



Form Instructions

Pre-Election Report - Candidates and Officeholders

Form ATX.7COH

The Pre-Election Report by Candidates and Officeholders must be completed by any candidate who accepts contributions that total more than \$10,000; makes loans from personal funds to the candidate's campaign totaling more than \$10,000; or makes expenditures from personal funds in support of the campaign totaling more than \$10,000 during the period beginning the 9th day before the date of an election and ending at 5 p.m. on the day before the date of an election. The report must be filed with the City Clerk no later than 5 p.m. on the first business day after each date that one or more of the above reporting thresholds are met.

Electronic Filing of ATX.7COH Data

The Pre-Election Report must be filed electronically using the fillable PDF form provided by the City Clerk's Office. The form should be delivered to the City Clerk's Office electronically on a flash drive. Submitting the Pre-Election Report and associated schedules as instructed fulfills the requirement to provide a structured data file. Fillable PDF forms must be received by the City Clerk in the provided format. Printed and scanned, or otherwise modified, copies of the fillable PDFs will render the data unreadable and the City Clerk will be required to reject the submitted data. Email submission of the fillable PDFs is not permitted at this time.

Required fields are highlighted in **red** below. Failure to complete a required field will result in the data file being rejected by the City Clerk.

Per City Code Chapter 2-2-26, the City Clerk will reject data files that do not comply with formatting and data consistency requirements. Acceptance of a paper form does not indicate acceptance of the data file. For each submitted fillable PDF, a validation report will be generated and provided to the filer within one business day, indicating acceptance or rejection of the data file.

The Pre-Election Report by Candidates/Officeholders consists of a coversheet and three schedules:

- Schedule ATX.7E: Loans Made from Personal Funds
- Schedule ATX.7G: Expenditures Made from Personal Funds
- Schedule ATX.7A: Pre-Election Report of Contributions

Page 1: ATX.7COH Coversheet Filer Information

1. Filer Name: The filer's full name.

a. Title: The filer's title, if applicable.

b. First Name: The first name of the filer. *This field is required. A blank value in this field will result in an error that will cause the data file to be **rejected**.*

c. Middle Initial: The filer's middle initial, if applicable.

d. Nickname: The filer's nickname, if applicable.

e. Last Name: The filer's last name. *This field is required. A blank value in this field will result in an error that will cause the data file to be **rejected**.*

f. Suffix: The filer's suffix, if applicable.



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- 2. Filer Address:** The filer's full mailing or street address including city, state, and zip code.
 - 3. Campaign Treasurer Name:** The full name of the filer's campaign treasurer.
 - 4. Campaign Treasurer Address:** The mailing or street address of the filer's campaign treasurer, including city, state, and zip code.
 - 5. Reporting Period:** The date on which the reporting period for this report starts, and the date on which the reporting period for this report ends. Enter all dates in the format *yyyymmdd*. *These fields are required. A blank value in these fields will result in an error that will cause the data file to be **rejected**.*
- Office Information:** The office currently sought and/or the office currently held by the filer, as applicable.

Page 2: ATX.7COH Coversheet Affidavit

- 6. Schedules Attached:** Identifies the schedule type(s) attached to the coversheet. Check all boxes that apply.
- Affidavit:** Signature of filer. Upon receipt of the fillable PDF, the City Clerk will print a paper copy of the form for the filer to sign.

Page 3: Schedule ATX.7A Contribution Information

For each contribution accepted by the filer during the reporting period, the following information must be provided. If the filer has no contributions to report, leave this page blank.

- 1. Contributor Name:** The contributor's full name (for individuals) or the name of the company, political committee, organization, or group (for entities). For individuals, check the box next to "Contributor is an individual". *This field is required. A blank value in this field will result in an error that will cause the data file to be **rejected**.*
- 2. Contributor Address:** The contributor's street or mailing address, including city, state, and zip code. *These fields are required. A blank value in these fields will result in an error that will cause the data file to be **rejected**.*

Contributor Employer and Occupation: If the contributor is an individual, provide the contributor's employer and occupation. *If the contribution amount is \$200 or more, the Contributor Employer and Occupation field is required. A blank value in these fields will result in an error that will cause the data file to be **rejected**.*
- 3. Contribution Details:** For each contribution, the following information must be provided:
 - a. Contribution Date:** The date on which the contribution was accepted. Enter all dates in the format *yyyymmdd*. *This field is required. A blank value in this field will result in an error that will cause the data file to be **rejected**.*
 - b. Contribution Amount:** The amount of the contribution, or the market value of an in-kind contribution. *This field is required. A blank value in this field will result in an error that will cause the data file to be **rejected**.*
 - c. In-Kind contribution Description:** For an in-kind contribution, a description of the contribution.

To add additional contributions, click "Add Another Contribution Page" on the lower left-hand side of the form.



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Page 4: Schedule ATX.7E Loans from Personal Funds

For each loan made from personal funds by the filer to his or her campaign during the reporting period, the following information must be provided. If the filer has no loans to report, leave this page blank.

a. Loan Date: The date on which the loan was made. Enter all dates in the format *yyyymmdd*. *This field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

b. Loan Amount: The principal amount of the loan. *This field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

Page 5: Schedule ATX.7G Expenditures Made from Personal Funds

For each expenditure from personal funds made by the filer during the reporting period, the following information must be provided. If the filer has no expenditures from personal funds to report, leave this page blank.

To report a Direct Campaign Expenditure as defined in City Code 2-2-31, use form ATX.1: Report of Direct Campaign Expenditures

1. Payee Name: The payee's full name (for individuals) or the name of the company, political committee, organization, or group (for entities). For Individuals, check the box next to "Payee is an individual". *The Payee Name field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

2. Payee Address: The payee's street or mailing address, including city, state, and zip code. *These fields are required. A blank value in these fields will result in an error that will cause the data file to be rejected.*

3. Expenditure Details: For each expenditure, the following information must be provided:

a. Category: The category code of goods, services, or other thing of value for which an expenditure is made. *This field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

b. Description: If the category is "Other," a description of the category of goods, services, or other thing of value for which an expenditure is made.

c. Expenditure Amount: The amount of the payment. *This field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

d. Expenditure Date: The date on which the payment was made. Enter all dates in the format *yyyymmdd*. *This field is required. A blank value in this field will result in an error that will cause the data file to be rejected.*

To add additional expenditures, click "Add Another Expenditure Page" on the lower left-hand side of the form.