

Comparison of ATX Form Data Fields: Current and Proposed

Form	Current Data Fields	Proposed Data Fields
ATX.1: Independent Expenditures Not by a Candidate	Name of candidate or ballot measure Name of the person or political committee making expenditures Address of the person or political committee making expenditures For each expenditure the following information is provided for each payee: • Name • Street Address • Amount • Purpose • Date • Candidate/Ballot Measure Date filed and signature of filer Notary seal	No data fields will be removed. Fields for the name and address were broken out into individual fields such as first name, last name, address, city, etc. Added fields include: • Report type (January 15, July 15, etc.) • Reporting Period The other change is that, for each expenditure made, the report will include a separate sheet for each payee which includes: • Payee name and address • Expenditure details including category of expenditure (advertising expense, consulting, etc.), expenditure amount, and date • Identifies the candidate or ballot measure that each itemized expenditure was used to support or oppose Date filed and signature of filer Notary seal

Form	Current Data Fields	Proposed Data Fields
ATX.2: Loans and Expenditures From Personal Funds	Name of candidate/officeholder Reporting Period Amount of loan Date of loan Information relating to the person to whom expenditures were made: • Name • Street address • Amount • Purpose • Date Signature of candidate/officeholder	No data fields will be removed. Recommendation is to eliminate this as a separate form and incorporate the information into the State Forms and the City Pre-Election Report. Pre-Election Report contains the following data relating to loans and expenditures from personal funds. On the proposed cover sheet: • Total Pages filed • Filer Name • Filer Address and Phone • Campaign Treasurer Name, Address and Phone • Reporting Period and Office Information • Check box for Reports Attached An itemized list of each loan from personal funds that includes (ATX.7E): • Loan Date and Loan Amount An itemized list of each expenditure made from personal funds that includes(ATX.7G): • Payee name and Payee address • Expenditure details (includes expenditure category, amount, date) • Candidate or ballot measure supported

Form	Current Data Fields	Proposed Data Fields
ATX.3: Campaign Debt Reconciliation	Name of officeholder Campaign debt existing as of the first day of the calendar year Campaign debt existing as of the last day of the calendar year For loans and other debt evidenced by a note: • Creditor • Principal Amount owed • Interest rate • Date of maturity For all other campaign debts • Creditor/vendor • Principal amount owed Total Campaign debts under \$50 if not included as part of the previous itemized lists.	Eliminate the ATX.3. Loan activities are reported on TEC Schedules E and F1, and Form C/OH. The ATX3 form includes a list of outstanding principal amount of each individual loan. The Texas Ethics Commission Schedule E asks for the total outstanding balance of all loans. Payments on loans are reported using Schedule F1. The outstanding principal amount of each loan can be ascertained from the data on the Schedules E and F1 but it is not listed as an individually reported amount.

Form	Current Data Fields	Proposed Data Fields
ATX.4: Bank Reconciliation	Name of candidate, officeholder or campaign committee For each checking, savings or other financial institution account: - Type of account; Beginning balance and Ending balance For checks that have not cleared by December 31 - Date; Payee; and Amount For dishonored checks - Date of receipt; Contributor; and Amount Amount of Interest or dividends earned For all deposits and withdrawals not disclosed on a filed contribution and expenditure report - Date of deposit or withdrawal; Amount of deposit; and Amount of withdrawal A list of checks received by December 31 but not deposited - Date of receipt; contributor and amount	Eliminate the ATX.4. Account activities are reported on TEC Schedules F1, F2, and K and Form C/OH.

Form	Current Data Fields	Proposed Data Fields
ATX.5: Bundling Report	Name of candidate/officeholder For each person or bundler who solicited and obtained contributions: • Name of individual/bundler • Address • Occupation • Employer • Total Amount Bundled For each individual contributor • Name of contributor • Address • Occupation • Employer • Contribution amount • Bundler A list of each person registered or required to be registered under City Code, Chapter 4-8 employed by, or compensated to lobby by: (1) any bundler identified in section 1 above, (2) a business association through which the bundler does business, or (3) the bundler's employer. Signature of candidate/officeholder	No changes proposed to the data collected. The form is redesigned and specific data such as address are broken out into individual data fields.

Form	Current Data Fields	Proposed Data Fields
ATX.6: Exemption Statement	Name of candidate or committee (Last, First, Middle) Address Date of filing Statement: includes blanks for name and campaign period Signature of candidate/campaign committee Date	Since this form is filed and attached to the C/OH Report we eliminated the following: Address (would be included on the C/OH cover sheet) Date of Filing (would be date stamped by the Clerk's Office) The blank for name in the statement and we propose to fill in the campaign period for the filer. The Clerk's Office would update this form with the new campaign periods as necessary. Date Signature of candidate/officeholder

Form	Current Data Fields	Proposed Data Fields
ATX.7: Special Pre-Election Report	Name of political committee or name of candidate/officeholder For each person making a contribution totaling more than \$200 during the period beginning the 9th day and the day before the election: • Name • Address • Amount of contribution • Date accepted • Description of any in-kind contribution For political committees For each expenditures over \$1000 • Name of person to whom expenditure was made • Address • Purpose of expenditure Signature of filer.	No data fields will be removed. Change name to Pre-Election Report Create two reports: One for candidates/officeholders and one for political committees. Report contains the following data. On the proposed cover sheet: • Total Pages filed • Filer Name (candidate/officeholder or political committee) • Filer or committee Address and Phone • Campaign Treasurer Name, Address and Phone • Reporting Period and Office Information • Check box for Reports Attached For contributions received (ATX.7A): • Contributor name; address and employer; contribution details (date, amount and in-kind description) For expenditures made (ATX.7F): • Payee name; address; and Expenditure details (expenditure category, amount, description and date); candidate or ballot measure supported/opposed.

