eReturns Guide for Referendum Donors



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Disclosure and Compliance Australian Electoral Commission Locked Bag 4007 Canberra ACT 2601

Email: <u>fad@aec.gov.au</u> Phone: 02 6271 4552

www.aec.gov.au

Published 13 October 2023

Electoral Commission



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Common icons and useful information

Common icons

lcon	What it does
0	This is the help icon. If you click on this icon, further information will be displayed.
	This is the close icon. Clicking on this icon will close the help text that is displayed.
0	This is the annotation icon. Where this icon appears, you can record further information. Any information you record in an annotation will be presented on the final return as a footnote.

Useful information

Saving

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

Required information and fields

All required fields are marked with an asterisk (*).



Creating an eReturns account

Accessing eReturns

All referendum donors will need to create an eReturns account to lodge a referendum return.



A <u>financial disclosure entity</u> will *not* be able to use their existing eReturns account - a new eReturns account must be created for referendum returns.

Getting started

eReturns can be accessed at https://ereturns.aec.gov.au/.



The eReturns webpage displays the following login screen. Click 'Create an eReturns account'. This will take you through a wizard to create your account.

Login to eReturns	
User name* Password*	
	Login I've forgot <mark>en my <u>user name</u> or password Create an eReturns account</mark>



Create an eReturns account

The first screen requires you to select the type of eReturns account you need to set up, this will determine what type of referendum disclosure return you need to complete. Select 'Referendum entity or donor'.

The next screen will allow you to select either an organisation or individual donor.

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

Create an eReturns account				
Select the type of eReturn	account you require. This will take you through a wizard to create your account.			
Step 1 Start Step 2 Organisational details Step 3 Account details Step 4 Finish	eReturns account type What type of eReturn account do you need to complete? O Donor (annual and/or election) Third party Referendum entity or donor			
			Next >	

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

Select either 'Referendum organisation donor' or 'Referendum individual donor' from the eReturn account types:

Create an eReturns account				
Select the type of eReturn acco	unt you require. This will take you through a wizard to create your account.			
Step 1 Step 2 Organisational details Step 3 Account details Step 4 Finish	Referendum entity, individual donor or an organisation donor?			
	< Back Next >			

Once you have selected the 'Referendum organisation donor' or 'Referendum individual donor' click 'Next'.

The next few pages detail the 'Referendum organisation donor' account creation. The 'Referendum individual donor' account creation commences on page



Organisation donor

1. If you selected 'Referendum organisation donor', the 'Step 2 – Organisation details' screen requires you to enter the details of the **organisation** you are lodging on behalf of (shown below).

Create an eReturns a	ccount
Select the type of eReturn	account you require. This will take you through a wizard to create your account.
Step 1 <u>Start</u>	Organisation details Organisation Name*
Step 2 Organisational details	ABN
Step 3 Account details	
Step 4	☐ International address Address *
	Suburb*
	State*
	Postcode*
	< Back Next >

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

2. The below 'Your details' screen is for **organisation donors** to provide details of the lodging officer, or person responsible for lodging the disclosure return, as below, once complete select 'Next', to progress to the 'Account details' screen.

Create an eReturns a	ccount				
Select the type of eReturn a	account you require. This will tak	ke you through a wizard to creat	e your account.		
Step 1 <u>Start</u>	Your details Salutation				
Step 2 Organisational details	First name*				
Step 3	Surname*				
Step 4	Capacity*	0			
Finish	Postal Address International address Address				
	99 Ninth Street		*		
	Suburb*				
	State*				
	VIC	~			
	Postcode*				
	3518				
	Email*				
	Confirm Email				
	Phone*				
	Fax				
	Mobile				
				< Back	Next >



3. On the 'Account details' screen you will need to set a username and password for the **organisation** donor eReturn account.

Create an eReturns account			
Select the type of eReturn a	ccount you require. This will take you thr	ough a wizard to create your account.	
Step 1 <u>Start</u>	Account details User name*		
Step 2 Organisational details	New Password		
Step 3	Confirm Password		
Account details	Picture characters		
Step 4 Finish	gYDNh3	•	
	Type the characters you see in the	picture above*	
			< Back Next >

Individual donor

1. The below screen will appear for **individual** donor eReturn account creation.

Create an eReturns ac	ccount				
Select the type of eReturn a	account you require. This will ta	ake you through a wizard to crea	ate your account.		
Step 1 <u>Start</u>	Your details Salutation				
Step 2 Organisational details	First name*				
	Furnamat				
Step 3	Name				
Account details Step 4	Postal Address International address Address				
Finish	12 Three Street		*		
	Suburb*				
	MELBOURNE				
	State*				
	VIC	~			
	Postcode*				
	3001				
	Email*				
	test.email@email.com				
	Confirm Email				
	test.email@email.com				
	Phone*				
	12346321				
	Fax				
	Mahila				
	woone				
				< Back	Next >

Please note: Once complete, click 'Next', the eReturn account set-up will skip 'Step 3' as it is not relevant to individual donors. The next screen is the 'Account details' screen.



Create an eReturns account			
Select the type of eReturn a	account you require. This will take you through a wizard to create your account.		
Step 1 Start	Account details User name*		
Step 2 Organisational details	New Password		
Step 3	Confirm Password		
Account details	Picture characters		
Step 4 Finish	qC@_cZ		
	Type the characters you see in the picture above*		
	< Back Next >		

To access eReturns you need to provide a valid email address. This email is used to identify you as an eReturns user. eReturns uses email for validation and to send you copies of returns you lodge. After the initial sign-up process, eReturns will send a confirmation to your nominated email address.

Click on the link in the email before you lodge your return or log back into eReturns. (If you cannot find an email from eReturns, check your junk mail/spam folder.)

Confirmation

Please review and update	e your details.
Step 1 Organisation Details Step 2 Contact Details Step 3 Account Details Step 4 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 <u>eReturns</u> .

Please note: the 'Confirmation' step above, details that your 'email address has changed', this is simply directing you to the verification email to 'Activate' your account.

Email activation and verification

eReturns will automatically generate an activation email and send it to your email address so you can verify the email associated with the account.

Your eReturns account **needs to be activated** by using the link emailed to you. The below is an example of the email content.

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.

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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, please click the 'Main menu' button to return to the eReturns main menu.





Using AEC issued credentials to access eReturns

Note: An existing eReturns account **cannot be used for referendum returns** - the new eReturns account provided must be used.

eReturns credentials are emailed or posted out to donors in an obligation letter when they are named on a referendum entity disclosure return as donating to the referendum entity.

Your eReturns credentials will look like this in your obligation letter:

User name:	AdminReferendumdonor1
Password:	42mZ2m8V

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.

When using AEC issued credentials, you will need to review and update your details:

Complete your accou	unt details
Please review and update	your details.
Step 1 Organisation Details	Organisation details Please correct the following errors: First name is required.
Step 2 Contact Details	Surname is required. Phone number is required.
Step 3 Account Details	The question used to retrieve the password is required. The answer to the question used to retrieve the password is required. 4 digit pin for account identification is required.
Step 4 Confirmation	Email is required. You have been issued a temporary password which now must be changed Organisation Name*
	Referendum donor 2
	ABN
	ACN
	International address Address 13 Test Place *
	Suburb* CONARA
	State* TAS V Postcode*
	7211
	< Back Next >

Follow Steps 1 through 4 to update your account and verify your email address.

Once your account is verified, you will be able to commence a new return.



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**. The next sections in the guide explain a new return for **organisations**, followed by a new return for **individuals**.

If you have commenced a return you will also have the option to **continue** a return.

From the main menu you can also **view** historical returns and **manage** your account details. The 'View Returns' option will only appear once you have commenced or submitted a return.

NOTE: Your account details are the details that 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. Referendum disclosure was introduced in 2023, so no earlier returns will be available. The example screen below is for an organisation donor.

New Disclosure Return	
What type of disclosure return would you like to lodge? Referendum Organisation Donor Return-2023 Referendum	Continue

Click 'Continue' to launch the return wizard. 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 screen. 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.

NOTE: These details have been automatically pre-filled from the information you provided in your account registration.

hese screens will let you nd available to you to co	complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be say thinue and lodge the next time you log in.
Step 1 Organisation Details	Referendum Organisation Donor details Referendum Organisation Donor Name* OrgRefDonor 2
Step 2 Donations made	ABN
Step 3	ACN 🕜
Step 4	International address Address
Review	13 Test Place
Step 5 Sign and Lodge	Suburb* CONARA
	State* TAS
	Postcode* 7211
	< Back Next >

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

These screens will let you complete and available to you to continue a Step 1 Organisation Details Step 2 Donations made Step 3 Notes Step 4 Review Step 5 Sign and Lodge	ete or amend a disclosure retur and lodge the next time you log odging Officer Detail alutation irst name* estname urname apacity* EFO ostal Address Jinternational address ddress 3 Test Place	m. You can logout of eReturns at any time and the information you've already entered will be save g in.
Step 1 Step 2 Organisation Details Fi Step 2 Step 3 Notes Step 4 Review Pression Step 5 Sign and Lodge Step 5 Step 7	odging Officer Detail alutation irst name* estname urname* surname apacity* SFO ostal Address Jinternational address ddress 3 Test Place	
Step 1 Creanisation Details Step 2 Fill Donations made Fill Step 3 Step 3 Notes Color Step 4 Color Review Policity Step 5 Step 3 Sign and Lodge Step 3	odging Officer Detail alutation irst name* estname urname* Surname apacity* SFO ostal Address Jinternational address ddress 3 Test Place	is
Organisation Details St Step 2 Donations made Fit Step 3 Notes St Step 4 Review Pe Step 5 Sign and Lodge Aa Step 5 Step 7 Step 7 St	autation irst name* estname turname* burname apacity* FO ostal Address Unternational address ddress 3 Test Place	©
Step 2 Fi Donations made Si Step 3 Si Notes Ca Step 4 Pa Review Pa Step 5 Sign and Lodge Step 7 Si	irst name* estname urname* apacity* FO ostal Address Unternational address ddress 3 Test Place	♥
Step 3 Notes Step 4 Review Step 5 Sign and Lodge	urname* urname* apacity* FO ostal Address Unternational address ddress 3 Test Place	♥
Step 3 Notes Step Sign 4 Review Step 5 Sign and Lodge AA Step 5 Sign 2 Step 5 Sign 2 Step 5 Sign 2 Step 5 Sign 2 Step 5 Sign 2 Step 5 Step 7 Step 5 Step 7 Step 5 Step 7 Step 5 Step 7 Step 7	urname* burname apacity* FO ostal Address International address ddress 3 Test Place	•
Step 3 Notes Step 4 Review Step 5 Sign and Lodge	apacity* apacity* FO ostal Address International address ddress 3 Test Place	•
Notes CC Step 4 Review PP Step 5 Sign and Lodge 11 St CC St T	apacity* FO ostal Address International address ddress 3 Test Place	•
Step 4 Review Pr Step 5 Sign and Lodge 12 Sign and Lodge St C Sign and Lodge St C C Sign and Lodge St C C Sign and Lodge St C C C C Pr C Pr C Pr C Pr C Pr C Pr C	FO ostal Address International address ddress 3 Test Place	•
Step 4 Review P4 Step 5 Sign and Lodge 12 Sign CC St T	ostal Address International address ddress 3 Test Place	
Step 5 Sign and Lodge	ostal Address International address ddress 3 Test Place	
Step 5 Sign and Lodge	ddress 3 Test Place	
Sign and Lodge	3 Test Place	*
St C St T		
Si C St T		
C St T	uburb*	
St T.	ONARA	
T.	tate*	
Dr	ras 🗸	
	ostcode*	
72	211	
Er	mail*	
R	Refdonor.org@email.com	
Co	onfirm Email	
Pr	hone*	
32	2144123	
Fa	ax	
M	lobile	
		< Back Next >

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



Step 2 – Donations made to Referendum Entities

This screen will allow you to record details of donations you have made to referendum entities during the referendum expenditure period.

Organisation Details	Donations you h	ave made		
		Name	Address	Date Amou
itep 3				
lotes				
tep 4				
tep 4 eview				
itep 4 eview tep 5				
tep 4 eview tep 5 ign and Lodge		14 - 4	Page 1 of 1 10 V	No records to vier

To record donations, click the '+ Add' button. This will launch the 'Add a donation' window.

Add a donation	×
Name*	
ADN	
ADN	
ACN	
Address	
	*
Suburb*	
State*	
✓	
Postcode*	
Transaction date*	
Amount*	1
]
-	
	Close Add

In the 'Add a donation' window you can fill in the details of each donation. For each donation you must include the amount, transaction date and name of the referendum entity 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' window will not disappear, allowing you to start entering the next donation. After you have recorded all donations, click 'Close'.



The list of donations will populate as you add them. Once you have recorded all relevant donations, click 'Next' to move to the Notes screen.

Step 1	Donations you	have made to Ret	ferendum Entities		0
<u>Diganisation Details</u>	Donations you have ma	Name	Address	Date	Amount
Step 2 Donations made	Referendum entity		1 Address Street MON REPOS QLD 4670	05/06/2023	16100
Step 3					
Notes					
Step 4					
Step 4 Review					
Step 4 Review Step 5					



Import donations

The import function allows you to upload a spreadsheet of transactions into eReturns, eliminating the need to manually enter each transaction. To import donations, you will need a spreadsheet of donations (either in MSExcel, CSV or XML format) that contains the required information for each donation. To start importing donations click the 'Import' button.

This will launch the import screen. From here you can choose the file you wish to upload.



Once you have selected the file, click 'Upload'.

When eReturns has uploaded your spreadsheet, it will ask you to match the columns in your spreadsheet to the columns in eReturns.

	<u>Main menu</u>	Testname [AdminReferendumdonor2] Logout					<u>out</u>	
Assign	data columns							
Select t	he columns you want to use.	Name 🗸	Address Line 1 💙		~		~	、
Skip		Referendum Entity 1	101 Smith Street	Manly	(NSW	2905	
Skip		Referendum Entity 1	101 Smith Street	Manly	Address Line 1	NSW	2905	
Skip		Referendum Entity 2	48 Cross Cres	Melbou	Address Line 2	VIC	3000	
Skip		Referendum Entity 2	48 Cross Cres	Melbou	State	VIC	3000	
					Transaction Date			
					Amount Annotation			

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

Import results						
The import is now complete.						
4 of 6 record(s) uploaded succesfully.						
The list below shows any transactions that could not be uploaded. You can export this list for review, and use the add functionality to manually add the transaction.						
Errors	Name	PostalAddress_AddressLine1	PostalAddress_AddressLine			
Could not convert 'Date' to a Date Could not convert 'Amount' to a number Postcode must be 4 digits State is required. The amount must be whole dollar amount greater than zero. Do not include any cents symbols or separators.	Name	Address Line 1	Address Line 2			
The transaction made on 28/02/2010 does not fall within the relevant reporting period 1/07/2010-30/06/2011.	Company E	Testland'	453 Test Track			
← Export →		·	·			

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 spreadsheet 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 recorded all donations, click 'Close'. Then click 'Next' to move to the Notes screen.

Donations you have made	to Referendum Entities		8
Donations you have made			0
Name	Address	Date	Amount
Referendum Entity 2	48 Cross Cres Melbourne VIC 3000	02/02/2020	3000
Referendum Entity 2	48 Cross Cres Melbourne VIC 3000	02/02/2020	12000
Referendum Entity 1	101 Smith Street Manly NSW 2905	02/02/2020	1200
Referendum Entity 1	101 Smith Street Manly NSW 2905	02/02/2020	19000
•			-
¢	I ≤ <4 Page 1 of 1 ⇒> ⇒1 10 ♥	١	/iew 1 - 4 of 4
+ Add 🕜 Edit 🗍 Delete	→ Import ←		← Export →
			Marcha
		< Dack	Next >

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Step 4 – Notes

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

Referendum Organisa	tion Donor Return	(2023 Referendum)		
These screens will let you c and available to you to cont	omplete or amend a di inue and lodge the ne>	closure return. You can logout of eReturns at an time you log in.	ly time and the information you've alread	y entered will be saved
Step 1 Organisation Details	Annotations You can record add	tional or supporting information here that will app	pear as footnotes on your return.	0
	Annotations			0
Step 2		Note	e	
Donations made				
Stop 3				
Step 5 Notes				
Step 4				
Review				
Step 5				
Sign and Lodge	4		1	No reports to view
	Ģ	In the Page 1 of 1	1 10 🗸	No records to view
	+ Add 🥖	Edit 🗍 Delete		
			< Back	Next >

NOTE: 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.

Add an Annotation			×
Annotation			
	*		
	Ŧ		
		Close	Add

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

From this screen, you may view the draft return.

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



NOTE: During this review, there will be no content in the signature or date fields on the front of the return. These fields will *only* be populated when you lodge the return and will appear on the final version of the return.

If you need to change 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 details, go to the <u>Lodging a Notice</u> <u>of Incomplete Return</u> section of this guide.



Step 6 – Sign and lodge

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

Referendum Organisa	ation Donor Return (2023 Referendum)
These screens will let you and available to you to con	complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved tinue and lodge the next time you log in.
Step 1 Organisation Details	Lodge (7) Certification
Stop 2	Only the financial controller or another person capable of acting on behalf of your organisation can make this declaration.
Donations made	Evertify that the information contained in this return and its attachments is true and complete to the best of my knowledge, information and belief. I have made due and reasonable inquiries of the organisation on whose behalf I am authorised to complete this form. Lunderstand that cubmitting a false or mislanding return is an offence under Division 137.1 of the Criminal complete this form.
Step 3 Notes	Code Act 1995.
Step 4	Type your name in the signature field below to confirm that you are the financial controller.
	Your Signature
Step 5 Sign and Lodge	Lodgement Date 22/09/2023
	Type your password in the field below to lodge the disclosure return.
	*
	< Back Lodge

NOTE: You will need to select the certification box.

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.

Main menu	Testname [AdminReferendumdonor2] Logout
Referendum Organisa	ation Donor Return (2023 Referendum)
These screens will let you and available to you to con	complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved tinue and lodge the next time you log in.
Step 1 Organisation Details Step 2 Donations made	Lodgement Confirmation This disclosure return was successfully lodged with the AEC and your reference number for this transaction is BHFHY8. Please retain this code for future reference. A copy of your lodged return has automatically been sent to your email address. If you have not received the email within 24 hours please contact the AEC.
Step 3 Notes Step 4 Review	To save a printable copy of the lodged return to your computer please click this link <u>Save copy of lodged return</u> . Back to main menu.
Step 5 Sign and Lodge	

From this screen you may save a PDF copy of the return. The AEC recommends that you save a copy of the return. eReturns will email you a copy of your lodged return automatically. The unique reference number presented on this screen is recorded on the bottom right-hand corner of the lodged return.

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. Referendum disclosure was introduced in 2023, so no earlier returns will be available. The example screen below is for an individual donor.

New Disclosure Return	
What type of disclosure return would you like to lodge?	Continue

Click 'Continue' to launch the return wizard. 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 screen.

Progress through the wizard is tracked down the left-hand side of the screen.



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 review and update your details.

NOTE: These details have been automatically pre-filled from your account.

Referendum Individua	al Donor Return (2023 Referendum)
These screens will let you on and available to you to com	complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved tinue and lodge the next time you log in.
Step 1 Your Details	Referendum Individual Donor details Salutation
Step 2 Donations made	First name* Test Surname*
Notes Step 4 Review	Donor Postal Address International address Address Test Street *
Step 5 Sign and Lodge	Suburb* WELLINGTON
	State ⁻
	Postcode* 5259
	Email*
	Test.email@email.com
	Confirm Email
	Phone* 12344321
	Fax
	Mobile
	< Back Next >

Once you have reviewed your details click 'Next' to move to the Donations Made screen.



Step 2 – Donations made to Referendum Entities

This screen will allow you to record details of donations you have made to referendum entities during the referendum expenditure period. Donations made to other entities should not be recorded here.

Step 1	Donations	you have made to Re	ferendum Entities		8
Your Details	Donations you	have made			0
		Name	Address	Date	Amount
54 A					
Review					
Step 5					
Step 4 Review Step 5 Sign and Lodge	φ.		<pre><< Page 1 of 1 >> >= 10 V</pre>	No rec	cords to view

To record donations, click the '+ Add' button. This will launch the 'Add a donation' window.

Name*			
ABN			
ACN			
☐ International address Address			×
Suburb*			
State*			
► Postcode*	•		
Transaction date*			
Amount*			
so			
Ø			
		_	
	Clos	e	Add

In the 'Add a donation' window you can fill in the details of each donation. For each donation you must include the amount, transaction date and name of the referendum entity 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' 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 Notes screen. **NOTE**: You can also import data from a spreadsheet. For step-by-step instructions on the import function, refer to the 'Import donations' section of this guide (above).

Import donations

The import function allows you to upload a spreadsheet of transactions into eReturns, eliminating the need to manually enter each transaction. To import donations, you will need a spreadsheet of donations (either in MSExcel, CSV or XML format) that contains the required information for each donation. To start importing donations click the 'Import' button.

This will launch the import screen. From here you can choose the file you wish to upload.

Upload a list of transactions	×
File to upload Choose file No file chose	n
Close	Upload

Once you have selected the file, click 'Upload'.

When eReturns has uploaded your spreadsheet, it will ask you to match the columns in your spreadsheet to the columns in eReturns.

Main menu			Test	name Surname [Adn	ninReferendumdonor2] Logout			
Assigr	ı data columns							
Select	the columns you want to use.							
	~	Name 👻	Address Line 1 💙		~		~	~
Skip		Referendum Entity 1	101 Smith Street	Manly	(NSW	2905	
Skip		Referendum Entity 1	101 Smith Street	Manly	Address Line 1	NSW	2905	
<u>Skip</u>		Referendum Entity 2	48 Cross Cres	Melbou	Address Line 2 Suburb	VIC	3000	
Skip		Referendum Entity 2	48 Cross Cres	Melbou	State	VIC	3000	
					Transaction Date Amount Annotation			

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

nd use the a	add functionality to manually	add the transaction.
Name	PostalAddress_AddressLine1	PostalAddress_AddressLine
Name	Address Line 1	Address Line 2
Company E	Testland'	453 Test Track
	Name Name Company E	Name Postal-Address_AddressLine1 Name Address Line 1 Company E Testland

Electoral Commission

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 spreadsheet 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 recorded all donations, click 'Close'. Then click 'Next' to move to the Notes screen.

Donations	you have made to	Referendum Entities		0
Donations you h	ave made			0
	Name	Address	Date	Amount
Referendur	n Entity 2	48 Cross Cres Melbourne VIC 3000	02/02/2020	3000
Referendur	n Entity 2	48 Cross Cres Melbourne VIC 3000	02/02/2020	12000
Referendur	n Entity 1	101 Smith Street Manly NSW 2905	02/02/2020	1200
Referendur	m Entity 1	101 Smith Street Manly NSW 2905	02/02/2020	19000
				_
φ		I ≪ Page 1 of 1 ▷> ▷I 10 ♥	١	/iew 1 - 4 of 4
+ Add	🖋 Edit 📄 Delete 🗧	→ Import ←		← Export →
			< Back	Next >

an Electoral Commission



Step 3 – Notes

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

Referendum Individua	l Donor Return (2023 Refe	rendum)	
These screens will let you o and available to you to cont	complete or amend a disclosure re inue and lodge the next time you	eturn. You can logout of eReturns at any time and the information you' log in.	ve already entered will be saved
Step 1 <u>Your Details</u>	Annotations You can record additional or s	upporting information here that will appear as footnotes on your retur	n.
Step 2		Note	3
Donations made			
Notes			
Step 4 Review			
Step 5			
	← Add	rid id Page 1 of 1 ⇒ ⇒i 10 ♥	No records to view
			Back Next >

NOTE: 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.

Annotation			
	· · · · · · · · · · · · · · · · · · ·	n.	
		~	

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 4 – Review

The next screen is the review screen.

Referendum Individual Donor Return (2023 Referendum)	
These screens will let you complete or amend a disclosure return. You can logout of eReturns at any time and the information you'v and available to you to continue and lodge the next time you log in.	ve already entered will be saved
Step 1 Review	0
Your Details	Q 🖪 ··· 💧
Step 2 Donations made	
Step 3 Notes AEC Australian Electoral Commission Referendum Donor Disclosure Individuals	Return –
Step 4 For 2023 Referendum held on 14 October :	2023
Step 5 Step 5 The due date for lodging this return is Monday 29 January 2024.	donors to furnish a
Sign and Lodge Completing the Return:	
 This return is to be completed by a person who made one or more donations totalling more to referendum entity during the referendum expenditure period. 	han the \$15,200 to a
This return is to be completed with reference to the Financial Disclosure Guide for Reference	um Donors.
 Amounts should be reported on a GST inclusive basis. 	
 Under subsection 320(1) of the Commonwealth Electoral Act 1918 (Electoral Act) this return public inspection at <u>www.aec.gov.au</u> from Monday 1 April 2024. 	will be available for
 Any supporting documentation included with this return may be treated as part of a public dis displayed on the AEC website. 	closure and
The information on this return is collected under section 109G of the Referendum Act.	
NOTE: This form is for the use of individuals only. Please use the form Referendum Donor Disclosu Organisations if you are completing a return for an organisation.	ure Return –
Details of person that made the donation	
Name Test Donor	•
□ I need to lodge a Notice of Incomplete Return (Section 109V Notice)	
< B	ack Next >

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.

NOTE: during this review, there will be no content in the signature or date fields on the front of the return. These fields will *only* be populated when you lodge the return and will appear on the final version of the return.

If you need to change 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 details, go to the <u>Lodging a Notice</u> <u>of Incomplete Return</u> section of this guide.



Step 5 – Sign and lodge

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

Referendum Individual Donor Return (2023 Referendum)				
These screens will let you co and available to you to conti	omplete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be save inue and lodge the next time you log in.	ed		
Step 1 Your Details	Lodge Certification			
Stop 2	Only the financial controller or another person capable of acting on behalf of your organisation can make this declaration.			
Step 2 Donations made	I certify that the information contained in this return and its attachments is true and complete to the best of my knowledge, information and belief. I have made due and reasonable inquiries of the organisation on whose behalf I am authorised to complete this form. I understand that submitting a false or misleading return is an offence under Division 137.1 of the Criminal Code Act 1905.			
Notes	COUR ALL 1993.			
Step 4	Type your name in the signature field below to confirm that you are the financial controller.			
	Your Signature			
Step 5	I odgement Date			
Sign and Lodge	27/09/2023			
	Type your password in the field below to lodge the disclosure return.			
	*			
	< Back Lodge			

NOTE: You will need to select the certification box.

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 the return. The AEC recommends that you save a copy of the return. eReturns will email you a copy of your lodged return automatically. The unique reference number presented on this screen is recorded on the bottom right-hand corner of the lodged return.



Lodging a Notice of Incomplete Return

eReturns allows you to lodge a Notice of Incomplete Return. For more information about when it is appropriate to lodge a Notice of Incomplete Return, please consult the <u>Disclosure Guide for</u> <u>Referendum Donors</u>.

To lodge a Notice of Incomplete Return, select the checkbox at the bottom of the review screen.

Referendum Individual Donor Return (2023 Referendum)
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 Review
<u>Your Details</u> := ∀ ∨ ···· - + ↔ 1 of 2 ⊙ £ Q B ··· •
Step 2 Donations made
Step 3 Notes AEC Referendum Donor Disclosure Return – Individuals
Step 4 For 2023 Referendum held on 14 October 2023
Step 5 Sign and Lodge Section 109G of the Referendum (Machinery Provisions) Act 1984 (Referendum Act) requires donors to furnish a return within 15 weeks after the end of the referendum expenditure period. The due date for lodging this return is Monday 29 January 2024. Completing the Return: • This return is to be completed by a person who made one or more donations totalling more than the \$15,200 to a referendum entity during the referendum expenditure period. • This return is to be completed with reference to the <i>Financial Disclosure Guide for Referendum Donors</i> . • Amounts should be reported on a GST inclusive basis. • Under subsection 320(1) of the Commonwealth Electoral Act 1918 (Electoral Act) this return will be available for public inspection at www.aec.gov.au from Monday 1 April 2024. • Any supporting documentation included with this return may be treated as part of a public disclosure and displayed on the AEC website. • The information on this return is collected under section 109G of the Referendum Act. NOTE: This form is for the use of individuals only. Please use the form Beferendum Donor Disclosure Return and the section 200 of the Referendum Act.
Organisations if you are completing a return for an organisation.
Name Test Donor
I need to lodge a Notice of Incomplete Return (Section 109V Notice)
<back next=""></back>

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



Referendum Individua	I Donor Return (2023 Referendum)
These screens will let you c and available to you to cont	complete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved inue and lodge the next time you log in.
Step 1 Your Details Step 2 Denations made Step 3 Notes	Incomplete Return © Part 1: Incomplete Particulars Please provide details of the information you believe is missing from the disclosure return.
Step 4 Review Step 5 Sign and Lodge	Part 2a: Reason for incomplete particulars Provide the reason's you were unable to obtain the particulars listed in Part 1 above. For example, that you were unable to obtain records from particular branches or persons.
	Part 2b: Attempts made to obtain this information Detail all attempts made to obtain the information detailed in Part 1.
	Part 3: Person/s who may be able to provide the missing particulars List the name and address of any person/s who you believe can provide the missing particulars and the reason that you believe they have those particulars.
	< Back Next >

In this screen you are required to provide details of the information that is missing from the return, the reason why you were unable to obtain the information, who you believe may have the information, and why you believe that person has the information. Once you have completed all the fields on the screen, click 'Next' to review the Notice of Incomplete Return.

Referendum Individual [Donor Return (2023 Referendum)			
These screens will let you con and available to you to continu	plete or amend a disclosure return. You can logout of eReturns at any time and the information you've already entered will be saved ie and lodge the next time you log in.			
Step 1	Incomplete Particulars Review 🕜			
Your Details	≔ ∀ ✓ ···· – + ਦ 1 of2 즷 ① 오 囧 ··· ♠			
Step 2 Donations made				
Step 3 Notes Step 4	Notice of Incomplete Return			
<u>Review</u>	Completing the Notice of Incomplete Return required by section 109V of the Referendum (Machinery			
Step 5 Sign and Lodge Sign and Lodge - You must use this form when you are unable to fully complete a referendum entity or referendum donor disclosure return because there is information that you do not have and cannot obtain. You must find complete the relevant disclosure return as fully as possible. - You must find complete the relevant disclosure return. You must find be completed by the person who is required to complete disclosure return. - This form is to be completed by the person who is required to complete disclosure return.				
	Type of return Referendum Donor to Political Party Disclosure Return Individual			
	Period covered This return relates to the 2023 Referendum			
	Name of person/organisation (or whose behalf the incomplete return is being todged)			
	Postal address Test Street			
	Suburbhown WELLINGTON State SA Postcode 5259			
	Telephone number			
	Email address			
	< Back Next >			

Once you have reviewed the Notice of Incomplete Return click 'Next' to go to the Sign and Lodge screen. To lodge the return and Notice of Incomplete Return follow the instructions at <u>Step 5 – Sign and lodge</u>.



Amending a return

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

Main menu		
Welcome to eReturn	s! Please select from the menu below.	
-	New Return Start entering details for a new disclosure return.	0
>>	Continue Return Continue an existing disclosure return which has not yet been lodged.	Ø
	View Returns Show a list of disclosure returns previously lodged and any currently in progress.	Ø
	Manage Details Maintain all details of your account including your user name and password.	0

The View Returns screen will display. The bottom half displays Returns that can be amended. Use the drop-down menu to select 'Amend'.

	Re	turn			locion	
Referendum Organisat	ion Donor Return for	2023 Reference	lum	Select	~	
				View Retur	n	
				Amend		

In the 'Action' column, select 'Amend' in the drop-down list next to the return you wish to amend.

This will launch the amendment wizard. The amendment wizard is the same as the return wizard, except it contains the data from the original return. To amend a return, 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. This amendment form can be lodged in the same way as the original return.



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.

lear name*	
user name	
Password*	
	Login

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

Reset a forgotten password
Please enter your user name and a new password will be emailed to you. If you are an Associated Entity or Political Party your password cannot be reset automatically and you must contact Funding and Disclosure on (02) 6271 4552 or at fad@aec.gov.au
User name*
Picture characters
Type the characters you see in the picture above*
Reset password

Alternatively, you can contact the Disclosure team on 02 6271 4552 or email fad@aec.gov.au.

Forgotten username

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.

User name*	
Password*	
	Login

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.



Please enter the email address you have provided to us and your user name will be emailed to you. Email address* Picture characters VACINEEG Type the characters you see in the picture above*	Send a forgotten user name	
Email address* Picture characters VACINKEG Type the characters you see in the picture above*	Please enter the email address you have provided to us and your user name will be emailed to you.	
Picture characters VACINKEG Type the characters you see in the picture above*	Email address*	
	Picture characters VACINKEG Type the characters you see in the picture above*	

Alternatively, you can contact the Disclosure team on 02 6271 4552 or email fad@aec.gov.au.

Other problems

If you experience any difficulties while using eReturns, contact the Disclosure team on 02 6271 4552 or email <u>fad@aec.gov.au</u>.