

OCPF Filer Organization Application

User Guide



June 2019

Table of Contents

1. Introduction

- 1.1 [Purpose of Filer Organization Application](#)
- 1.2 [Who is Eligible to Use Filer Organization Application](#)
- 1.3 [Who is NOT Eligible to Use Filer Organization Application](#)
- 1.4 [Filer Organization Process Overview](#)

2. Getting Started

- 2.1 [System Requirements](#)
- 2.2 [Navigating the System](#)
- 2.3 [Information You Need to Register](#)

3. OCPF Filer Organization Application – User Login

- 3.1 [Create New Account](#)
- 3.2 [Existing User Login](#)

4. OCPF Filer Organization Application – Data Entry

- 4.1 [Candidate Section \(Candidate Committees only\)](#)
- 4.2 [Office Sought \(Candidate Committees only\)](#)
- 4.3 [Committee Information](#)
- 4.4 [Committee Officers](#)
- 4.5 [Bank Information](#)
- 4.6 [Legal Disclosures](#)
- 4.7 [Review, Certify, and Sign](#)

5. OCPF Filer Organization Application – Electronic Signatures

- 5.1 [How to E-Sign the Statement of Organization](#)

1. Introduction

1.1 Application Purpose

OCPF developed this application to streamline the organization of committees for external users and OCPF staff.

1.2 Who is eligible to organize with OCPF using OCPF Filer Organization Application

1. **Candidates involved in races for the following Massachusetts offices:**

- Statewide offices such as Governor
- Governor's Council
- House
- Senate
- County Sheriff, Commissioner & Treasurer
- Clerk of Courts
- Register of Deeds
- Register of Probate
- District Attorney
- Suffolk County Superior Clerk & Clerk of Supreme Judicial Court
- Mayor
- City Councilor (in cities with a population over 65,000)
- Barnstable Assembly of Delegates

2. **State Political Action Committees (PACs)**

A political action committee, or "PAC", is a political committee that is organized to support or oppose a candidate or a slate of candidates. Therefore, a PAC could be organized to support or oppose a particular candidate. It could also be organized to support or oppose a variety of candidates of a particular party or who support a particular cause. A PAC is separate from a candidate's committee.

3. **Independent Expenditure Political Action Committees (IEPACs)**

An IEPAC is a political action committee that receives contributions to make independent expenditures, and only makes independent expenditures. Unlike other PACs, independent expenditure PACs may receive contributions from individuals without limit, and from corporations and other entities that are otherwise prohibited from contributing to PACs pursuant to [M.G.L. C.55, Section 8](#).

Independent expenditure PACs are subject to all other requirements that apply to other PACs, including recordkeeping and reporting requirements.

4. **State Ballot Question Committees**

A Ballot Question Committee is a person or group of people who raise or spend money to support or oppose a question put to voters at a state election.

- If the question appears on a statewide ballot, the committee must organize with OCPF and file regular Campaign Finance Reports with this office.
- If the question the committee was formed to support or oppose is put to voters in a municipal election, the committee must organize with their local election official: the city or town clerk or election commission.

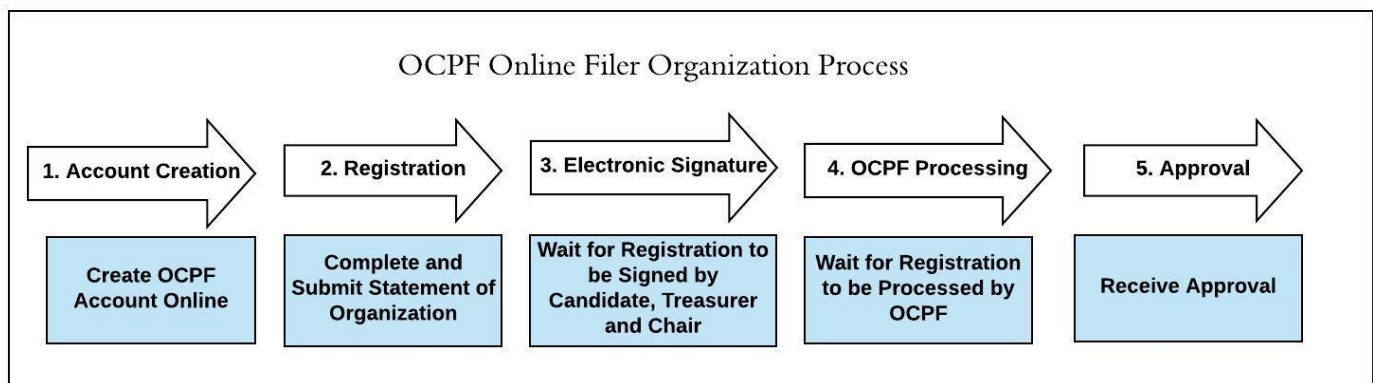
In either case, a ballot question committee is not intended to have an indefinite life; it must dissolve after the resolution of the question at the election.

1.3 Who is NOT eligible to organize with OCPF using this application

At present, the filer types listed below cannot organize with OCPF using OCPF Online Filer Organization system. These types of filers must submit the Statement of Organization Form **in paper** to organize with OCPF. Please see the detailed instructions for each filer type.

Filer Type	How to Organize
Segregated fund accounts	Register and file reports with OCPF. Click here for instructions on how to organize with OCPF.
Independent Spending Reports	Register and file reports with OCPF. Click here for instructions on how to organize with OCPF.
Local Political Party Committees	Register and file reports with OCPF. Click here for instructions on how to organize with OCPF.
Local Political Action Committees	Register and file reports with the local election official. Click here for instructions on how to organize with local official.
Local (Municipal) Ballot Question Committees	
Local offices	

1.4 Organization Application Process Overview



Step 1: Create an OCPF account

Before you can organize a committee, you must register with OCPF using your email address @ <https://ocpfreporter.us/OnlineOrganization/SignUp>. After signing up, you will receive a validation email. This email includes a link back to OCPF's website to complete the registration process.

Step 2: Complete and Submit Your Organization

There between five and seven sections in this application listed below.

Registration Part	To be completed by
Filer Type	All filer committees
Candidate	Candidate committees
Office Sought	Candidate committees
Committee Information	All filer committees
Committee Officers	All filer committees
Bank Information	All filer committees
Legal Disclosures	All filer committees
Review, Certify and Sign	All filer committees

Step 3: Candidate (if applicable), Treasurer and Chairperson e-signs the submission

Once you submit your Statement of Organization, OCPF will send emails to the candidate (candidate committees only), and the named treasurer and chairperson for their electronic signatures to complete the registration process.

Step 4 & 5: OCPF approves the submission and assigns a CPF ID to your committee

Once the Statement of Organization is submitted, it'll be routed to an auditor to be approved. Once approved, a CPF ID number will be issued and the filer's record can be viewed on OCPF's website (<https://www.ocpf.us/Filers/Index>).

The candidate and the committee officers identified in the submission will receive approval notifications via email.

2. Getting Started

2.1 System Requirements

Minimum Requirements:

- The OCPF Filer Organization Application should function on most browsers (e.g. Google Chrome, Microsoft Edge, Mozilla Firefox, Apple Safari, etc.).
- Internet Explorer may not work properly. We recommend upgrading to a different browser such as Chrome, Edge, Firefox, or Safari.

Printing:

- Pop-up windows should be enabled in the browser setting in order to print the electronic OCPF Statement of Organization form.

Email Notifications

OCPF will send the following notifications via email through the online organization process. To ensure notifications emails are not directed to a Spam or Junk mail folder, please add ocpf@cpf.state.ma.us to your email account's safe senders email list.

- An email with a link to validate the sign-up email account
- An email confirmation after the online Statement of Organization is submitted
- Email notifications sent to Candidate, Treasurer and Chair for their electronic signatures to complete the Statement of Organization
- Email notifications sent to Candidate and Treasurer once the Statement of Organization is approved by OCPF

2.2 Navigating the application

The users should start at the *Getting Started* page in OCPF's homepage (<https://www.ocpf.us/>) to access this application.

The screenshot shows the OCPF homepage with a navigation bar at the top. The main heading is 'Massachusetts Office of Campaign and Political Finance'. Below this, there are links for 'Report Log', 'Browse registered filers & reports', 'Search Campaign Finance Data', and 'Contribution Limits Chart'. The 'Getting Started' section is highlighted, and a red box contains the instruction: 'Select the filer type, and follow the instructions to organize with OCPF'. Below this, there are four steps: Step 1: Click here to organize your committee with OCPF. Step 2: Set up your Bank Account. Step 3: Complete Online Treasurer Training. Step 4: Start using OCPF Reporter to prepare and file your campaign finance reports. The right sidebar contains sections for 'E-Filing / Reporter Sign-In', 'Events', 'Upcoming Seminars', and 'Upcoming Filing Deadlines'.

After logging into the system, UI tools such as the navigation bar, progress bar and other features make it easy to navigate through the online organization system:

Features	Details
Progress bar	Displayed at the top of the screen above each section in the Statement of Organization form, this bar shows which part you are on and how you have progressed through the online organization system.
Step icon	Displayed as part of the progress bar, the color of the icon shows the status of each section: <ul style="list-style-type: none"> gray: Section is yet to be completed blue: Section is active green: Section is complete red: Missing information in this section
Navigation bar	Buttons listed on the top right of each section: <ul style="list-style-type: none"> Save: Save the data you have entered Start over: Start a new registration Home: Go to the home page to manage your registrations Logout: Exit the application
Previous button	Click the “Previous” button to return to the previous section of the Statement of Organization form. Please use the “Previous” button instead of your browser’s back arrow.
Next button	Click the “Next” button to: <ul style="list-style-type: none"> Continue to the next section of the Statement of Organization form Each time you click the Next button, your data is saved

2.3 Information You Need to Register

New filers need several key pieces of information to complete the online organization process. The checklist below outlines the information needed to complete the organization process.

Filer Type	Information you need to register
Candidate	<ul style="list-style-type: none"> ✓ The office's name and district ✓ The chair and treasurer's full names, mailing addresses, email addresses and phone numbers ✓ The committee's full mailing address ✓ The candidate's full name, residential address, email address and phone number ✓ The name of the bank that will hold your committee's funds
State Political Action Committees (PACs)	<ul style="list-style-type: none"> ✓ The full name of the political committee ✓ The statement of purpose of the political committee ✓ The chair and treasurer's full names, mailing addresses, email addresses and phone numbers ✓ The committee's full mailing address ✓ The name of the bank that will hold your committee's funds
Independent Expenditure Political Action Committees (IEPACs)	<ul style="list-style-type: none"> ✓ The full name of the political committee ✓ The statement of purpose of the political committee ✓ The chair and treasurer's full name, mailing address, email address and phone numbers ✓ The committee's full mailing address The name of the bank that will hold your committee's funds
State Ballot Question Committee	<ul style="list-style-type: none"> ✓ The full name of the committee ✓ The statement of purpose of the political committee ✓ Topic of the ballot question and question number if known ✓ The chair and treasurer's full names, mailing addresses, email addresses and phone numbers ✓ The committee's full mailing address The name of the bank that will hold your committee's funds

3. OCPF Filer Organization Application – User Login

3.1 Create A New Account

To begin the process, register with OCPF at <https://www.ocpfreporter.us/OnlineOrganization/SignUp>).

[Create New Account](#)
[Log in](#)

You are organizing a committee with OCPF. Are you:

☐ **The Candidate**
 A candidate is an individual seeking a position in elected office

☒ **The Treasurer**
 A treasurer is responsible for managing the finances for a political committee

☐ **An Agent**
 An agent is someone who has a role in the committee other than candidate or treasurer

Your First Name:

Your Last Name:

Your Email Address:

Your Phone Number:

Password:

Confirm Password:

[Register](#)

- a. Select your role in the committee: candidate, treasurer, or agent.
 - i. Candidate: The individual seeking the elected office.
 - ii. Treasurer: The individual responsible for managing the finances of a political committee.
 - iii. Agent: An agent is someone who has a role in the organization other than the candidate, treasurer, and chair, for example, the secretary, the data entry clerk.
- b. Provide the following information: First Name, Last Name, Email address, Phone Number, and Password.
 - i. Password rule: at least 13 characters.
- c. Click the *Register* button.
- d. A verification email will be sent to your email account; Click the embedded link to verify your email address.

Welcome to OCPF's Filer Organization System!

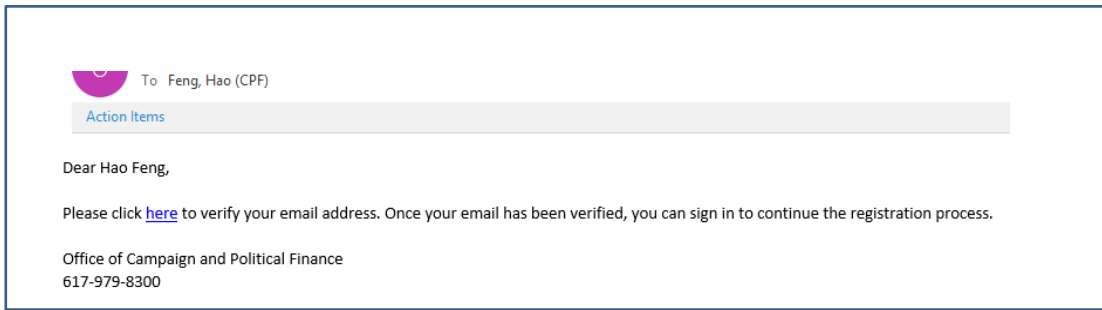
You can use this system to organize the following committees with OCPF:

Statewide, County, and District Office	House and Senate
Mayor	City Councilor (population over 65000)
State Political Action Committees (PACs)	State Ballot Question Committee
Independent Expenditure Political Action Committees (IEPACs)	

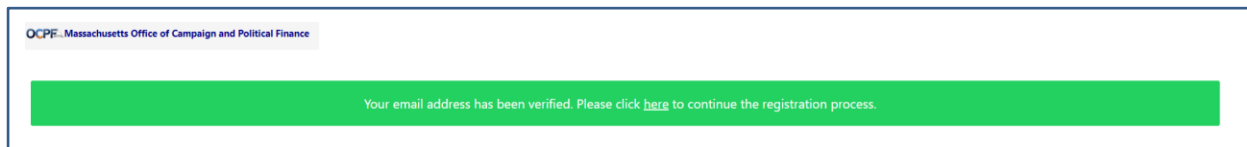
[Create New Account](#)
[Log in](#)

We have sent an email to the registered email account. Please follow the instructions in that email to activate your account.
 If you do not receive this email within a few minutes, please check your Spam / Junk folder.

- e. The email will be similar to the picture below:



- f. Once you click on the link embedded in the email, it will take you to a web page with the following message.



- g. Click the “click here” link to begin the online organization process.

3.2 Existing User Login

1. After you register with OCPF, you can return to complete the process at any time or check the status of the organization by logging in again.

OCPF, Massachusetts Office of Campaign and Political Finance

Welcome to OCPF Online Registration System!

You can use this system to register with OCPF for the following committees:

Statewide, County, and District Office	?	House and Senate	?
Mayor or City Councilor (population over 65000)	?	Mayor (population up to 65000)	?
State Political Action Committees(PACs)	?	State Ballot Question Committee	?
Independent Expenditure Political Action Committees (IEPACs)	?	Segregated fund accounts	?

Create New Account [Log in](#)

Please log in to finish the Statement of Organization

[Login](#) [Forgot Password?](#)

2. To log-in, click on the “Log in” tab, provide your email address and password and click the *Log-in* button.
3. A list of active organizations will be presented to you.
 - i. If the organization is in progress, click on the *Continue* button to continue where you left off.
 - ii. If your organization has been submitted to OCPF but not signed, click on “View & Sign”, you can view the submitted registration. If you’re the treasurer, candidate or chair, you’ll have to electronically sign it.
 - iii. The status column will indicate what steps remain to be completed before OCPF can approve your statement of organization.

OCPF, Massachusetts Office of Campaign and Political Finance

Welcome: Anya Chen [Log Out](#)

[Registrations](#) [User Information](#)

Registrations Submitted

Submission Date	Filer Type	Filer Name	Office Sought	Treasurer Name	Submitted By	Your Role	Status	CPF ID	
6/7/2019	Candidate	An Committee	City Councilor, Lynn	Anya Chen	Xiaoyi An	Treasurer	<input checked="" type="checkbox"/> Submitted <input checked="" type="checkbox"/> Treasurer Signed <input checked="" type="checkbox"/> Candidate Signed <input checked="" type="checkbox"/> Chair Signed <input type="checkbox"/> Pending OCPF approval	To be assigned by OCPF	View & Sign

4. OCPF Filer Organization Application – Data Entry

OCPF's Organization Application contains between five and seven sections depending on the type of committee.

After your registration is complete, you must select the type of committee you wish to organize.

The screenshot shows the 'Statement of Organization' form for the OCPF (Massachusetts Office of Campaign and Political Finance). The user is logged in as 'Hao Feng'. The form asks 'What kind of committee are you organizing?' and provides four radio button options:

- ☐ **A Candidate**
This committee is organized on behalf of an individual candidate who is seeking a position in statewide, county, house, senate, or mayoral office, or city council seats in cities with populations of 65,000 or more. [more info](#)
- ☐ **State Political Action Committees (PACs)**
Committees that raise and spend money to support or oppose one or more statewide, legislative, district & county, mayoral or some city council candidates, based upon stated principles or interests. [more info](#)
- ☐ **State Ballot Question Committees**
For questions appearing on a statewide election ballot. [more info](#)
- ☐ **Independent Expenditure Political Action Committees (IEPACs)**
A political action committee that only receives contributions to make independent expenditures, and which only makes independent expenditures. [more info](#)

At the bottom right of the form is a 'Next' button.

4.1 Candidate Section (Candidate committees only)

In this section, you'll need to provide the following candidate information: candidate name, party affiliation, residential address, and candidate email address and phone number.

The screenshot shows the 'Statement of Organization' form for a 'Candidate Committee'. The form is divided into sections by a progress bar at the top: Candidate, Office Sought, Committee, Officers, Bank, Legal Disclosures, and Sign & Submit. The 'Candidate' section is currently active and contains the following fields:

Candidate Information

- Salutation: Please select (dropdown)
- First Name: Hao
- Middle Name / Middle Initial: Middle Name / Middle Initial
- Last Name: Feng
- Party Affiliation: Unenrolled / Independent / Unspecified (dropdown)

Candidate Residential Address

- Street Address: Street Address
- City: City
- State: Massachusetts (dropdown)
- Zip: (dropdown)

Candidate Contact Information

- Candidate Email Address: hao.feng@cpf.state.ma.us
- Candidate Phone Number: (123)-123-1234

At the bottom of the form are 'Previous' and 'Next' buttons.

4.2 Office Sought (Candidate Committees Only)

Office Sought: Please provide the office the candidate is seeking. OCPF has two reporting systems, the depository and non-depository disclosure systems. Depending on the office selected, you will file reports via the appropriate system.

The screenshot shows the 'Office Sought' step in a multi-step process. At the top, a progress bar includes steps: Candidate, Office Sought (current), Committee, Officers, Bank, Legal Disclosures, and Sign & Submit. The main heading is 'Office Sought' with the instruction 'Please select the office type'. Below this is a light blue box containing eight radio button options: Statewide, Governor's Council, Senate, House, County, Mayor, City Council, and Assembly of Delegates. Underneath the box is a 'District Sought' section with a dropdown menu labeled 'Select an office/district:'. At the bottom are 'Previous' and 'Next' buttons. The top navigation bar includes a welcome message 'Welcome: Xiaoyi An', the title 'Statement of Organization Candidate Committee', and links for Save, Start Over, Home, and Logout.

4.3 Committee Information

Please provide the physical mailing address of the committee.

The screenshot shows the 'Basic Committee Information' step in the same multi-step process. The progress bar now highlights the 'Committee' step. The main heading is 'Basic Committee Information' with the sub-heading 'Committee Mailing Address'. The form contains four input fields: 'Street Address', 'City', 'State' (a dropdown menu currently showing 'Massachusetts'), and 'Zip' (a dropdown menu). 'Previous' and 'Next' buttons are at the bottom. The top navigation bar is identical to the previous screenshot.

4.4 Committee Officers

In this section, you'll provide information about the committee treasurer and chairperson. You also add one or more agents. See below for more information about agents.

Candidate

Office Sought

Committee

Officers

Bank

Legal Disclosures

Sign & Submit

Officers

Treasurer Information

Salutation: Please select
First Name: Xiaoyi
Middle Name / Middle Initial: Middle Name / Middle Initial
Last Name: An
Street Address: Street Address
City: City
State: Massachusetts
Zip:
Email Address: xan@cpf.state.ma.us
Phone Number: (617)-617-617

A public employee may not serve as treasurer of any political committee. Please call OCPF (617-979-8300) if you don't know if you are a public employee.

Chair Information

Salutation: Please select
First Name: First Name
Middle Name / Middle Initial: Middle Name / Middle Initial
Last Name: Last Name
Street Address: Street Address
City: City
State: Massachusetts
Zip:
Email Address: Email Address
Phone Number: Phone Number

A committee must select a Chairperson. The treasurer or candidate may serve as Chairperson of a committee, although a public employee should not be selected as a Chairperson.

Designated Agents

Agent is someone who has a role in the organization other than the Candidate, Treasurer, and Chair. An agent may receive email notifications from OCPF to ensure your Campaign Finance Reports are completed correctly and in a timely manner.

The treasurer of the committee is responsible for the timely filing of accurate campaign finance reports.

Click here to add an agent

Designated Agents

Agent is someone who has a role in the organization other than the Candidate, Treasurer, and Chair. An agent may receive email notifications from our office to ensure your Campaign Finance Reports are completed correctly and in a timely manner.

The treasurer of the committee is responsible for the timely filing of accurate campaign finance reports.

Click here to add an agent

Agent Information

First Name: First Name
Last Name: Last Name
Email Address: Email Address
Phone Number: Phone Number

Allow access to prepare reports?
☐ Yes
☒ No

Save

An agent is an individual who has a role in the organization other than the Candidate, Treasurer, and Chair, for example, the secretary or a data entry clerk. An agent may receive email notifications from OCPF to ensure your Campaign Finance Reports are completed correctly and in a timely manner.

Allow access to prepare, file, and edit reports?: checking "Yes" will give the agent the access to OCPF E-Filing System, a software used by OCPF registered filers to file Campaign Finance Reports.

4.5 Bank Information

This section will appear differently depending on whether your committee is a depository filer or a non-depository filer.

Who files in the Depository Reporting System?

Office in Depository Reporting System	Office in Non-Depository Reporting System
Statewide Office	House
Governor's Council	Senate
County and District Offices	Mayors in cities with populations up to 65,000
Mayors & City Councilors in cities with 65,000+ populations	State Ballot Question Committee
State Party Committees	Independent Expenditure Political Action Committees
State Political Action Committees (PACs)	Local Political Party Committees

Depository Committees

If your committee is required to file reports using the depository system, indicate whether the committee intends to accept contributions or not. An additional form will be emailed to you if you intend to raise funds. This form, the D103, is to appoint a bank for committee funds, this bank must participate in OCPF's depository system. See <https://www.ocpf.us/Filers/GettingStartedDepository> for a list of participating banks. This form must be signed by a representative of the depository bank.

Welcome: Hao Feng

Statement Of Organization Candidate Committee

Save

Start Over

Home

Logout

Candidate

Office Sought

Committee

Officers

Bank

Legal Disclosures

Sign & Submit

Bank Information

Please select one:

☒ I intend to accept contributions, make expenditures, including expenditures of my own funds, or incur liabilities for any campaign-related purpose.

☐ I do not intend to accept contributions, make expenditures, including expenditures of my own funds, or incur liabilities for any campaign-related purpose.

Committees in OCPF's Depository System are required to complete [Form CPF D103, Appointment of Depository Bank](#). This form is need to designate an authorized financial institution as a depository for the committee's campaign funds, and it should be completed on the day the committee is organized, or shortly afterward.

OCPF will send you Form D103 via Email once you complete the Statement of Organization.

Please click "Next" to go to the next section.

Previous

Next

Please select one:

- ☐ I intend to accept contributions, make expenditures, including expenditures of my own funds, or incur liabilities for any campaign-related purpose.
- ☒ I do not intend to accept contributions, make expenditures, including expenditures of my own funds, or incur liabilities for any campaign-related purpose.

If you don't intend to accept contributions, make expenditures, or incur liabilities for your campaign, please read the following and electronically sign below.

Please Sign Below.

I hereby certify that I have not opened a campaign bank account for campaign funds because I do not intend to accept contributions, make expenditures, including expenditures of my own funds, or incur liabilities for any campaign-related purpose. I submit the following as my campaign report for all bank reporting periods in this election cycle as provided for in Chapter 55 of the Massachusetts General Laws:

1. Ending Balance from previous report	ZERO
2. Total receipts for reporting period	ZERO
3. Subtotal	ZERO
4. Total Expenditures for reporting period	ZERO
5. Ending balance	ZERO

If, after filing this statement, I decide to raise or expend funds for a campaign-related purpose, I will immediately contact OCPF for information on how to designate a depository bank, open an account at the designated bank, and complete and file an Appointment of Depository Bank (D103) Form.

Until such notice is on file with the Director, I certify that the above report, reflecting "zero" campaign finance activity, will be in effect for each reporting period required by Chapter 55 of the Massachusetts General Laws.

Signed under pains and penalties of perjury:

Electronic Signature: (type your name)

Non-Depository Committees

If your committee is not in the depository system (see chart above), you must simply provide the name(s) of each bank where you intend to keep committee funds.

Welcome: Xiaoyi An
Statement of Organization Candidate Committee

Save Start Over Home Logout

Candidate Office Sought Committee Officers Bank Legal Disclosures Sign & Submit

Bank Information

What Bank are you going to use to manage the committee's campaign funds?

Bank / Financial Institution Name: (Leave it blank if you don't have one yet)

Previous Next

4.6 Legal Disclosures

In the *Legal Disclosures* section, please review the legal terms of your submission, check the box and electronically sign at the bottom by typing your name.

Welcome: Xiaoyi An

Statement of Organization *Candidate Committee*

[Save](#) [Start Over](#) [Home](#) [Log Out](#)

[Candidate](#) [Office Sought](#) [Committee](#) [Officers](#) [Bank](#) [Legal Disclosures](#) [Sign & Submit](#)

Legal Disclosures

Are you a public employee? [?](#)

☐ Yes ☒ No

I hereby accept the office of Treasurer.

I affirm that I am not a public employee as defined by M.G.L.C.55, Section 13. I understand that:

1) I am subject to certain duties and liabilities under M.G.L.C.55, including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; 2) if after my acceptance of this office I become an appointed public employee, I must resign this position and notify OCPF of my resignation; and 3) a candidate may not serve as treasurer of the political committee organized on his/her behalf.

☒ I hereby accept the office of **Treasurer** and understand the legal disclosures.

Signed under pains and penalties of perjury:

Electronic Signature: (type your name)

[Previous](#) [Next](#)

4.7 Review, Certify, and Sign

Click the checkbox and click the “Submit” button to certify the submission.

Preview, Certify, and Submit

Please review the information below, and click "Certify" and "Submit" button to submit your Statement of Organization.

Candidate

 Edit

Name: Eric Fesh
Address: 110 School Street Waltham MA 02451
Email: anxiaoyi.ny@gmail.com
Phone: (212)-222-2222
Party Affiliation: Democratic

Committee

 Edit

Address: 100 Gilbert Rd Belmont MA 02478

Purpose

 Edit

Office/District Sought: Treasurer, Dukes County

Treasurer

 Edit

Name: Xiaoyi An
Address: 100 Gilbert Rd Belmont MA 02478
Email: xan@cpf.state.ma.us
Phone: (646)-637-3574

Chair

 Edit

Name: Xiaoyi An
Address: 100 Gilbert Rd Belmont MA 02478
Email: xan@cpf.state.ma.us
Phone: (646)-637-3574

Bank

 Edit

Intend to accept contributions and make expenditures:
Appointment of Depository Bank is required

Agents

 Edit

Contacts:

☐ I certify that I have examined this statement and to the best of my knowledge and belief it is true, correct, and complete.

[Previous](#)[Submit](#)

Below is an example of missing information in the Committee section.

Indicate Office Sought **Committee** Officers Bank Legal Disclosures Sign & Submit

Preview, Certify, and Submit

City is missing in Committee section,
Zip is missing in Committee section.

Candidate [Edit](#)

Name: John Smith
Address: 110 Watertown Street Belmont MA 02478
Email: anxiaoyi.ny@gmail.com
Phone: (123) 456-7899
Party Affiliation: Republican

Committee [Edit](#)

Address: 28 Common Street MA

Purpose [Edit](#)

Office/District Sought: Senate, 1st Middlesex

Treasurer [Edit](#)

Name: Xiaoyi An

- If there is missing information, you can click the “Edit” button to make changes to the corresponding section.
- After clicking the *Submit* button, you will be presented with the message below.

Thank you for submitting your Statement of Organization.

OCPF will email the candidate and committee chairperson for their electronic signatures to complete this process.

This committee is not legally set up until we have signatures from all of the officers listed in the submitted Statement of Organization.

Therefore, this committee may not raise or spend money until all signatures have been submitted and this Statement of Organization has been received, reviewed, and processed by OCPF.

We will notify you as soon as possible once the Statement of Organization is completed with all the signatures.
Please call 617-979-8300 if you have any questions.

[Print Statement of Organization](#) [Email a Copy](#)

- You will receive an email confirmation with the Statement of Organization form attached. See the sample email below.

Thank you for submitting the Statement of Organization

 xan=cpf.state.ma.us@ocpf.us on behalf of OCPF <xan@cpf.state.ma.us>
To: An, Xiaoyi (CPF)

 cpf101-6-14-2019-37-319.pdf
1012 KB

Action Items

Dear Xiaoyi An,

We have received your Statement of Organization for the John Smith Committee. Please see the attached copy of the CPF 101 Statement of Organization form.

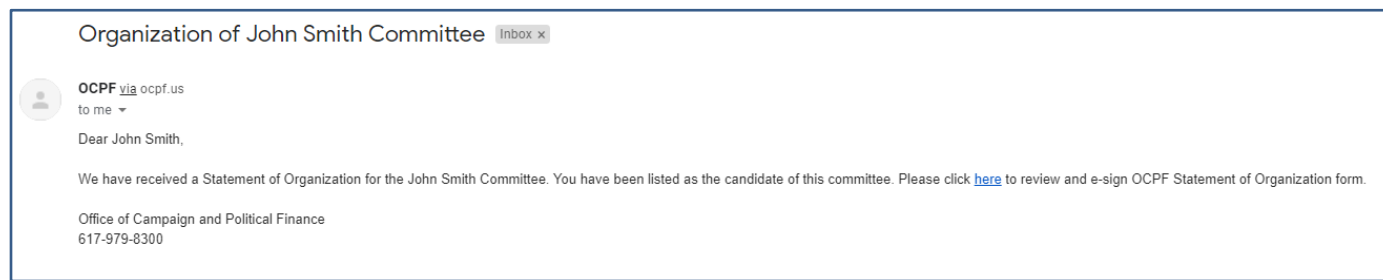
We will notify you once the Statement of Organization is processed by OCPF.

Office of Campaign and Political Finance
617-979-8300

5. OCPF Filer Organization Application – Electronic Signatures

The statement of organization must be electronically signed by each of the officers named in the submission. Once you complete the organization, the candidate (if applicable), treasurer and chairperson will receive an email containing a link to review and electronically sign the submitted Statement of Organization.

The email will appear as followed:



Clicking the embedded link will bring each recipient to a web page (see below) where they can review the organization submission and provide their electronic signature. If the candidate or treasurer wishes to access the filing software, they should provide a password as well.

Review, Sign, and Submit

Candidate

Name: Xiaoyi S. An
Address: 110 Gilbert Rd Belmont MA 02478
Email: xan@cpf.state.ma.us
Phone: (617)-617-617
Party Affiliation: Libertarian

Committee

Address: 108 Gilbert Rd Belmont MA 02478

Purpose

Office/District Sought: Register of Deeds, Dukes County

Treasurer

Name: Anya Chen
Address: 110 Gilbert Rd Belmont MA 02478
Email: xa2102@columbia.edu
Phone: (222)-222-2222

I hereby accept the office of Treasurer.

I affirm that I am not a public employee as defined by [M.G.L.C.55](#), Section 13. I understand that:

1) I am subject to certain duties and liabilities under [M.G.L.C.55](#), including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; 2) if after my acceptance of this office I become an appointed public employee, I must resign this position and notify OCPF of my resignation; and 3) a candidate may not serve as treasurer of the political committee organized on his/her behalf.

☐ I hereby accept the office of **Treasurer** and understand the legal disclosures.

Signed under pains and penalties of perjury:

Electronic Signature: (type your name)

Please provide a password to access OCPF E-filing System to file Campaign Finance Reports.

Password: 

Confirm Password: