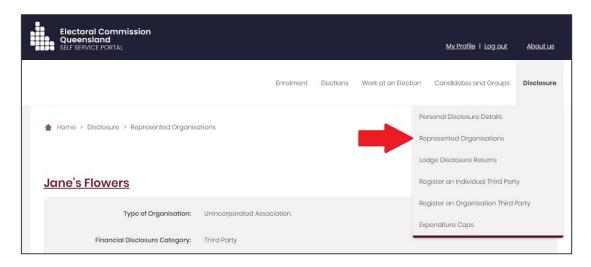
13. Choose the type of organisation you are representing and complete the required fields.



14. After completing all required fields, you can choose Save to add the organisation to your SSP profile.



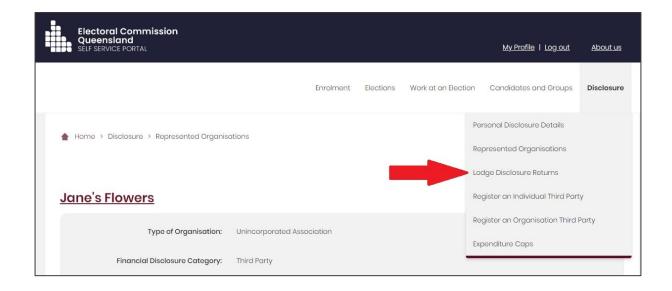
15. You can view and edit the organisations you represent in SSP at any time by opening the **Disclosure** dropdown menu at the top right of the screen then choosing **Represented Organisations**.



New organisations can be added by choosing the **Add New** button at the top right. To edit an existing organisation's details, choose the **Edit** button opposite the organisation's name or select the organisation's name to see the full details and choose **Edit** at the bottom of the screen.



16. You can now lodge returns in EDS by opening the **Disclosure** dropdown menu in the top right then choosing **Lodge Disclosure Returns**.



4. Registering your third party

If your third party incurs or is planning to incur \$6000 or more in electoral expenditure during the capped expenditure period for a local government election, you must register the third party with the ECQ. Both organisations and individuals can be registered as third parties.

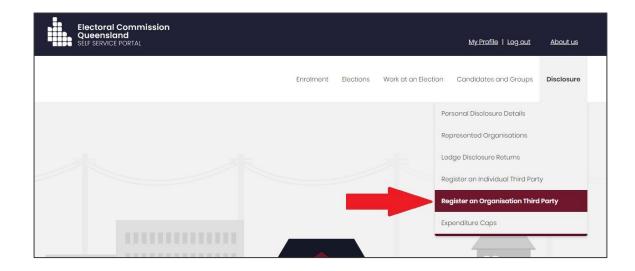
For further information refer to local government fact sheets 31 & 32 at ecq.qld.gov.au/factsheets.

To register a third party, please sign into SSP and follow the instructions blow.

Register as an organisation if you are incurring electoral expenditure on behalf of an organisation whether a trust, corporation, foundation or another type of organisation. Register as an individual third party if you personally incur electoral expenditure.

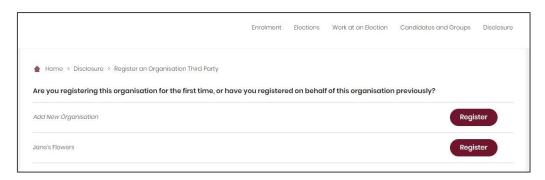
4.1 Registering an organisation third party

 When you're logged into SSP, open the **Disclosure** dropdown menu in the upper righthand corner of the page then choose **Register an Organisation Third Party**.



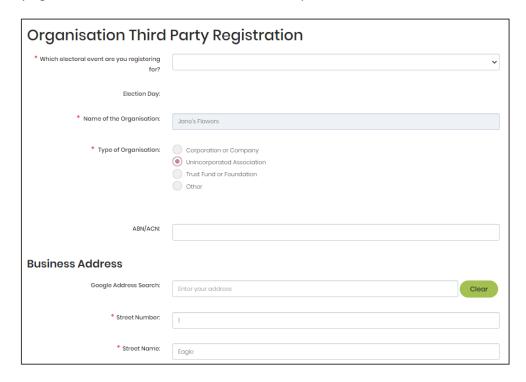
If you have already informed the ECQ that you will be lodging returns on behalf of an organisation, select **Register** next to the name of the organisation.

Otherwise select Register next to Add New Organisation.

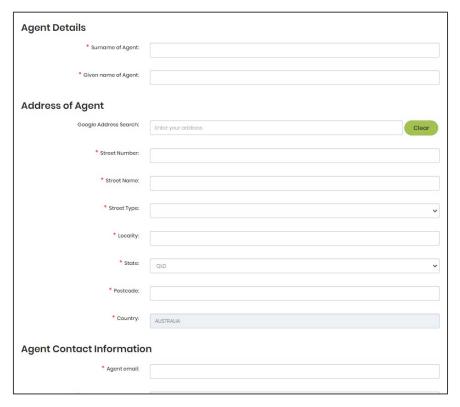


3. If you've already entered information for an organisation, that information will be pre-filled on the registration page. If the information is not pre-filled, you will need to provide the name, type, and business address of the organisation. If the organisation has an ABN or ACN, enter the number.

Use the dropdown menu to select the election event you are registering for. (e.g., 2024 Local Government Elections)



4. Continue down the registration page to name an agent for your third party. (All registered third party organisations must name an agent to be responsible for ensuring compliance obligations are met. For more information, refer to local government Fact Sheet 38 – Funding and disclosure overview for agents at ecq.qld.gov.au/factsheets).



If you are naming yourself as agent for the organisation, be sure to enter the same email address that you used to sign into SSP as the agent email.

5. You and the nominated agent for the organisation need to sign the third party registration form before it can be submitted. To do this, choose the **Print** button at the bottom of the registration page. (The **Upload** button will only be available after you have printed the form.)

Agent Contact Information				
* Agent email:				
* Agent phone number:				
You must print, sign and upload the application form before it can be submitted.				
	Print Upload Submit			

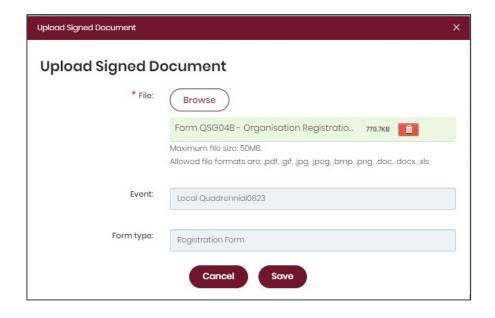
After choosing **Print**, a tab or window called Application to register a third party (organisation) will open. The form is automatically filled out with your third party's details. The agent and contact person of the third party need to sign the form electronically or by printing it out and signing it. (The agent and contact person can be the same individual.) Be sure to save the form after signing.



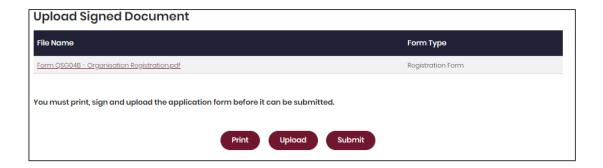
6. Once the form has been signed and saved, you can go back to the previous tab or window and choose the **Upload** button.



7. Browse to the saved file on your device and choose it to upload to SSP.

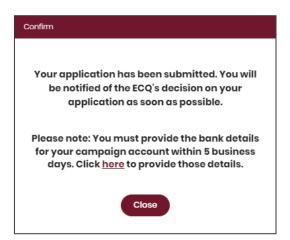


8. With the form uploaded and showing under the heading Upload Signed Document, you can choose the **Submit** button to lodge your application to register a third party.



When asked to confirm if you're sure you want to submit your application, choose **Yes**.

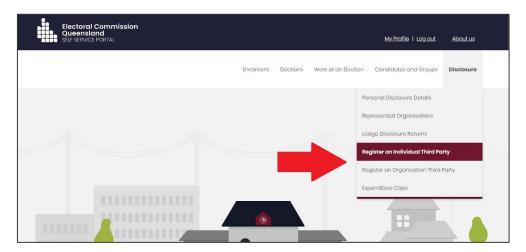
Select Close to finalise registration or here to add your bank details. All
registered third parties must provide bank details for their dedicated
campaign bank account within 5 business days of submitting the application.



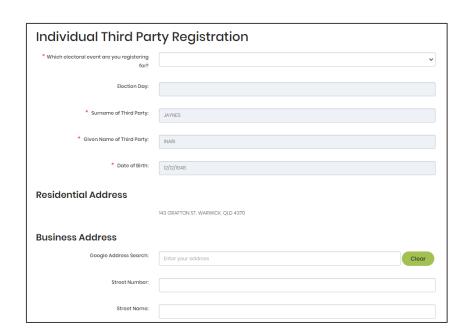
10. For assistance adding your bank details, go to <u>section 4.3 Add dedicated</u> campaign bank account details.

4.2 Registering as an individual third party

1. When you're logged into SSP, open the **Disclosure** dropdown menu in the upper righthand corner of the page then choose **Register an Individual Third Party**.

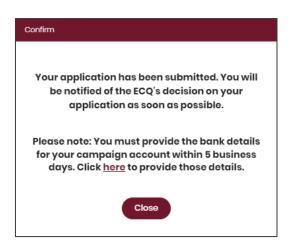


2. Some of the information in the Individual Third Party Registration form will be prefilled from the electoral roll. Be sure to choose the election event (e.g., 2024 Local Government Elections) from the dropdown menu at the top of the page.



After filling out all the required fields, choose **Submit** at the bottom of the page.

3. Select **Close** to finalise registration or **here** to add your bank details. All registered third parties must provide bank details for their dedicated campaign bank account within 5 business days of submitting the application.



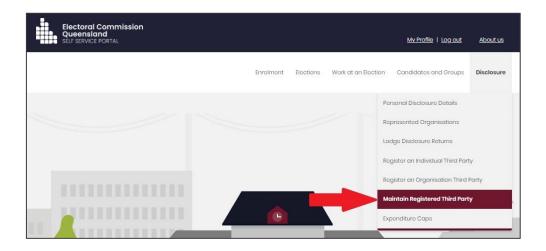
4. For assistance adding your bank details, go to <u>section 4.3 Add dedicated</u> <u>campaign bank account details</u>.

4.3 Add dedicated campaign bank account details

All registered third parties must register the details of their dedicated campaign bank account with the ECQ within 5 business days of submitting their registration.

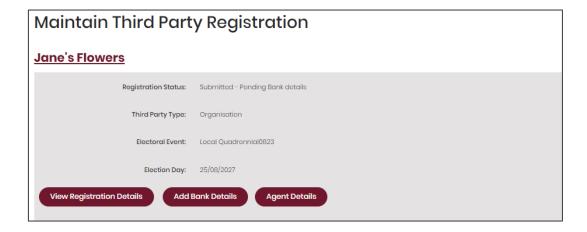
For more details about dedicated campaign bank accounts, please refer to local government Fact Sheet 33 – Dedicated campaign bank accounts for third parties at ecq.qld.gov.au/factsheets.

1. From the main page of SSP, select the **Disclosure** dropdown menu and choose **Maintain Registered Third Party**.

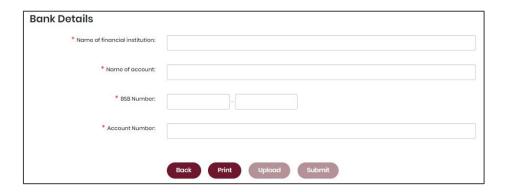


2. On the Maintain Third Party Registration page, you will see the details of your registered third party.

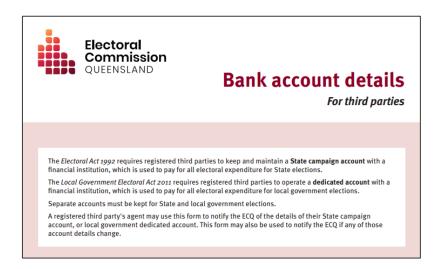
Choose the **Add Bank Details** button under the third party details.



3. Enter your bank account information in the boxes provided then choose the **Print** button at the bottom of the page.



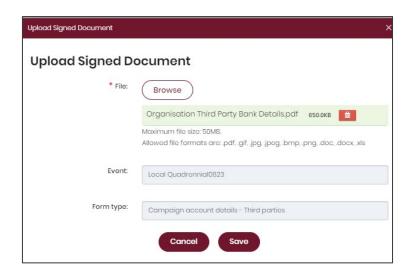
4. After choosing **Print**, a tab or window called Bank account details for third parties will open. The form is automatically filled out with your third party and bank account details. You can sign the form electronically or by printing it out and signing it. Be sure to save the form after signing.



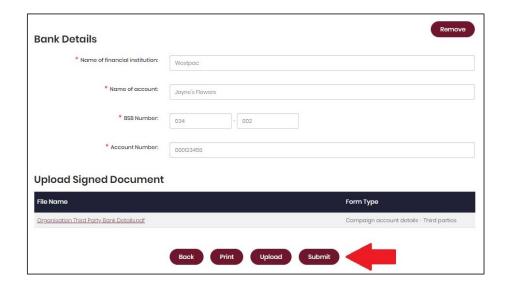
5. Once the form has been signed and saved, you can go back to the previous tab or window and choose the **Upload** button.



6. Use the **Browse** button to navigate to and select the saved file on your device to upload to SSP. Choose **Save**.



7. With the form uploaded and showing under the heading Upload Signed Document, you can choose the **Submit** button to finish adding your bank details.



8. Congratulations on registering your third party and adding your dedicated campaign bank account details!

5. Logging into EDS

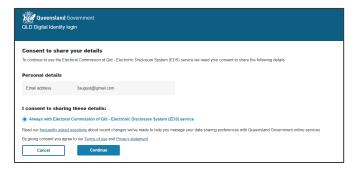
Once you have registered in SSP (see <u>section 3</u>), you can log into EDS at any time by using the following instructions.

You can access EDS directly at <u>disclosures.ecq.qld.gov.au</u>.
 Choose the **Login/Register** link in the top right-hand corner.

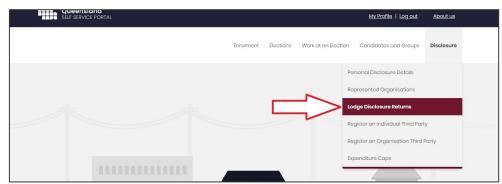


You will login using the same QGov username (email address) and password that you use for SSP.

2. The first time you access EDS, you will be asked to consent to share your details with the ECQ. Choose **Continue**.



You can also access EDS by logging into SSP and opening the **Disclosures**dropdown menu in the upper righthand corner. Choose **Lodge Disclosure**Returns and you will be automatically directed to EDS.



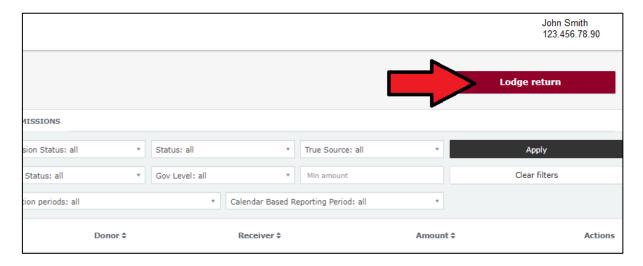
6. Disclosing gifts made

A person or organisation that makes a gift of \$500 or more to or for the benefit of a candidate, a group of candidates, a registered political party or another third party must lodge a return with the ECQ within 7 business days.

Gifts are cumulative. It does not matter if a gift was made in small amounts or all at once. Once the threshold of \$500 is met, all previous and future gifts to the same election participant must be disclosed.

To lodge a return for a gift made to a participant in a local government election, please use the following instructions.

 Begin lodging a return by choosing the maroon Lodge return button in the upper right corner of EDS.



2. Under Type of Obligation, select **Local Government**.

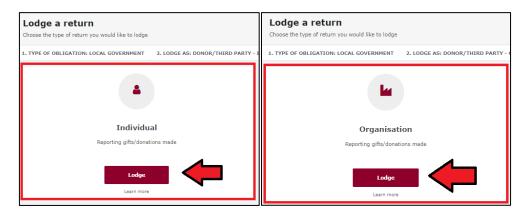


If you are lodging a return as an individual, choose Donor/Third Party –
 Individual.

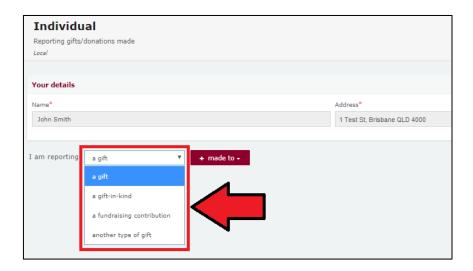
If you are lodging on behalf of an organisation, choose **Donor/Third Party – Organisation**.



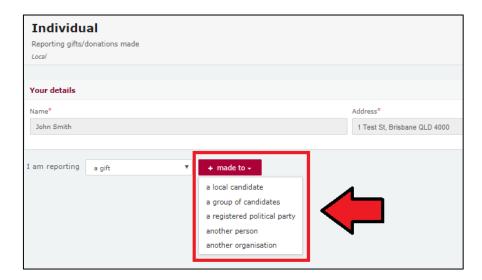
4. Choose the **Lodge** button under Reporting gifts/donations made.



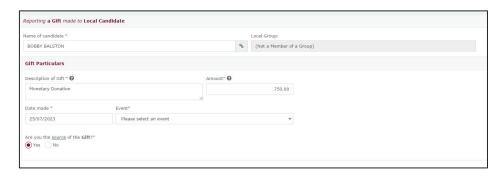
5. Your details will be pre-filled. Select the gift type using the **I am** reporting dropdown menu (e.g., a gift).



Choose who you or your organisation made the gift to (e.g., a local candidate or a registered political party).



7. Complete all mandatory fields.



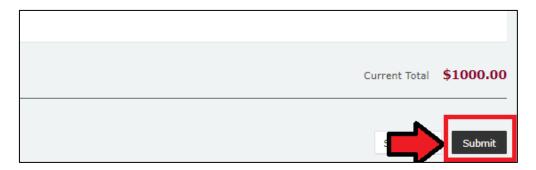
Additional gifts can be disclosed in the same return by using the dropdown menus at the bottom of the page and repeating the steps above.

8. You can save a draft copy of your return at any time by selecting Save draft.

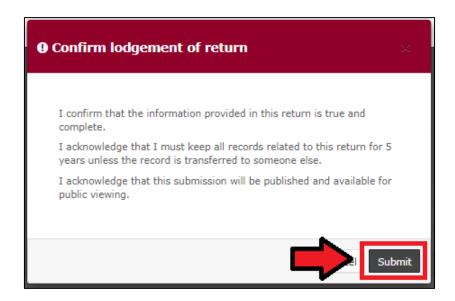


You can access your draft returns by choosing **Drafts** in the side menu.

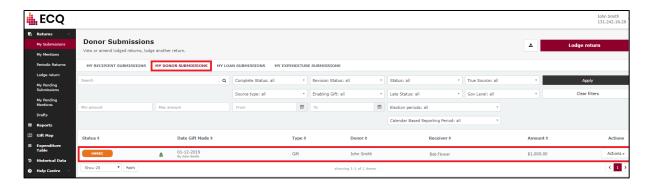
9. Choose the **Submit** button to lodge your return.



10. Choose **Submit** again to confirm the information in your return is correct.



11. Your return will appear in your My Donor Submissions page as well as on the public Gift Map and Reports pages.



If the recipient is required to lodge a corresponding return, the status of your return will appear as 'UNREC' ('Unreconciled'). Otherwise, the status of your return will appear as 'NCR' ('No Corresponding Return') to signify that a corresponding return from the recipient is not required.

7. Disclosing electoral expenditure incurred

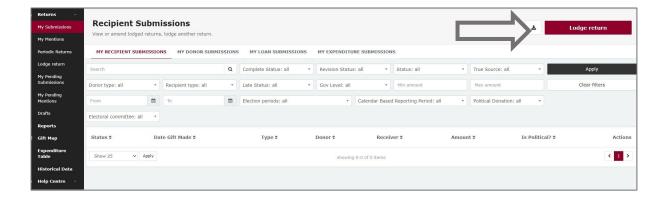
Registered third parties and donors (or those who should be registered) who incur electoral expenditure totalling \$500 or more are required to disclose the details of the expenditure in a return.

Electoral expenditure can be disclosed individually (see <u>section 7.1</u>) or using a bulk upload spreadsheet (see <u>section 7.2</u>).

Note: use the bulk upload spreadsheet for disclosing many expenditure items in one transaction.

To lodge a return for electoral expenditure in EDS, please use the following instructions. You can access EDS by logging into SSP as above then choosing **Lodge Disclosure Returns** in the upper righthand corner or by visiting <u>disclosures.ecq.qld.gov.au</u> and choosing login in the upper righthand corner. You will use the same QGov username (email address) and password as you use for SSP.

When you are logged into EDS, you will see the below screen. To begin lodging a return, choose the maroon **Lodge return** button in the upper right corner.



7.1 Disclosing electoral expenditure individually

To lodge a return for individual items of electoral expenditure, please use the following instructions.

1. Under Type of Obligation, select Local Government.

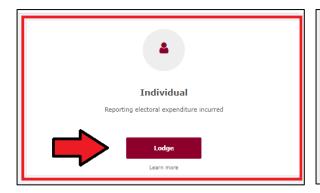


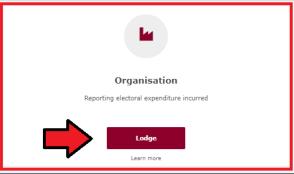
2. If you are lodging a return as an **individual**, choose **Donor/Third Party – Individual**.

If you are lodging on behalf of an **organisation**, select **Donor/Third Party – Organisation**.



3. On the Lodge a Return page, select the **Lodge** button in the Individual (or) Organisation: Reporting electoral expenditure incurred box.

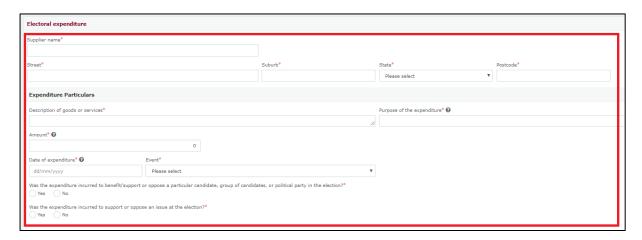




4. In the + Add new item dropdown menu, choose **Electoral expenditure**.



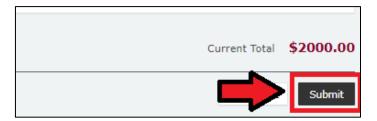
5. Please complete all mandatory fields (marked with a red asterisk).



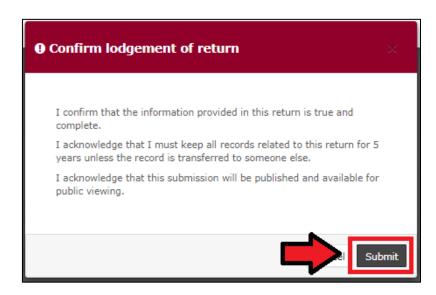
You can disclose additional items of electoral expenditure in the same return by clicking the **+ Add new item** button at the bottom of the page and repeating the steps above.

6. A draft of your return can be saved at any time but choosing the **Save Draft** button. Your previously saved drafts can be found under 'Drafts' in the side menu.

7. Choose **Submit** to lodge your return.

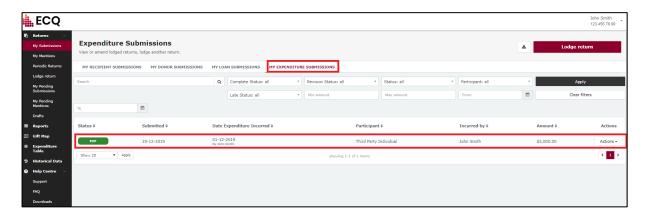


8. Choose **Submit** again to confirm the information contained in the return is correct.



 The electoral expenditure will display on the Recipient Submissions page under the My Expenditure Submissions tab, as well as on the public Expenditure Table and Reports pages.

Electoral expenditure **Status** will display as EXP (expenditure) to signify that electoral expenditure has been disclosed.



7.2 Disclosing electoral expenditure using a bulk upload spreadsheet

To lodge a return for multiple items of electoral expenditure using a bulk upload spreadsheet, please use the following instructions.

1. On the Type of obligation page, select **Local Government**.

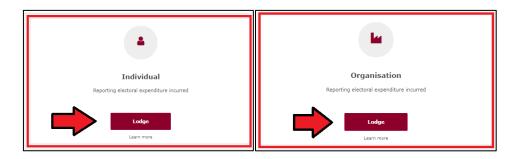


2. If you are lodging a return as an **individual**, choose **Donor/Third Party – Individual**.

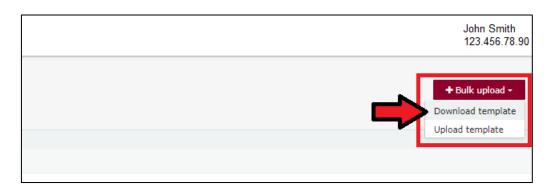
If you are lodging on behalf of an **organisation**, select **Donor/Third Party – Organisation**.



3. On the Lodge a Return page, select the **Lodge** button in the 'Individual (or) Organisation: Reporting electoral expenditure incurred' box.



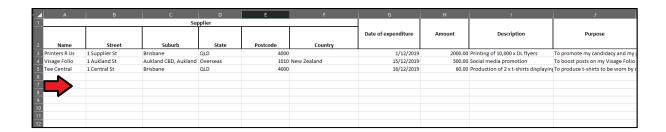
4. To enter multiple expenditure items at once, choose **+Bulk Upload** then select **Download template** from the dropdown menu.



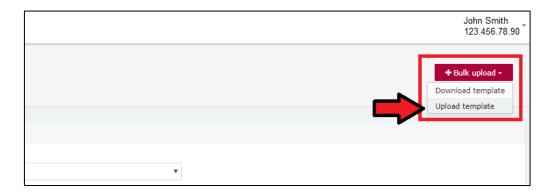
5. Once downloaded, open the Excel file.

Note:

- Google Chrome downloads generally appear in the lower left of the page.
- Internet Explorer downloads generally appear in a pop-up box.
- Apple Safari downloads are available in the download icon in the lower right of the screen.
- 6. When you have the excel file open, be sure to **Enable Editing** then enter mandatory fields, such as supplier name and address, description of goods or services, purpose of expenditure, amount and date.
 - Be sure to enter data from the top row. Leaving the top rows blank may cause errors when you upload the template to your return.
 - Please do not change, add or remove any of the spreadsheet's headings or columns. The template will not upload properly if these are changed. This includes wording pasted from a different document – it must match the options available from any drop-down lists in the template (e.g. State).
 - Country is only required for overseas addresses.



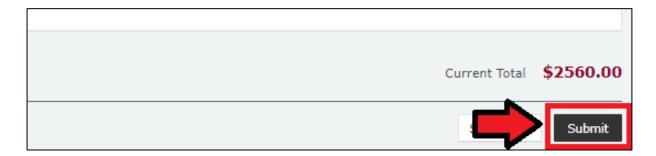
- 7. Once you have entered all expenditure items into the spreadsheet, save the file to a safe location on your device.
- 8. When you're ready to upload the spreadsheet, navigate back to 'Lodge your return' and choose **+ Bulk upload**. You can then select **Upload template** from the dropdown menu.



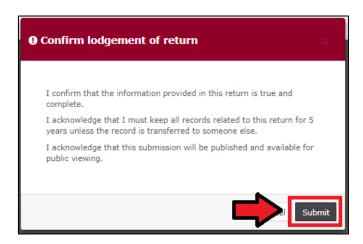
- 9. Select the file to upload and then select **Next**.
- 10. A draft copy of your return can be saved at any time by choosing the **Save Draft** button.

You can access your draft returns by opening **Drafts** from the left-hand menu.

11. Select the **Submit** button to lodge your return.

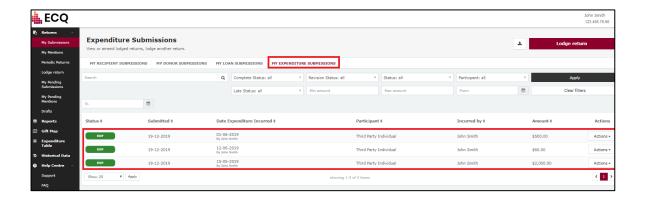


12. Choose **Submit** again to confirm the information provided in the returns is accurate.



13. The electoral expenditure items will display on the Recipient Submissions page under the My Expenditure Submissions tab, as well as on the public Expenditure Table and Reports pages.

Note: electoral expenditure **Status** will display as EXP (meaning expenditure) to signify that electoral expenditure has been disclosed.



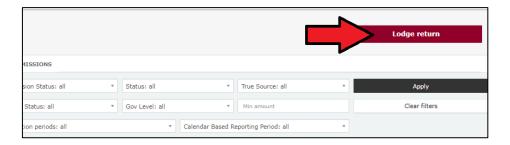
8. Disclosing a gift received in EDS

Donors or third parties who receive gifts of \$500 or more are required to disclose the details of the gift in a return if they use it to incur or reimburse political expenditure in a local government election.

Political expenditure includes expenditure incurred in the form of electoral expenditure or gifts made to a participant in the election.

To lodge a return for a gift received, please use the following instructions.

1. Choose **Lodge return** from the Submissions page in EDS.

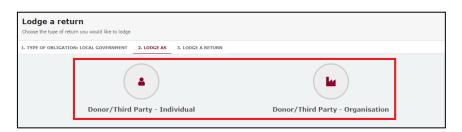


2. On the Type of Obligation page, choose Local Government.

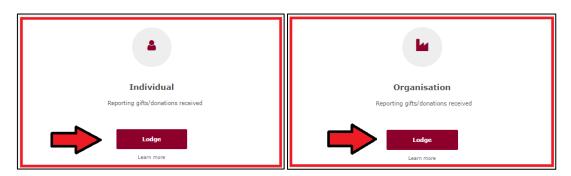


 If you are lodging a return as an individual, choose Donor/Third Party – Individual.

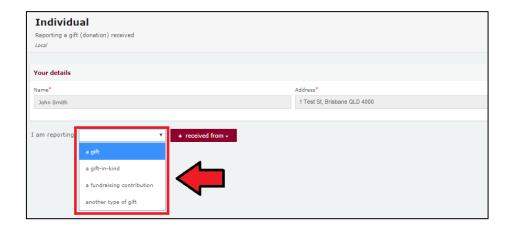
If you are lodging on behalf of an **organisation**, select **Donor/Third Party – Organisation**.



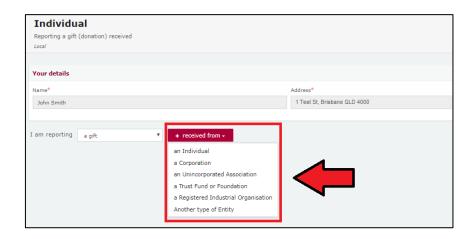
4. On the Lodge a Return page, select the **Lodge** button in the Individual (or) Organisation: Reporting gifts/donations received box.



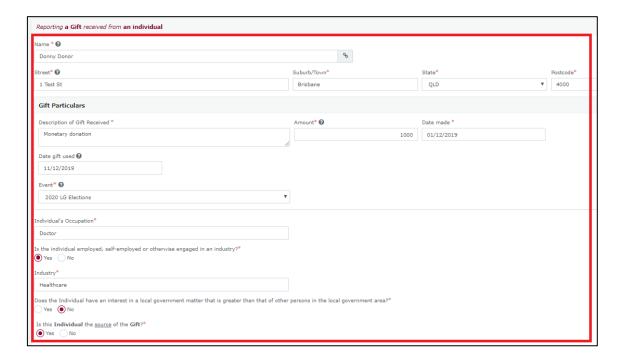
5. From the dropdown menu, choose the type of gift received. (e.g., a gift-in-kind or a fundraising contribution)



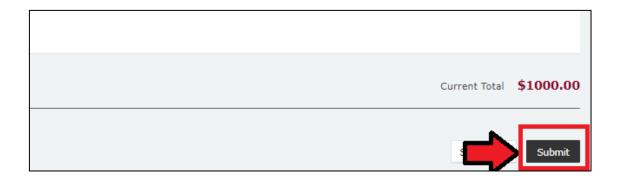
6. Choose the donor type from the **+ received from** dropdown menu.



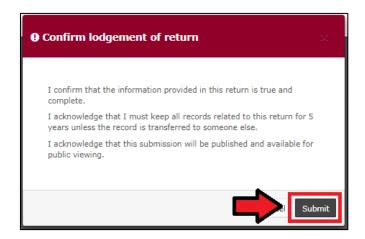
- 7. Enter all mandatory gift reporting information, such as name and address of the entity giving the gift, description of gift received, amount and date made.
 - Depending on the person or entity who gave the gift, you may be required to
 enter additional information. <u>Fact sheet 11 Relevant details of gifts and
 loans</u> has further information about what may be required.
 - Additional gifts can be disclosed by selecting options from I am reporting and + received from and repeating the steps above.



8. When finished, choose **Submit**. If you want to complete this return later, you can choose **Save Draft** at any time. Previously saved drafts can be found under Drafts in the side menu.

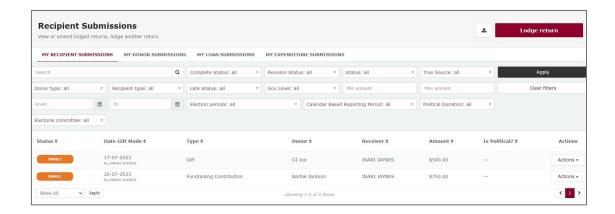


9. To confirm the information in your return is correct, select **Submit** again.



10. The gift received will display on the Recipient Submissions page under the My Recipient Submissions tab.

Note: if the gift reported is more than \$500 (cumulative from each donor or singular), the received **Status** will display as UNREC (unreconciled) until donor lodges a corresponding return.



9. Submitting an election summary return

Donors and third parties are required to lodge an election summary return within 15 weeks of election day if they:

- make gifts of \$500 or more to a local government election participant
- receive gifts of \$500 or more that enable them to incur political expenditure
- are registered as a third party for the election.

Political expenditure includes expenditure incurred in the form of electoral expenditure or gifts made to a participant in the election.

In this return, you are required to disclose the total value of any gifts you made, the total value of any gifts you received, and the total number of entities that made those gifts. For registered third parties, you are also required to disclose the total value of electoral expenditure you incurred.

Unregistered third parties will find instructions for submitting an election summary return on the next page. Registered third parties can proceed to <u>section 9.2</u>.

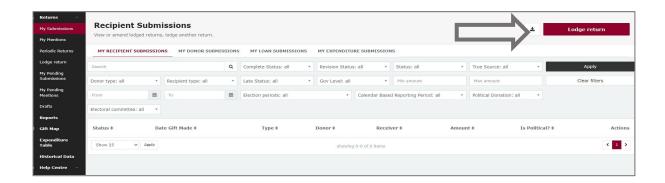
<u>Important:</u> Prior to submitting your election summary return, you must lodge a separate return in EDS for:

- each gift of \$500 or more (cumulatively) you made to an election participant during the election (see <u>section 6</u>)
- each amount of electoral expenditure you incurred for the election (see section 7)
- each gift of \$500 of more (cumulatively) you received and used for political expenditure (see <u>section 8</u>).

9.1 Submitting an election summary return as an unregistered third party

To lodge your election summary return, please use the following instructions.

1. From the My Submissions page of the EDS, choose Lodge Return.

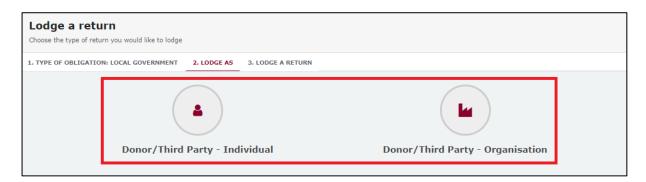


2. On the Type of Obligation page, select **Local Government**.

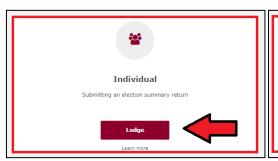


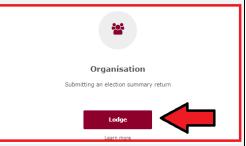
 If you are lodging a return as an individual, choose Donor/Third Party – Individual.

If you are lodging on behalf of an **organisation**, select **Donor/Third Party – Organisation**.

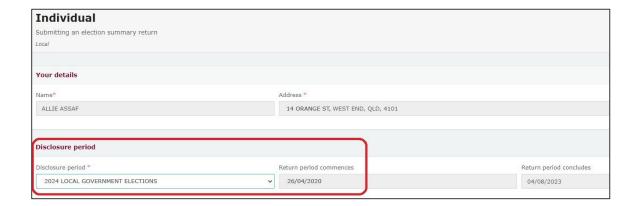


4. On the Lodge a Return page, select the **Lodge** button in the Individual or Organisation Submitting an election summary return box.



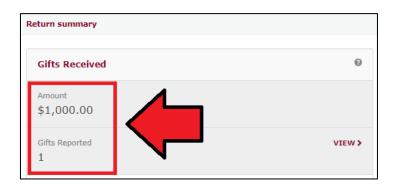


5. In the **Disclosure period dropdown menu**, choose the local government election for which you're filing the summary return. The Return period commences and Return period concludes fields will automatically fill in the appropriate dates.

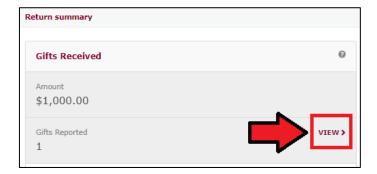


- 6. If your third party received no gifts, proceed to step 8. Otherwise continue to step 7.
- 7. The Return Summary section includes a summary of all the gifts you received for the election that were used to incur political expenditure.

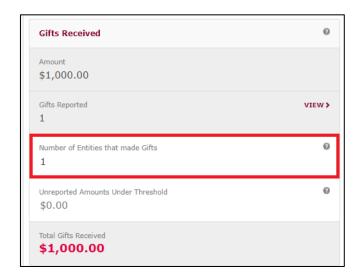
The Amount and Gifts Reported fields will display the total amount and number of any gifts that you have already reported in EDS using the instructions in section 8.



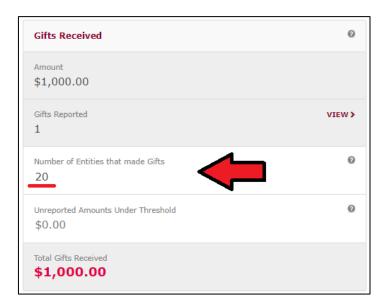
The gifts you have already reported in EDS can be reviewed by selecting the **View** button.



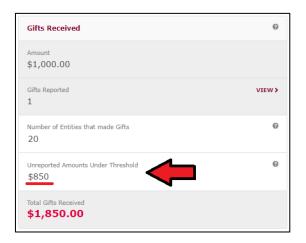
The **Number of Entities that made Gifts** field is prefilled based on any gifts that you have already reported in EDS.



You should update this field to reflect the total number of entities that made gifts to your third party during the disclosure period. This includes any entities that made gifts of less than \$500.



The **Unreported Amounts Under Threshold** field is also editable, and should be updated with the total value of any gifts that you received of less than \$500 that have not already been reported in EDS.

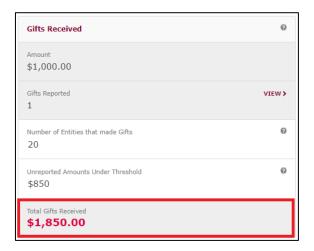


For example: You received a \$1,000 gift from a donor, which you used to incur political expenditure for the election. You have already reported this gift in EDS in a separate return (as in <u>section 8</u>). This gift will appear

automatically in the Amount and Gifts Reported fields of your election summary return.

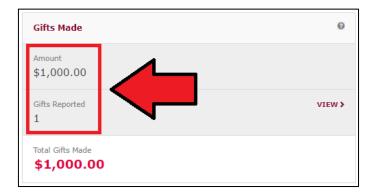
However, you also received several smaller gifts from 19 other donors which totalled \$850. In the **Number of Entities that made Gifts** field, you will need to update the number from 1 to 20. In the **Unreported Amounts Under Threshold** field, you will need to update the amount from \$0.00 to \$850.00.

The **Total Gifts Received** field should reflect the total amount of gifts you received that were used to incur political expenditure for the election. It is calculated based on the sum of the **Amount** and the **Unreported Amounts Under Threshold**.

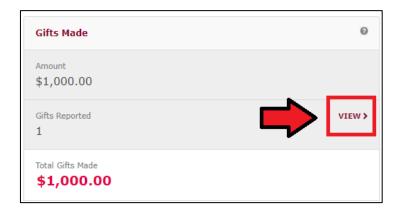


- 8. If you did not make any gifts to other participants in the election, go to step 10. Otherwise, please continue to step 9.
- 9. The Return Summary section includes a summary of all the gifts you made to participants in the election.

The Amount and Gifts Reported fields will display the total amount and number of any gifts that you have already reported in EDS using the instructions in section 6.



You can review gifts already reported in EDS by clicking the View button.



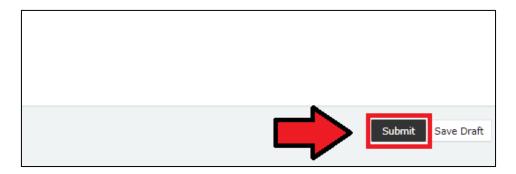
The Total Gifts Made field should reflect the total amount of gifts you made to participants in the election.

10. A draft copy of the election summary return can be saved at any time by choose **Save Draft**.

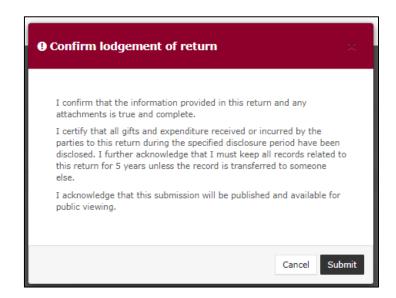


Your draft returns are accessible by choosing **Drafts** from the sidebar.

11. Select **Submit** to lodge the return.



12. Choose **Submit** again to confirm the information contained in the return is correct.



13. Your return will appear in your Periodic Returns page, as well as on the public Reports page.

9.2 Submitting an election summary return as a registered third party

To lodge your election summary return, please use the following instructions.

1. From the My Submissions page of the EDS, choose **Lodge Return**.

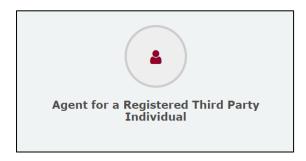


2. On the Type of Obligation page, select **Local Government**.



3. If you are lodging as a or on behalf of a registered third party individual, select **Agent for a Registered Third Party Individual**.

If you are lodging on behalf of an **organisation**, select **Agent for a Registered Third Party Organisation**.





4. On the Lodge a Return page, select the **Lodge** button in the Individual or Organisation Submitting an election summary return box.



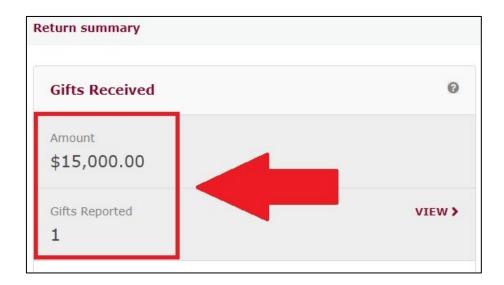
5. In the **Disclosure period dropdown menu**, choose the local government election for which you're filing the summary return. The Return period commences and Return period concludes fields will automatically fill in the appropriate dates.



6. If your third party received no gifts, proceed to step 8. Otherwise continue to step 7.

7. The Return Summary section includes a summary of all the gifts you received for the election that were used to incur political expenditure.

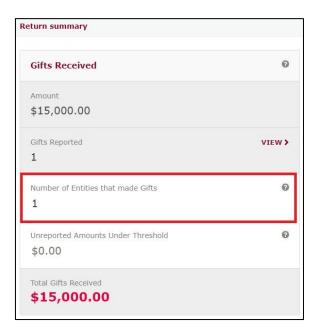
The Amount and Gifts Reported fields will display the total amount and number of any gifts that you have already reported in EDS using the instructions in .



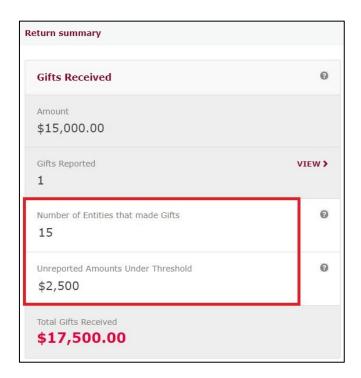
The gifts you have already reported in EDS can be reviewed by selecting the **View** button.



The **Number of Entities that made Gifts** field is prefilled based on any gifts that you have already reported in EDS.



Update this field to reflect the total number of entities that made gifts to your third party during the disclosure period. This includes any entities that made gifts of less than \$500.

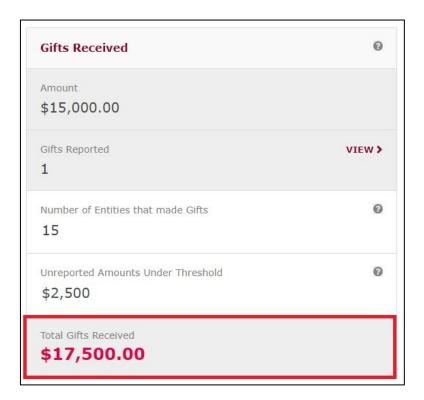


The **Unreported Amounts Under Threshold** field is also editable, and should be updated with the total value of any gifts that you received of less than \$500 that have not already been reported in EDS.

For example: You received a \$15,000 gift from a donor, which you used to incur political expenditure for the election. You have already reported this gift in EDS in a separate return (as in <u>section 8</u>). This gift will appear automatically in the Amount and Gifts Reported fields of your election summary return.

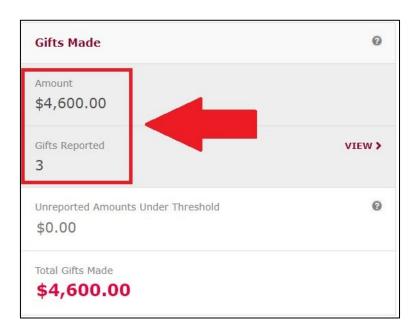
However, you also received several smaller gifts from 14 other donors which totalled \$2,500. In the **Number of Entities that made Gifts** field, you will need to update the number from 1 to 15. In the **Unreported Amounts Under Threshold** field, you will need to update the amount from \$0.00 to \$2,500.00.

The **Total Gifts Received** field should reflect the total amount of gifts you received that were used to incur political expenditure for the election. It is calculated based on the sum of the **Amount** and the **Unreported Amounts Under Threshold**.

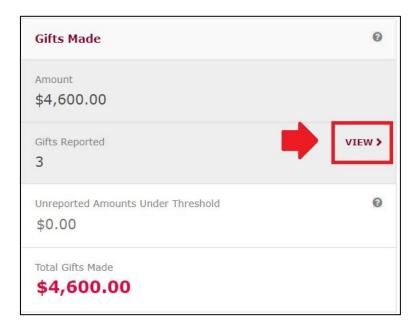


- 8. If you did not make any gifts to other participants in the election, go to step 10. Otherwise, please continue to step 9.
- 9. The Return Summary section also includes a summary of all the gifts you made to participants in the election.

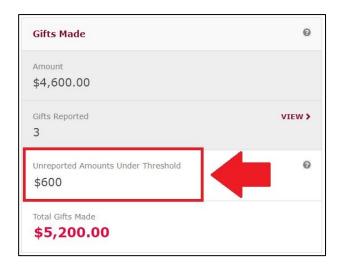
The Amount and Gifts Reported fields will display the total amount and number of any gifts that you have already reported in EDS using the instructions in <u>section 6</u>.



You can review gifts already reported in EDS by clicking the View button.

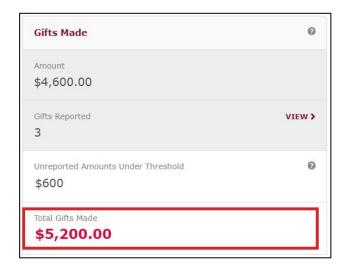


The **Unreported Amounts Under Threshold** field is editable. This field should be updated with the total value of any gifts that you made of less than \$500 that have not already been reported in EDS



For example: the registered third party has lodged returns in EDS for 3 gifts to other election participants totalling \$4,600. They also have made several smaller gifts to election participants which have not been reported in EDS. The **Unreported Amounts Under Threshold** field has been updated from \$0.00 to \$600.

The Total Gifts Made field should reflect the total amount of gifts you made to participants in the election. It is comprised of the Amount field plus the Unreported Amounts Under Threshold field.

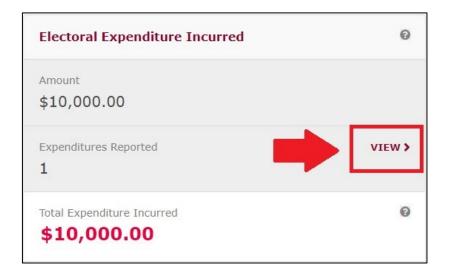


10. The Return Summary section includes a summary of all electoral expenditure that you incurred for the election.

The Amount and Expenditures Reported fields displays the total amount and number of any items of electoral expenditure that you have already reported in EDS using the instructions in <u>section 7</u>.



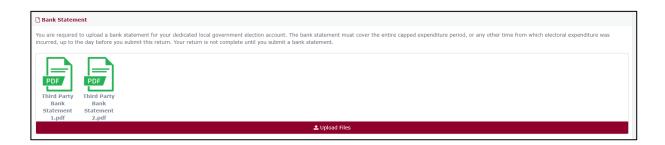
You can review any expenditure that you have already reported in EDS by clicking the **View** button.



The Total Expenditure Incurred field should reflect the total amount of electoral expenditure that your third party incurred for the election.



11. Under the **Bank Statement** section, select **Upload Files** to upload the bank statement for your dedicated campaign bank account. Multiple files can be uploaded by holding down your **Ctrl** button or by selecting **Upload Files** for each file.

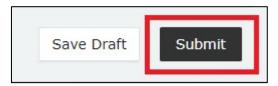


12. A draft copy of the election summary return can be saved at any time by choose **Save Draft**.

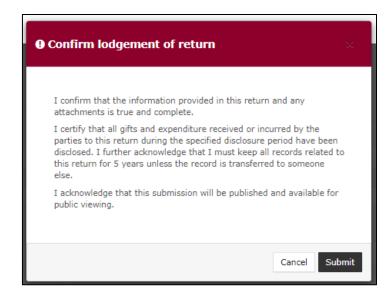


Your draft returns are accessible by choosing **Drafts** from the sidebar.

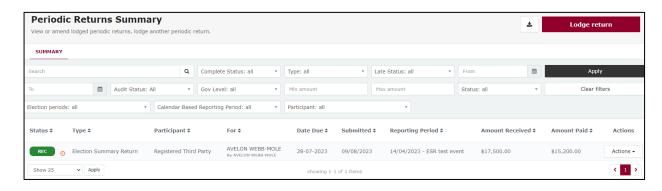
13. Select **Submit** to lodge the return.



14. Choose **Submit** again to confirm the information contained in the return is correct.



15. Your return will appear in your Periodic Returns page, as well as on the public Reports page.



10. Amending a return in EDS

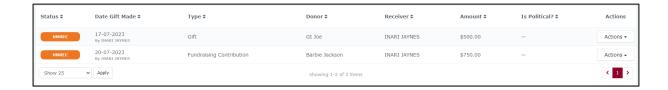
If you have lodged a return in EDS then realised you've made an error or omission, the ECQ can amend the return upon your request.

Existing returns are found under the side menu options:

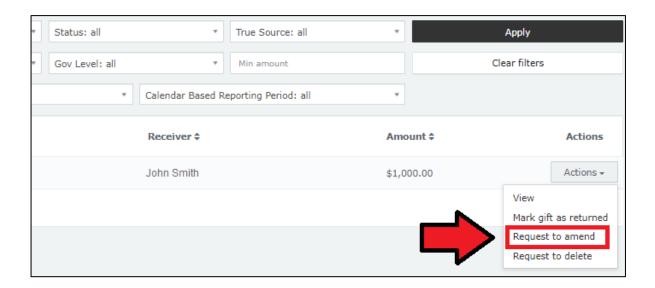
- **My Submissions** displays existing gifts and expenditure.
- Periodic Returns displays existing election summary returns.

To request an amended return in EDS, please use the following instructions.

1. Locate the return that you wish to amend from My Submissions or Periodic Returns of EDS. We will be demonstrating on the \$500 gift from GI Joe.

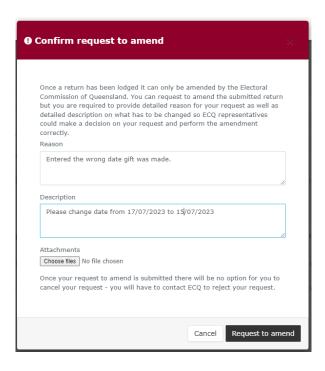


2. In the **Actions** column choose **Request to amend** from the dropdown menu.



- 3. A box titled Confirm request to amend will pop up requesting a **Reason** for amending the return (here we have typed 'Entered the wrong date gift was made') and a **Description** of the change requested (here we have entered 'Please change date from 17/07/2023 to 15/07/2023'.
 - Files can be attached to support your request by selecting Choose
 Files and uploading the files from your computer.

Finally choose the **Request to amend** button to submit the request.



4. Under My Submissions or Periodic Returns Summary page, the return Status will now display as **Pending**, and the return is temporarily removed from the public Gift Map and Reports pages.

Once the amendment has been processed by ECQ, you will receive an email.



11. Mark a gift as returned in EDS

If you lodged a return in EDS for a gift that has since been given back to the donor, you should mark the gift as returned.

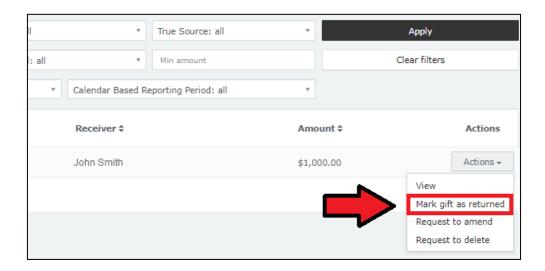
Note: This function can only be used by gift recipients. If a gift you made was returned to you, only the original recipient of the gift can mark it as returned in EDS.

To mark a gift as returned in EDS, please use the following instructions.

- 1. Locate the return for the gift that you wish to mark as returned from the My Submissions page of EDS.
- 2. Find the return you wish to mark as returned (here we will be returning Barbie Jackson's \$750 fundraising contribution).

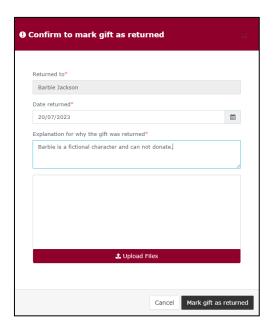


3. Under the **Actions** column select the **Actions** dropdown menu, and then select **Mark gift as returned**.



4. In the Confirm to mark gift as returned window, enter **Date returned** (here we've entered 20/07/2023) and an **Explanation for why the gift was returned** (here it is 'Barbie is a fictional character and cannot donate.') for your returned gift and then select **Mark gift as returned**.

Files to support returned gifts can also be attached by selecting **Upload Files** and uploading from your computer.



5. A returned symbol (\circlearrowleft) will appear next to the gift's listing in the My Submissions page of EDS and on the public Gift Map and Reports pages.

Both you and the donor of the gift (if they are registered in the EDS) will receive an email confirming the gift has been marked as returned.

