September 2019

# eReturns

*Individual and Organisation Donor Quick Reference Guide*

AEC
**Australian Electoral Commission**

# Contents

# The basics

## Common icons

| Icon | What it does? |
|------|---------------|
|  | This is the help icon in eReturns. If you click on this icon, further information will be displayed to explain what is on screen. Clicking the icon again, or the close icon in the help text area will close the help text. |
|  | This is the close icon in eReturns. Clicking on this icon will close the help text that it is related to. |
|  | This is the annotation icon in eReturns. Anywhere that this icon appears, you have an opportunity to record further information, be it against an individual transaction, or total. Any information you record in an annotation will be presented on the final return as a footnote.<br><br>Annotations not related to a specific transaction or field are also available within the wizard. This is covered in some detail later on in this guide. |

## Useful information

### Saving

eReturns automatically saves what you are doing while you are working. You do not need to remember to click save while working in eReturns.

# Getting Started

## Logging in to eReturns

### Getting Credentials

eReturns credentials are mailed out to donors in an obligation letter as they are identified from political party and associated entity returns. Your eReturns credentials will look like this in your obligation letter:

**User name:** AdminTestDonor
**Password:** 7a373h3r

eReturns credentials are made up of a user name and one-time password. On the first log-in to eReturns you will be prompted to change the password. There is also an option to change the user name. It is important that eReturns credentials are kept secure and not shared with anyone else.
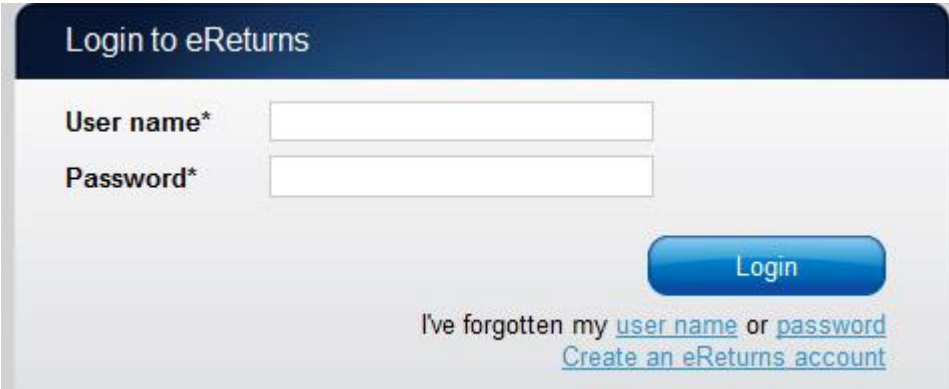
## Getting Started

Once eReturns credentials have been received the eReturns website can be accessed via your web browser.
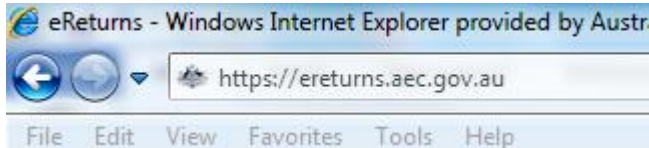




Be careful! – eReturns is a secure website which means you must type 'https://' at the beginning of the URL.

At the eReturns webpage the following login screen will appear.

## Login to eReturns



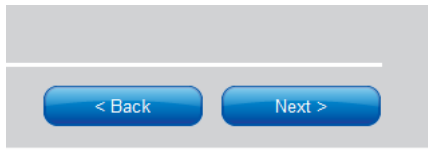Enter your user name and password provided in your obligation letter or the user name and password that you nominated when you created your eReturns account and click 'Login'.

# On first login

To navigate through the eReturns wizard use the 'Back' and 'Next' buttons at the bottom right of the screen.



The first time you log in to eReturns you will be prompted to verify your details.

**Step 1**: Organisation Details

Where the eReturns credentials entered match to an obligation for an organisation donor you can review and update the details of the organisation you are lodging on behalf of on this screen. Individual donors will not see this screen; they will be taken straight to Step 2. Once the details are complete you can confirm by clicking 'Next'.

**Step 2**: Contact details



On this screen you can update your details. These details have been automatically pre-filled from your account.

Please ensure your email address is correct as eReturns uses email for validation and to send you copies of any returns which you lodge.



Once you have updated your details click 'Next' to move to the Account details screen.

**Step 3**: Account Details

On this screen you will be able to change your user name if you wish.

If you have received your eReturns credentials via an obligation letter you will also be required to enter a new password and provide a secret question and answer and a PIN.

This secret information will be used by AEC staff to verify your identity over the phone if you need to contact the Help Desk.

If you created your own eReturns account you are not required to change your user name or password unless you want to.



Once you have completed the Account details screen, click 'Next'.

**Step 4**: Confirmation



eReturns will automatically generate a verification email and send it to your email address. Before your eReturns account can be activated you will be required to verify your email address. This is done by clicking on the link in the email.



Clicking this link verifies that you have access to the email account.

Once you have verified your email address you are able to start using your eReturns account

## Login

Click the 'Back to login' button to return to the eReturns login page.
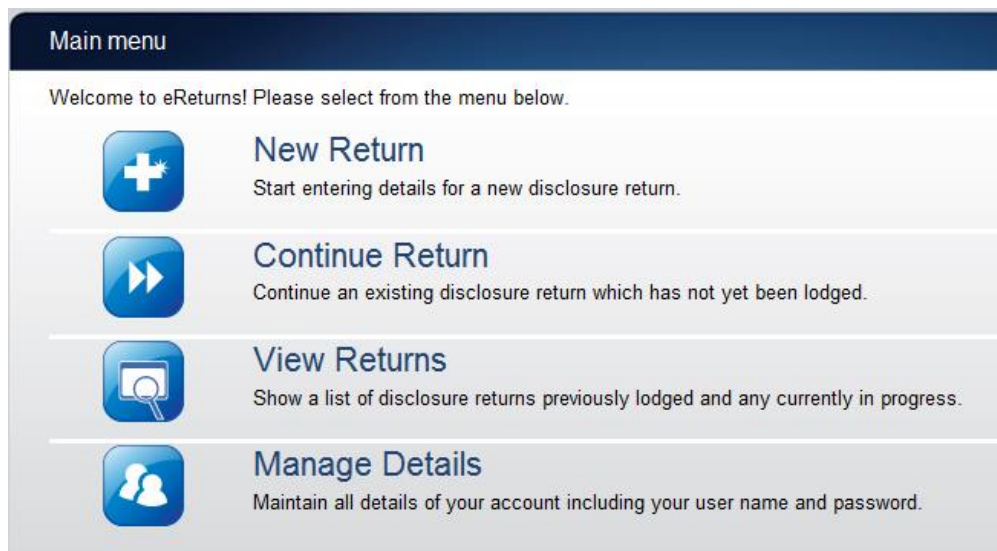


From here, enter your user name and password to login. If you received your eReturns credentials via an obligation letter remember you will have changed your password and may have changed your user name.

# Using eReturns

## Main Menu

Once you have logged in you will see the eReturns main menu.

From the main menu you can start a new return, continue a return which is partially complete, view historical returns and manage your account details.

Your account details are the details which you reviewed and updated when you logged in for the first time.

# Completing a return - Organisations

## New Return

Click the 'New Return' button to start completing a new return.
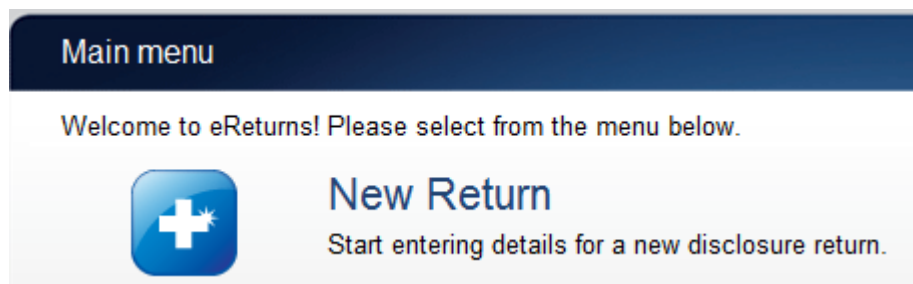


Then choose the return which you would like to complete. The actual list of returns that will appear will be dependent on whether you are an individual or organisation donor and whether you have lodged any returns previously. The example screen below is for an organisation donor.
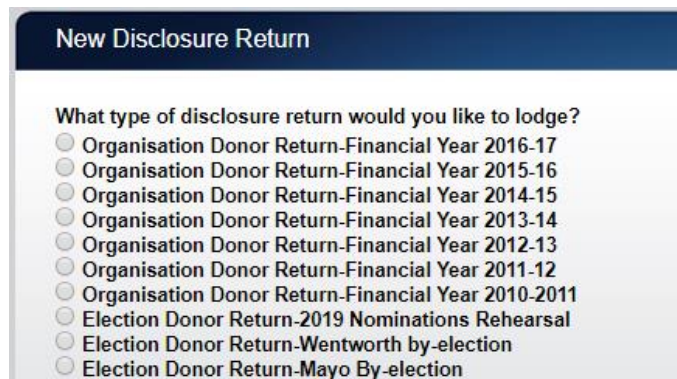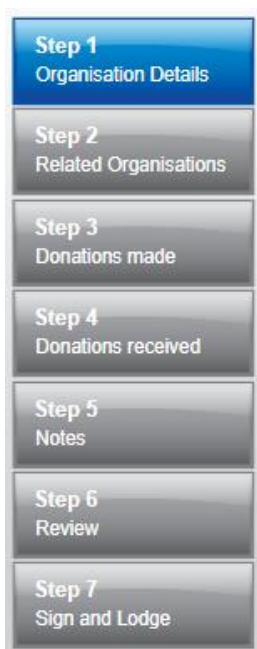


Click 'Continue' to launch the return wizard. Similar to when you review your account details you can use the 'Back' and 'Next' buttons to navigate through the screens.

Instructions on how to complete the wizard will appear at the top of each page
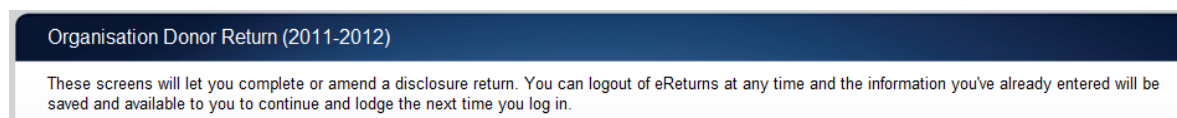
Progress through the wizard is tracked down the left-hand side.



As you navigate through the wizard, you will be prompted to enter the information which will make up the return.

## Step 1 – Organisation Details

On this screen you can update your organisation details. These details have been automatically pre-filled from your account.

**NOTE:** Individual donors will not see this screen, instead they will be taken directly to the Lodging officer details screen.

Once you have reviewed your organisation details click 'Next' to move to the Lodging Officer details screen.



On this screen you can review and update your details. Once you have reviewed your details click 'Next' to move to the Related organisations screen or if you are an individual donor you will go to Step 3.

## Step 2 - Related Organisations

The first screen that appears will allow you to record other business names that your company may operate under.
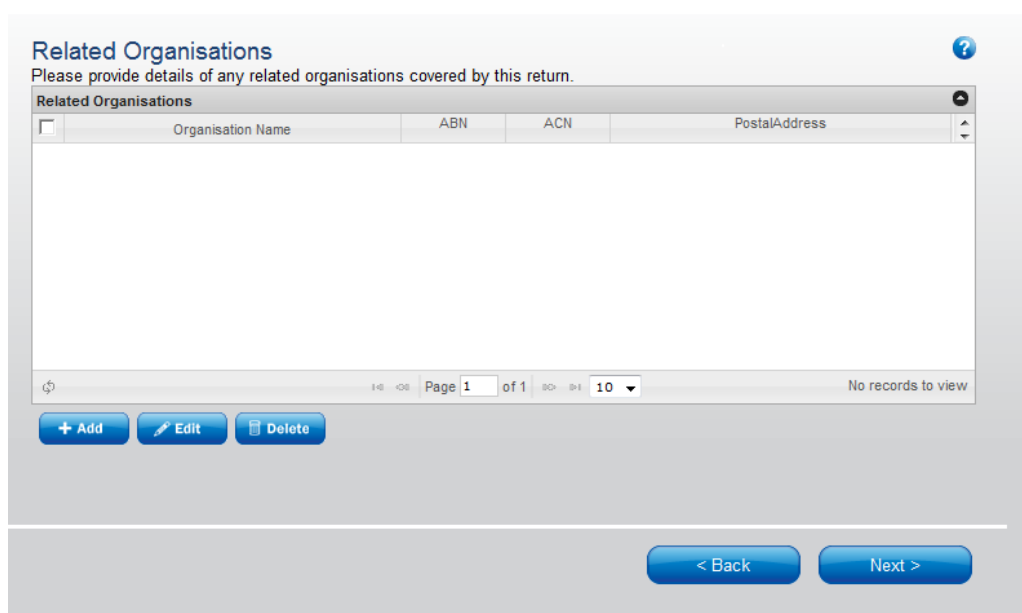


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To record other business names click the '+Add' button at the bottom of the table on the screen. This will launch the 'Add a Business Name' window.



In the 'Add a Business Name' window you can record any other names under which your company operates. Once you have entered a business name click the 'Add' button to add it to the list. The 'Add a Business Name' window will not close, allowing you to enter additional business names. Once you have finished adding all other business names click 'Close'. Then click 'Next' to move to the Related Organisations screen.

This screen will allow you to record details of related organisations that you are lodging on behalf of.



To record details of any related organisations use the '+Add' button below the table on the screen. This will launch the 'Add a Related Organisations' window.

You must fill in all of the mandatory fields in this window. Once you have entered the details of the related organisation click the 'Add' button, to add the related organisation to the list. The 'Add a related organisation' window will not disappear, allowing you to start entering the next related organisation. Once you have finished adding all related organisations, click 'Close'. Then click 'Next' to move to the Donations made screen.

## Step 3 – Donations made – Political Parties

This screen will allow you to record details of donations you have made to registered political parties during the financial year.

To record donations, click the '+ Add' button at the bottom of the table on the screen. This will launch the 'Add a donation made' window.



In the 'Add a donation made' window you can fill in the details of each donation. For each donation you must include the amount, transaction date and name of the political party the donation was made to. Once you have finished recording the details of a donation, click the 'Add' button, to add the donation to the list. The 'Add a donation made' window will not disappear, allowing you to start entering the next donation.

Once you have recorded all donations, click 'Close'. Then click 'Next' to move to the Donations received screen.

## Step 3 - Donations Made – Political Campaigners

This screen will allow you to record details of donations you have made to registered political campaigners during the financial year.

To record donations, click the '+ Add' button at the bottom of the table on the screen. This will launch the 'Add a donation made' window.



In the 'Add a donation made' window you can fill in the details of each donation. For each donation you must include the amount, transaction date and name of the political party the donation was made to. Once you have finished recording the details of a donation, click the 'Add' button, to add the donation to the list. The 'Add a donation made' window will not disappear, allowing you to start entering the next donation.

Once you have recorded all donations, click 'Close'. Then click 'Next' to move to the Donations received screen.

## Step 4 - Donations received

This screen will allow you to record details of the donations you have received. These are donations from other people, that you have used (wholly or partly) to make donations to political parties that you recorded at Step 3–Donations made.

To record donations you have received, click the '+ Add' button at the bottom of the table on the screen. That will launch the 'Add a donation received' window.



In the 'Add a donation received' window you can fill in the details of each donation received. For each donation that you have received you must include the name and address of the donor, if relevant the ABN and/or ACN, the transaction date and the amount. Once you have finished recording the details of a donation, click the 'Add' button, to add the donation to the list. The 'Add a donation received' window will remain open, allowing you to enter more donations.

Once you have recorded all donations received, click 'Close'. Then click 'Next' to move to the Notes screen.

You can also import donations received. For step by step instructions on importing donations received, refer to the 'Importing donations made' section of this guide
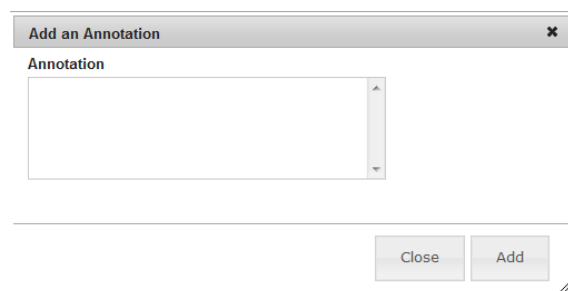
## Step 5 - Notes

The Notes screen allows you to record annotations against the return.
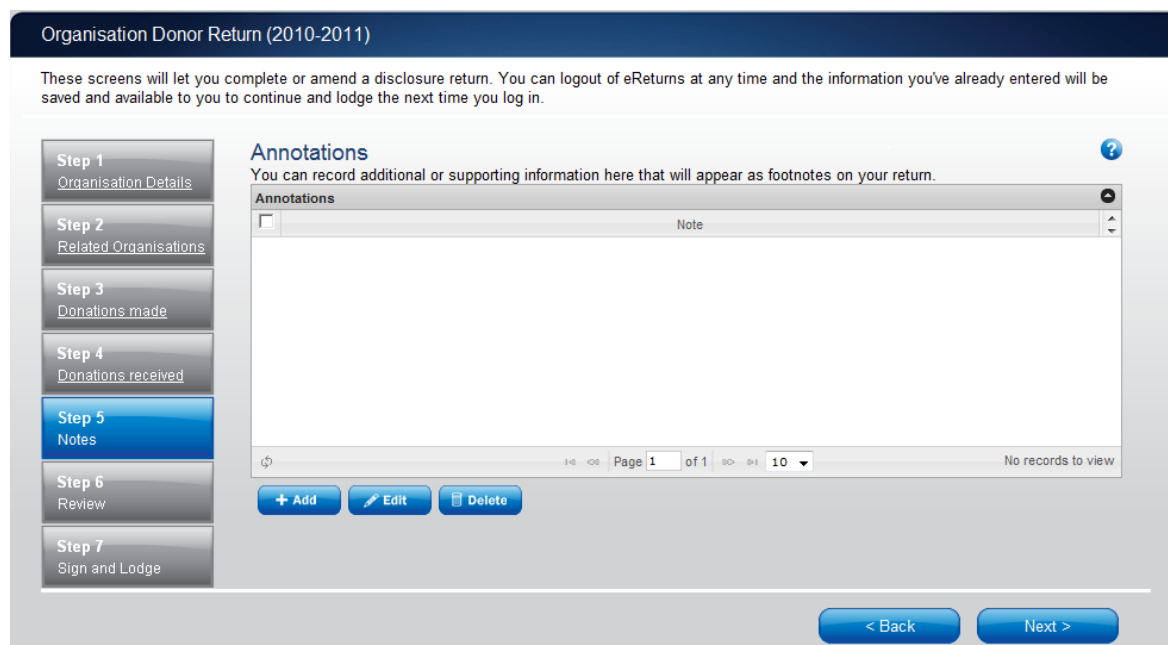


These annotations will be presented on the return as footnotes.

To add an annotation, click the '+Add' button at the bottom of the table on the screen. This will launch the 'Add an Annotation' window.



Enter the text of your annotation and click 'Add' to save it. Click 'Close' once you have entered all your annotations.

When you have finished recording annotations, click 'Next'.

## Step 6 - Review

The next screen is the review screen.

Here you will be presented with an image of what the data in your return will look like. Use the scroll bar on the right of the screen to view all of the pages of the return.

You will notice that there is nothing in the signature or date fields on the front of the return. These fields will only be populated once you have completed the lodgement screen and will appear on the final version of your return.

If you need to make changes to the data in the return, click 'Back'. Once you have reviewed the image of your return and all data is correct, click 'Next' .This will take you to the Sign and Lodge screen.

**NOTE**: At the bottom of this screen, above the 'Back' and 'Next' buttons is a checkbox that relates to lodging a Notice of Incomplete Return.

Where a donor is unable to obtain all the information required to fully complete a return, a Notice of Incomplete Return may be completed and lodged with the Donor to Political Party Disclosure Return. While it is unlikely that an individual donor would find themselves in circumstances where they would need to complete a Notice of Incomplete Return, an organisation donor may be unable to obtain all the information required to fully complete their return and therefore in those circumstances may need to complete a Notice of Incomplete Return. Should you find yourself in circumstances where it is necessary for you to lodge an incomplete return, checking this box will allow you to lodge a Notice of Incomplete Return.

For more detail on how to complete a Notice of Incomplete Return in eReturns, go to the [Lodging a Notice of Incomplete Return](#) section of this guide. For more information about when it is appropriate to lodge a Notice of Incomplete Return please consult the *Financial Disclosure Guide for Donors to Political Parties* available on the AEC's website at [www.aec.gov.au](http://www.aec.gov.au).

## Step 7 – Sign and Lodge

Once you have reviewed your return you will be able to lodge it with the AEC.



On this screen, you will need to tick the box next to the certification. Type your name into the Signature box and type your password into the Password box.

Once you have done this, click 'Lodge' to lodge your return.

Upon lodging your return you will be presented with a confirmation screen.



From this screen you may save a PDF copy of your return. The AEC recommends that you save a copy of your return in case you need to print or refer to it at a later date. The unique reference number presented on this screen is also recorded on the return form in

the bottom right hand corner. eReturns will also email you a copy of your lodged return by default.

# Completing a return - Individuals

## New Return

Click the 'New Return' button to start completing a new return.
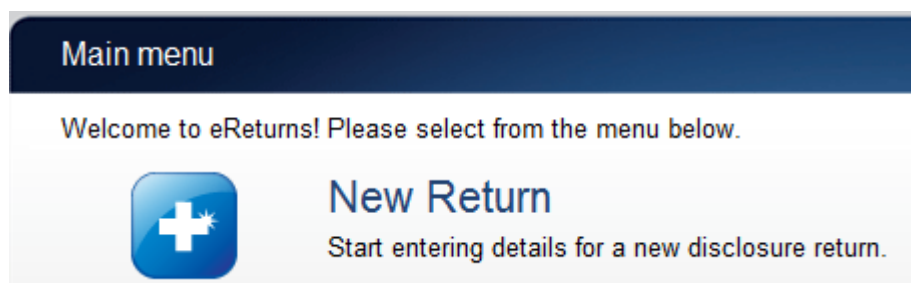


Then choose the return which you would like to complete. The actual list of returns that will appear will be dependent on whether you are an individual or organisation donor and whether you have lodged any returns previously. The example screen below is for an individual donor.
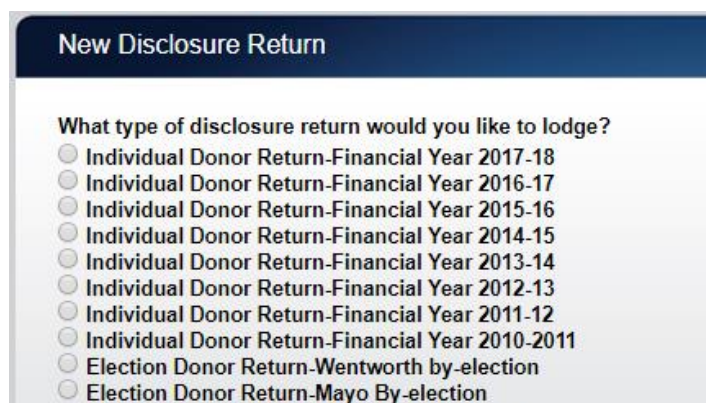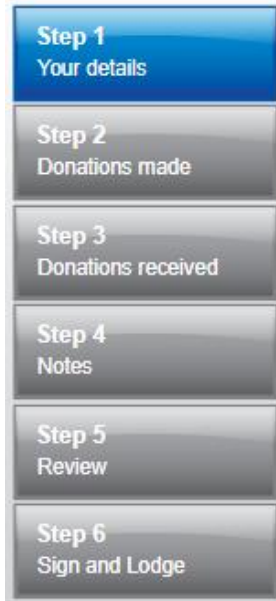


Click 'Continue' to launch the Return wizard. Similar to when you review your account details you can use the 'Back' and 'Next' buttons to navigate through the screens.

Instructions on how to complete the wizard will appear at the top of each page
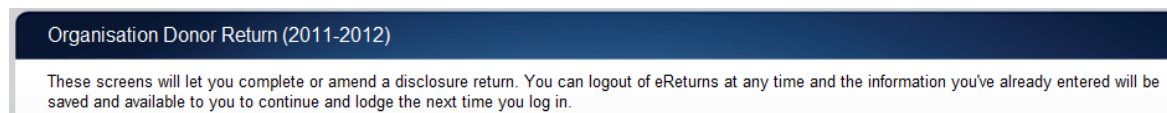
Progress through the wizard is tracked down the left-hand side.



As you navigate through the wizard, you will be prompted to enter the information which will make up the return.

## Step 1 – Individual donor details

On this screen you can update your details. These details have been automatically pre-filled from your account.



On this screen you can review and update your details. Once you have reviewed your details click 'Next' to move to the Donations made screen.

## Step 2 – Donations made – Political Parties

This screen will allow you to record details of donations you have made to registered political parties during the financial year.



To record donations, click the '+ Add' button at the bottom of the table on the screen. This will launch the 'Add a donation made' window.



In the 'Add a donation made' window you can fill in the details of each donation. For each donation you must include the amount, transaction date and name of the political party the donation was made to. Once you have finished recording the details of a donation, click the 'Add' button, to add the donation to the list. The 'Add a donation made' window will not disappear, allowing you to start entering the next donation.

Once you have recorded all donations, click 'Close'. Then click 'Next' to move to the Donations made – Political campaigners screen.

## Step 2 – Donations made – Political Campaigners

This screen will allow you to record details of donations you have made to registered political campaigners during the financial year.

As per the previous screens, use the '+ Add' button at the bottom of the table on the scree
to 'Add a donation made' to the list.
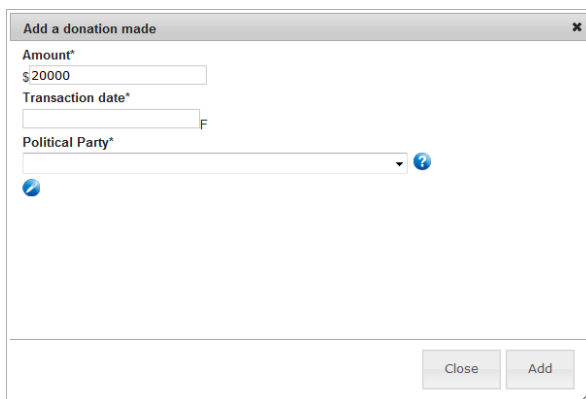


Once you have recorded all donations, click 'Close'. Then click 'Next' to move to the
Donations received screen.

## Importing donations made – Organisations and Individuals

Importing allows you to upload a spread sheet of transactions into the system, eliminating
the need to manually enter each transaction. In order to import donations made you will
need a spread sheet (either in MSExcel, CSV or XML format) which contains all of the
required information for each donation. To start importing donations click the 'Import'
button on the 'Donations made' screen.



This will launch the import screen

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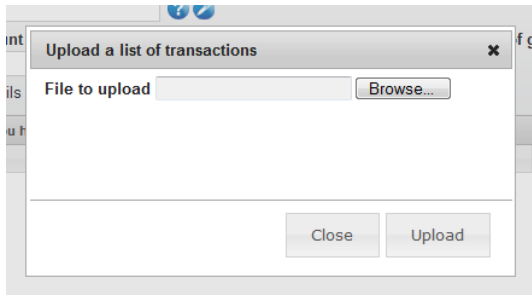
From here you can use the browse button to select the spread sheet you wish to upload from your computer.

Once you have selected the spread sheet, click 'Upload'.
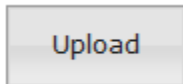


Once the system has uploaded your spread sheet it will ask you match the columns in your spread sheet to the columns in eReturns.
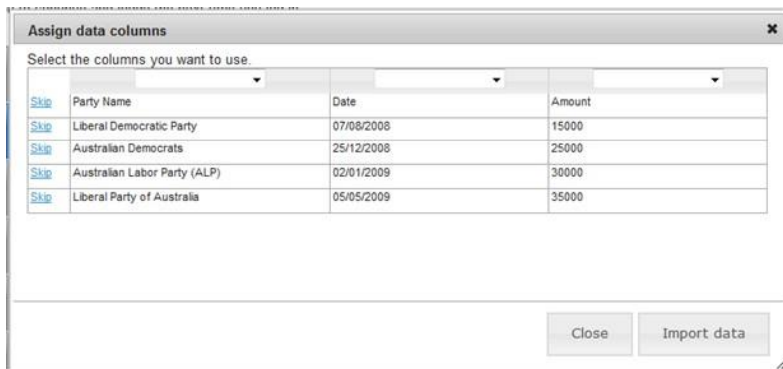


Once you have assigned all the columns, click 'Import data'.

Now eReturns will ask you to designate some of the values in some of the columns. You will need to assign values that eReturns recognises to some of the data in your spread sheet. See the example below:

Once you have matched the values from your spread sheet to values that eReturns will recognise you can click 'Assign'.

eReturns will tell you how many records were successfully imported, and list those which were not successful. You can also export the list of transactions which were not successfully imported from here. To close this window, click 'Close'.

If you choose to export the list of transactions which were not successfully imported you can fix the problems in the data which eReturns has identified and re-import that list. Alternatively, you can use the '+ Add' button to add those transactions manually.

eReturns will now upload the transactions from the spread sheet into the return wizard. Once it is complete you will be able to see the transactions in the list on the page.

Then click "Next' to move to the Donations received screen.

## Step 3 - Donations received

This screen will allow you to record details of the donations you have received. These are donations from other people, that you have used (wholly or partly) to make donations to political parties that you recorded at Step 2–Donations made.



To record donations you have received, click the '+ Add' button at the bottom of the table on the screen. That will launch the 'Add a donation received' window.



In the 'Add a donation received' window you can fill in the details of each donation received. For each donation that you have received you must include the name and address of the donor, if relevant the ABN and/or ACN, the transaction date and the amount. Once you have finished recording the details of a donation, click the 'Add' button, to add the donation to the list. The 'Add a donation received' window will remain open, allowing you to enter more donations.

Once you have recorded all donations received, click 'Close'. Then click 'Next' to move to the Notes screen.

You can also import donations received. For step by step instructions on importing donations received, refer to the 'Importing donations made' section of this guide

## Step 4 - Notes

The Notes screen allows you to record annotations against the return.



These annotations will be presented on the return as footnotes.

To add an annotation, click the '+Add' button at the bottom of the table on the screen. This will launch the 'Add an Annotation' window.



Enter the text of your annotation and click 'Add' to save it. Click 'Close' once you have entered all your annotations.

When you have finished recording annotations, click 'Next'.

## Step 5 - Review

The next screen is the review screen.



Here you will be presented with an image of what the data in your return will look like. Use the scroll bar on the right of the screen to view all of the pages of the return.

You will notice that there is nothing in the signature or date fields on the front of the return. These fields will only be populated once you have completed the lodgement screen and will appear on the final version of your return.

If you need to make changes to the data in the return, click 'Back'. Once you have reviewed the image of your return and all data is correct, click 'Next' .This will take you to the Sign and Lodge screen.

**NOTE**: At the bottom of this screen, above the 'Back' and 'Next' buttons is a checkbox that relates to lodging a Notice of Incomplete Return.

Where a donor is unable to obtain all the information required to fully complete a return, a Notice of Incomplete Return may be completed and lodged with the Donor to Political Party Disclosure Return. While it is unlikely that an individual donor would find themselves in circumstances where they would need to complete a Notice of Incomplete Return, an organisation donor may be unable to obtain all the information required to fully complete their return and therefore in those circumstances may need to complete a Notice of

Incomplete Return. Should you find yourself in circumstances where it is necessary for you to lodge an incomplete return, checking this box will allow you to lodge a Notice of Incomplete Return.

For more detail on how to complete a Notice of Incomplete Return in eReturns, go to the Lodging a Notice of Incomplete Return section of this guide. For more information about when it is appropriate to lodge a Notice of Incomplete Return please consult the *Financial Disclosure Guide for Donors to Political Parties* available on the AEC's website at www.aec.gov.au.

## Step 6 – Sign and Lodge

Once you have reviewed your return you will be able to lodge it with the AEC.



On this screen, you will need to tick the box next to the certification. Type your name into the Signature box and type your password into the Password box.

Once you have done this, click 'Lodge' to lodge your return.

Upon lodging your return you will be presented with a confirmation screen.



From this screen you may save a PDF copy of your return. The AEC recommends that you save a copy of your return in case you need to print or refer to it at a later date. The unique reference number presented on this screen is also recorded on the return form in

the bottom right hand corner. eReturns will also email you a copy of your lodged return by default.

# Lodging a Notice of Incomplete Return

eReturns will allow you to lodge a Notice of Incomplete Return online. For more information about when it is appropriate to lodge a Notice of Incomplete Return please consult the *Financial Disclosure Guide for Donors to Political Parties* available on the AEC's website at www.aec.gov.au.

To lodge a Notice of Incomplete Return in eReturns you will need to tick the checkbox at the bottom of the review screen.



Selecting this box will take you to the Notice of Incomplete Return screen.



Here you are required to fill in the fields, detailing the information that is missing from your return, the reason why you were unable to obtain that information, who you believe may

have the information which is missing, and why you believe that person has it. Once you have completed all of the fields on the screen, click 'Next' to review the Notice of Incomplete Return.



Once you have reviewed your Notice of Incomplete Return you can click 'Next' to go to the Sign and Lodge screen. For detailed instruction on lodging your return and Notice of Incomplete Return please refer to Step 7 'Sign and Lodge' of this guide.

# Amending a Return

Returns lodged using eReturns can also be amended using eReturns. To amend a return click the 'View Returns' button on the main menu.

The view returns screen will display.
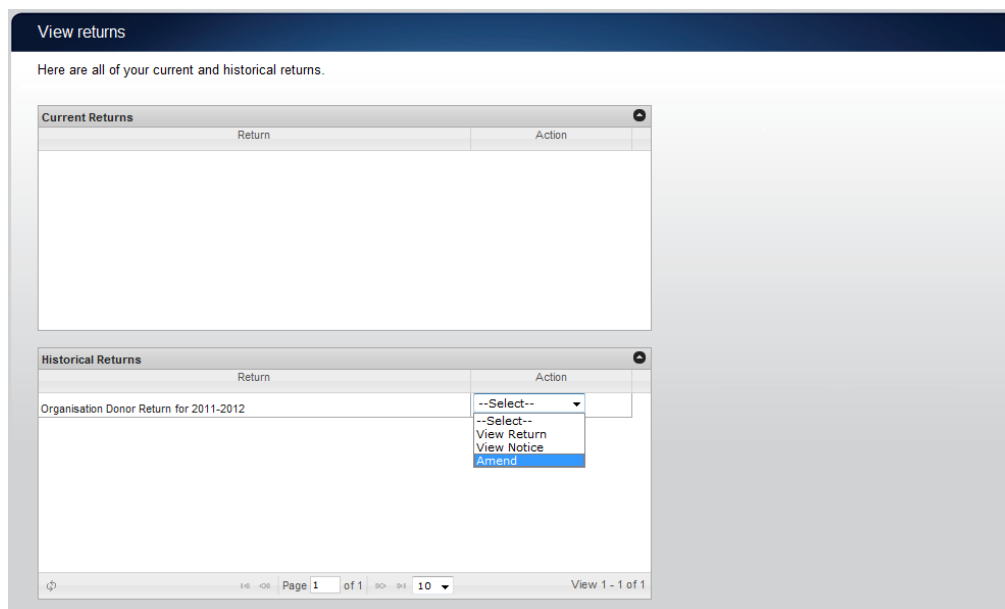


Use the 'Amend' option in the drop down list next to the return you wish to amend. Only returns lodged online can be amended online.

This will launch the amendment wizard. The amendment wizard is exactly the same as the return wizard, except it already contains all of the data from your original return. To amend something, simply add, edit or delete as appropriate. Once you have finished working your way through the wizard, eReturns will generate an amendment form for you to review which will detail the changes. This amendment form can be lodged just like the original return.

# Creating an account

Donors can register online and create an account for themselves instead of waiting for an obligation letter with credentials. To do this, go to https://ereturns.aec.gov.au.



This is the eReturns homepage. To create an account, click 'Create an eReturns account'. This will take you through a wizard to create your account.

To navigate through the wizard use the 'Back' and 'Next' buttons at the bottom right of the screen.

The first screen will ask you to select the type of return you need to complete. For donors this will either be a 'Donor to Political Party Disclosure Return – Individuals' or a 'Donor to Political Party Disclosure Return – Organisations'.



Once you have selected the type of disclosure return click 'Next'.

If you selected an Organisation Donor Return the following screen will appear and you will need to enter the details of the organisation you are lodging on behalf of.

**NOTE:** Individual donors will not see this screen, instead they will be taken directly to the Your details screen.



Once complete, click "Next' and the Your details screen will appear.

On this screen you must enter your details as the person responsible for lodging the return. Please ensure you enter your email address correctly as eReturns uses email for validation and to send you copies of any returns which you lodge.

Once you have completed entering your details click 'Next' to move to the Account details screen.



On this screen you will be asked to choose a user name and password for your account and provide some secret information which can be used to verify your identity over the phone if you need to contact the Help Desk.

Once you have completed entering all the information requested, click 'Next'. A confirmation screen will appear advising you to verify your account by clicking a link in an email which will be sent to the email address that you provided.

The email sent to you will look like this.



The email account linked to your eReturns account has changed. Please activate your eReturns account by clicking this link https://ereturnstest.dev.aec.local/RegistrationWizard/ActivateAccount?activationCode=EE8C054585CD0B3C0762107FFD128271. Alternatively copy the link into your browsers address bar.

If you have any queries, please contact the Funding and Disclosure section by phone on 02 6271 4552 or by email at fad@aec.gov.au

**Disclosure Unit**
Funding and Disclosure | National Office
Australian Electoral Commission
T: (02) 6271 4552 | F: (02) 6271 4555

When you click the link in the email you will get a confirmation that the verification has succeeded.



**Activation complete**

You have successfully activated your account. You can login to the eReturns site using the user name and password you provided during registration.

You can now log in to your eReturns account using the credentials you created at the Account details screen.

# Troubleshooting

## Forgotten Password

If you have forgotten your password, you can reset it online. This can be done using the forgotten password link on the eReturns front page. eReturns will send you an email with a new single use password in it.



Clicking forgotten password will take you to the password reset screen where you will need to enter your user name and the CAPTCHA text on screen.

Alternatively you can contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au.

# Forgotten User name

If you have forgotten your user name, you can retrieve it online. This can be done using the forgotten user name link of the eReturns front page. eReturns will send you an email containing your user name.



Clicking forgotten user name will take you to the user name retrieval screen where you will need to enter your email address and the CAPTCHA text on screen.

Alternatively you can contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au.

**Note –** If there is more than one user name related to an email address eReturns will not be able to retrieve your user name online. You will need to contact Funding and Disclosure to retrieve you user name in this instance.

# Other problems

If you experience any difficulties while using eReturns, please contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au.