

# **eReturns**

Candidate and Senate Group Quick Reference Guide



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# The basics

#### Common icons

# 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. 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 emailed or posted to candidate agents in an obligation letter following the election. If a candidate has not nominated an agent, they are considered to be their own. An example of eReturns credentials in an obligation letter are:

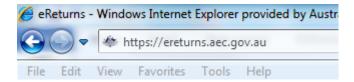
User name: AdminTestDonor

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.

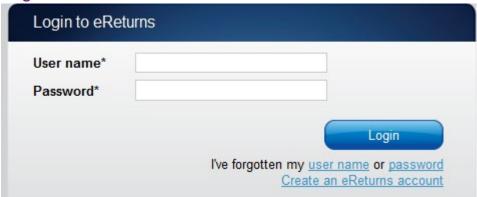




eReturns is a secure website which means you must type 'https://' at the beginning of the URL.

At the eReturns webpage the following login screen will appear.

#### Login to eReturns



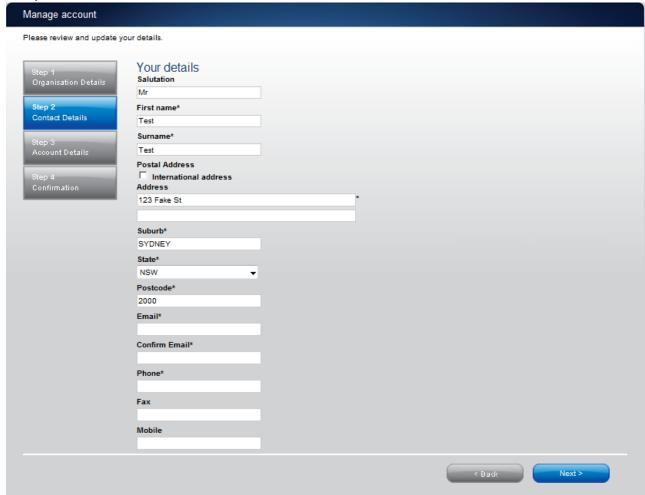
Enter your user name and password provided in your obligation letter and click 'Login'.

#### On first login

The first time you log in to eReturns you will be prompted to verify your details. To navigate through the eReturns wizard use the 'Back' and 'Next' buttons at the bottom right of the screen.



Step 1: Contact details



On this screen you can update your details. These details have been automatically pre-filled from the details that you have supplied to the Australian Electoral Commission.

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

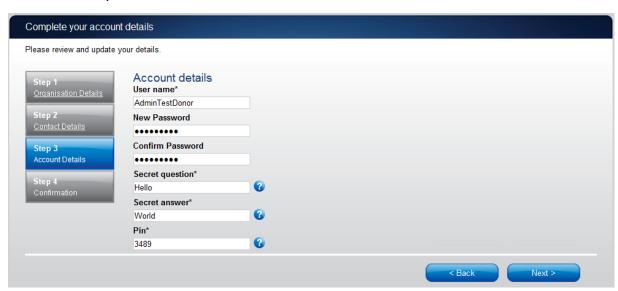
Once you have updated your details click 'Next' to move to the Account details screen.

#### Step 2: 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.



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

#### Step 3: Confirmation

#### Account successfully updated

As your email address has changed, an email verification request has been sent to your new email address.

Please click on the link in the email when it arrives and your account will be activated.

You can continue to use eReturns now, however you must activate your account to lodge a disclosure return or re-login to eReturns.

You can now use eReturns.

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 by clicking on the link in the email.** 

The email account linked to your eReturns account has changed. Please activate your eReturns account by clicking this link <a href="https://ereturnstest.dev.aec.local/RegistrationWizard/ActivateAccount?activationCode=EE8C054585CD0B3C0762107FFD128271">https://ereturnstest.dev.aec.local/RegistrationWizard/ActivateAccount?activationCode=EE8C054585CD0B3C0762107FFD128271</a>. 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

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

#### 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.

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

#### Login

Click the 'Main menu' button to return to the eReturns main menu.



# Using eReturns

#### Main Menu

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



From the main menu you can lodge multiple nil returns, 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.

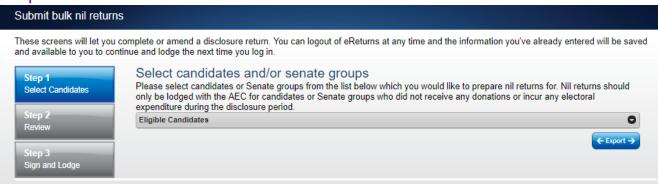
### Completing a return

#### Nil Returns (including bulk lodgement)

eReturns allows you to lodge multiple nil returns at the same time. A candidate or candidate agent should lodge a nil return if the candidate did not receive any donations, incur electoral expenditure or, for the 2019 Federal election, receive any discretionary benefits. This most commonly occurs when a party endorses a candidate and manages the campaign on their behalf.

To lodge one or more nil returns, click 'Nil return' on the main menu.

#### Step 1 - Select Candidates



To select a candidate for a nil return, click the check box to the left of that candidate's name.

To select all candidates in the list, click the check box in the top left corner of the table, underneath 'Eligible Candidates'.

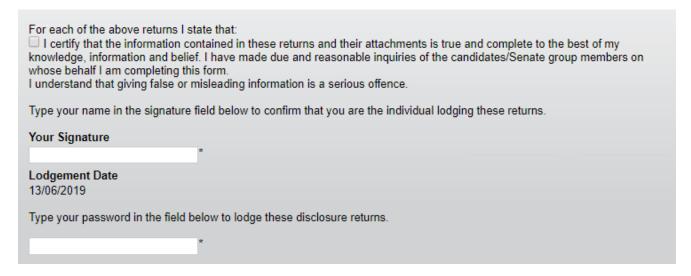
Once you have identified all the candidates for whom you will lodge a nil return, click the 'Next' button. If you have not selected all the listed candidates, the system will ask you to verify your choices.

#### Step 2 – Review

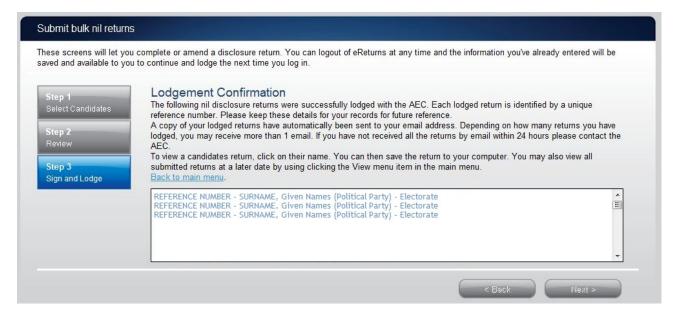
From this screen, you may view the draft returns for each candidate. Click a candidate's name to view their return. When you are happy with each candidate's return click the 'Next' button.

#### Step 3 – Sign and Lodge

The final step to lodging one or more nil returns is to certify that the information is correct and to electronically sign. If you are sure that the information contained within the returns is correct, click the first check box. You will then need to type your name in the following box to act as an electronic signature. Finally, type your password into the final box. This step is to verify that the candidate agent is lodging the returns.



Once you have completed these steps, click the 'Lodge' button and the returns will be submitted.



From this screen you may save a PDF copy of any of the returns. 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.

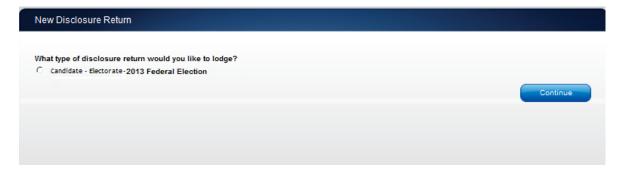
#### **New Return**

To complete a candidate or Senate group return where the candidate or Senate group received donations, incurred political expenditure or, for the 2019 Federal election, received discretionary benefits use the 'New Return' button on the main menu.

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



You will then need to choose which candidate the return will be for.



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.

#### Step 1 - Candidate details

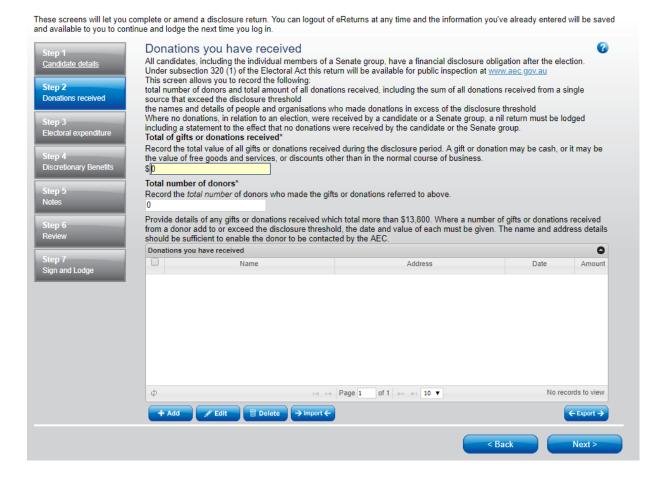
These screens will let you complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved and available to you to continue and lodge the next time you log in.



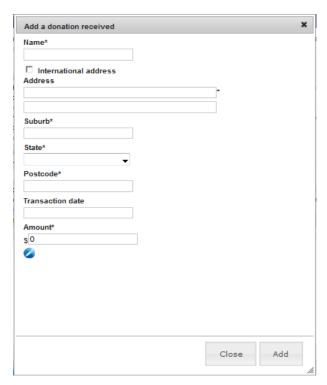
On this screen the Candidate name, Party name, Electorate Contested, and Name of agent fields will be pre-populated with the information from the nomination form for the candidate.

#### Step 2 – Donations received

Total donations and number of donors can be recorded directly into this screen.



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



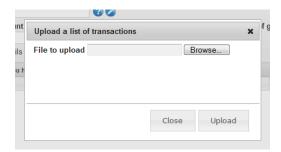
In the 'Add a donation received' window you can fill in the details of each detailed donation. All required fields must be completed. Once all the information has been entered click the 'Add' button to add the receipt to the list. The 'Add a donation received' window will remain open to allow you to enter more receipts. Once you have finished entering receipts click the 'Close' button to return to the receipts screen.

#### Import receipts

The import function allows you to upload a spread sheet of transactions into eReturns, eliminating the need to manually enter each transaction. In order to import receipts you will need a spread sheet (either in MSExcel, CSV or XML format) of receipts which contains all of the required information for each receipt. To start importing receipts click the 'Import' button.



This will launch the import screen.



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'.

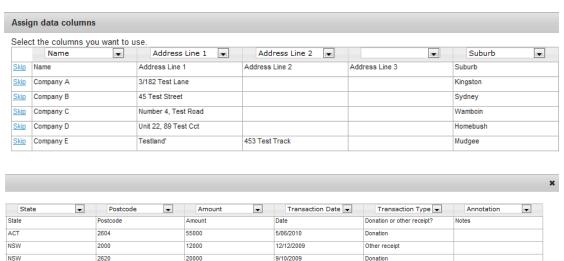


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Once the eReturns has uploaded your spread sheet it will ask you to match the columns in your spread sheet to the columns in eReturns.



3/04/2010

30/2/2010

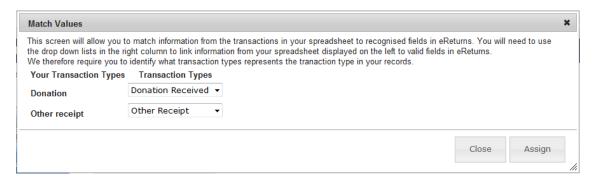
Once you have assigned all the columns, click 'Import Data'.

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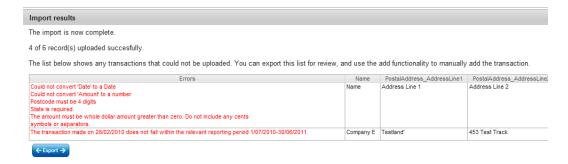
Now eReturns will ask you to designate some of the values in some of the columns. You will need to assign values that eReturns recognises to some of the data in your spread sheet. See the example below:

Other receip

Other receipt



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 screen. Once you have finished on the receipts screen click 'Next' to move to the payments screen.

#### Step 3 – Electoral Expenditure

This screen will allow you to record total electoral expenditure incurred in relation to the election. Once you have recorded your electoral expenditure, click 'Next' to move to the Annotations screen.

These screens will let you complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved and available to you to continue and lodge the next time you log in.

Step 1
Candidate details

Electoral expenditure
Electoral expenditure or with the authority of a candidate in relation to an election must be reported.

Electoral Expenditure\*
\$\[ 0 \]

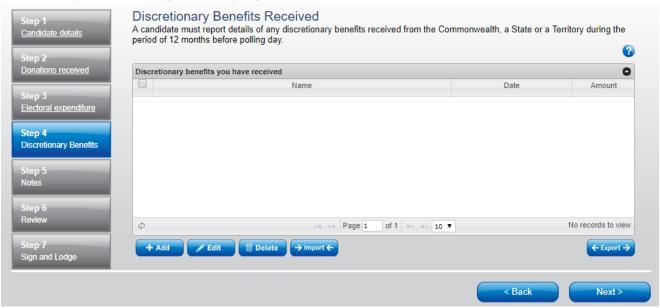
Donations received



#### Step 4 - Discretionary Benefits

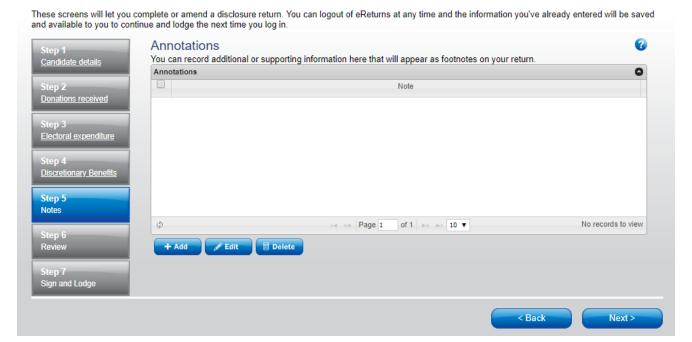
This screen will allow you to record any discretionary benefits received from the Commonwealth, a State or a Territory during the period of 12 months before polling day. Once you have recorded your discretionary benefits, click 'Next' to move to the Annotations screen.

These screens will let you complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved and available to you to continue and lodge the next time you log in.



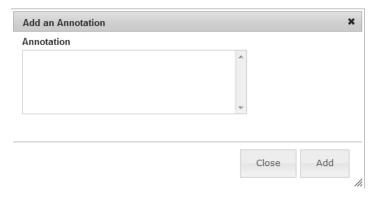
#### Step 5 - Notes

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. 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

From this screen, you may view the draft return.

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'll 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.

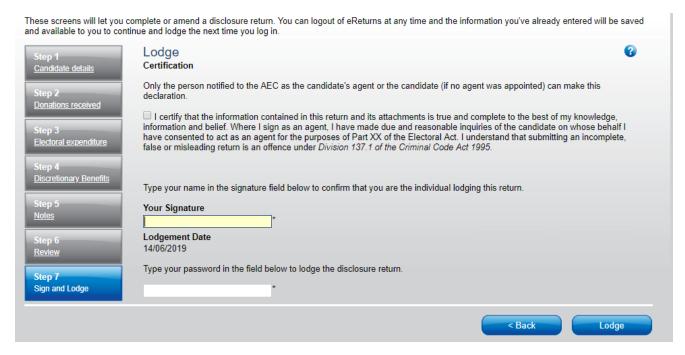
If you need to make changes to the data in the return, click 'Back'. Once you have reviewed the image of your return and all data is correct, click 'Next' . This will take you to the Sign and Lodge screen.

**NOTE:** At the bottom of this screen, above the 'Back' and 'Next' buttons is a checkbox. Selecting this box will allow you to lodge a Notice of Incomplete Return. For more detail on this, go to the Lodging a Notice of Incomplete Return section of this guide.

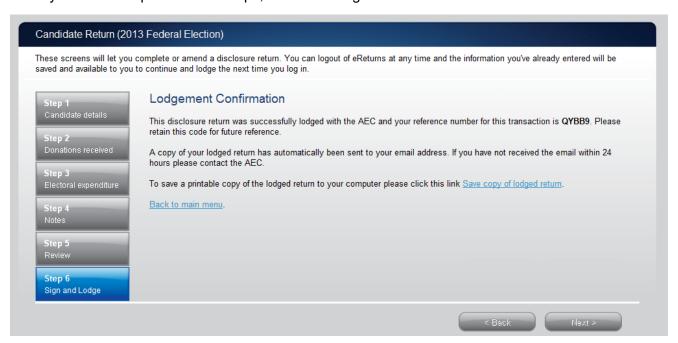
When you are happy with the candidate's return click the 'Next' button.

#### Step 7 – Sign and Lodge

The final step to lodging the return is to certify that the information is correct and to electronically sign. If you are sure that the information contained within the returns is correct, click the first check box. You will then need to type your name in the following box to act as an electronic signature. Finally, type your password into the final box. This step is to verify that the candidate agent is lodging the return.



Once you have completed these steps, click the 'Lodge' button and the return will be submitted.



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.

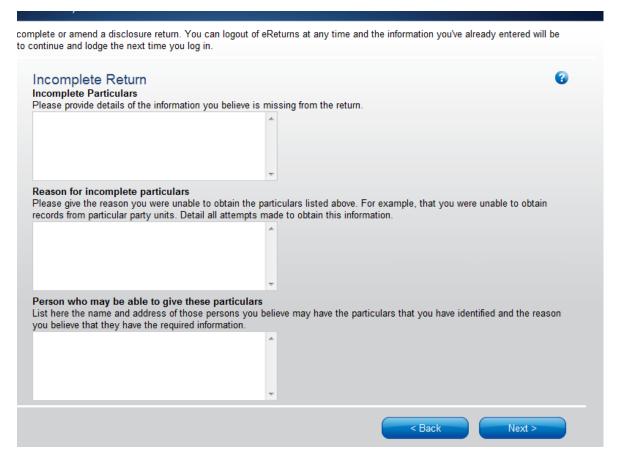
#### Lodging a Notice of Incomplete Return

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 <u>Financial Disclosure</u> <u>Candidates and Senate Groups</u> available on the AEC's website at <u>www.aec.gov.au</u>.

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



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



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 click 'Next' to go to the Sign and Lodge screen. To lodge your return and Notice of Incomplete Return follow the instructions at Step 7 – Sign and Lodge of this guide.

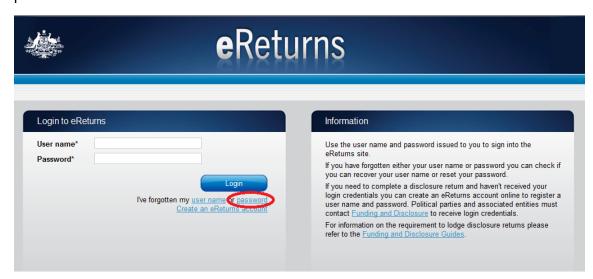
# Amending a Return

If you need to amend your return contact Disclosure & Compliance on 02 6271 4552 or by email at fad@aec.gov.au.

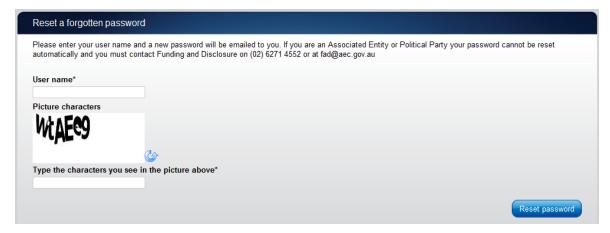
# **Troubleshooting**

# 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.



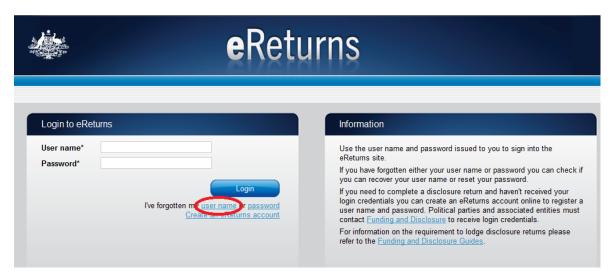
Clicking forgotten password will take you to the password reset screen where you will need to enter your user name and the CAPTCHA text on screen.



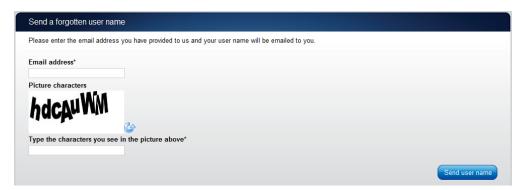
Alternatively you can contact Disclosure and Compliance on 02 6271 4552 or by email at fad@aec.gov.au.

# 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 Disclosure and Compliance 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 Disclosure and Compliance to retrieve you user name in this instance.

# Other problems

If you experience any difficulties while using eReturns, please contact Disclosure and Compliance on 02 6271 4552 or by email at <a href="mailto:fad@aec.gov.au">fad@aec.gov.au</a>.