

Electronic Disclosure System (EDS) for Candidates & Agents

FOR STATE GOVERNMENT ELECTIONS AND BY-ELECTIONS

USER GUIDE



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1. Introduction

1.1 Overview of the Act and Regulation

This user guide is intended for state government candidates (or their agents) who are required to comply with the financial disclosure provisions of the *Electoral Act 1992* (the Act) and the Electoral Regulation 2024 (the Regulation).

1.2 Disclaimer

Publications by the Electoral Commission of Queensland (ECQ) are not intended as a substitute for the Act or Regulation. Candidates and agents are advised to obtain a copy of the Act and Regulation, and if necessary, seek independent legal advice. The Act and Regulation are available online at www.legislation.qld.gov.au.

1.3 Contacting the ECQ

Please contact the ECQ's Funding and Disclosure Unit for general enquiries and assistance. Our details are set out below:

Postal address: GPO Box 1393

BRISBANE QLD 4001

Office location: Level 20, 1 Eagle Street, Brisbane, Queensland

Telephone: 1300 881 665

Email: fad@ecq.qld.gov.au
Website: www.ecq.qld.gov.au

2. Glossary

Please see below for key terms used throughout this user guide and their definitions.

Disclosure Period

If a candidate contested the last state general election, the disclosure period for the candidate commences 30 days after election day for the last general election and ends 30 days after election day for the current election.

Note: if the candidate contested a by-election held since the last state general election, then their disclosure period will commence 30 days after election day for the by-election in which they were a candidate.

If the candidate has not contested an election in the past 4 years, then the disclosure period will commence from the earliest of the following days:

- the day they announce or otherwise publicly indicate their intention to be a candidate
- the day they nominate as a candidate in the election
- the day they indicate their intention to be a candidate in the election, for example, by accepting a donation towards their campaign.

Electoral Expenditure

Electoral expenditure includes any of the following costs relating to a campaign purpose:

- costs of designing, producing, printing, broadcasting or publishing any kind of material for an election including (but not limited to):
 - advertisements broadcast at a cinema, on radio or television or on the internet
 - direct marketing through the post office or email
 - o flyers, billboards, brochures, signs or how-to-vote cards
- distribution costs for election material such as the cost of postage, couriers or sending SMS messages
- costs of opinion polling or research

 fees for contracted services related to an activity mentioned above (e.g., payments for experts or consultants, the provision of data, etc).

Please refer to state government <u>Fact sheet 7 – Definition of electoral expenditure</u> (found at <u>ecq.qld.gov.au/factsheets</u>) for more details.

Gift

A gift is defined as the disposition of property, or provision of a service, by a person to another person for no payment of inadequate payment.

Gifts include:

- electoral expenditure gifted to a participant in an election
- uncharged interest or an amount forgiven on a loan
- the part of a fundraising contribution that exceeds \$200
- an amount given to a third party or another donor to enable them to make a gift in support of a candidate or a registered political party.

Gifts do not include:

- property provided under a will
- fundraising contributions of \$200 or less, or the first \$200 of a fundraising contribution that exceeds \$200.
- an amount transferred from an individual's own funds (e.g., from a personal bank account) to the individual's own state campaign bank account
- an amount contributed from an account an individual holds jointly with their spouse to the individual's own state campaign bank account
- volunteer labour or incidental use of a volunteer's vehicle or equipment.

Refer to state <u>Fact sheet 5 - Definition of gifts, loans and political donations</u> (found at <u>ecq.gld.gov.au/factsheets</u>) for more information about gifts.

Gifted Electoral Expenditure

You are taken to have incurred **gifted electoral expenditure** if:

 a person other than a candidate, registered political party or registered third party incurred electoral expenditure and:

- o the expenditure benefited you; and
- you authorised or consented to the expenditure or accepted any material that resulted from the expenditure; and
- you did not receive an invoice or pay for the expenditure within 7 days
 of any of the above; or
- a candidate, registered political party or registered third party incurred electoral expenditure and:
 - o the expenditure benefited you; and
 - you authorised or consented to the expenditure or accepted any material that resulted from the expenditure; and
 - you received an invoice for payment of the expenditure.

Refer to state <u>Fact sheet 34 – Gifted electoral expenditure</u> (found at <u>ecq.qld.gov.au/factsheets</u>) for more information about gifted electoral expenditure.

Loan

A loan is when a person or entity lends money to a candidate by:

- advancing money
- providing credit or another form of financial accommodation
- paying on behalf of the candidate with an obligation for them to repay the amount
- making any other transaction that is in effect a loan of money.

Note:

- Money received from financial institutions or by use of a credit card are not considered a loan.
- A loan is considered a gift when it is made for no consideration or inadequate consideration.

Refer to state <u>Fact sheet 5 – Definition of gifts, loans and political donations</u> (found at <u>ecq.qld.gov.au/factsheets</u>) for more information about loans.

Political donation

A political donation is any gift or non-commercial loan given to a registered political party or candidate that is accompanied by a donor statement.

A donor statement is a written document which must:

- be completed by the donor of the gift or loan
- name the election participant given the gift or loan
- state the gift or loan is intended to be used for an electoral purpose
- detail the relevant particulars of the donor of the gift or loan
- be given to the recipient with the gift or loan within 14 days after the gift or loan is made.

Refer to state <u>Fact sheet 5 – Definition of gifts, loans and political donations</u> and <u>Fact sheet 6 – Political donation caps</u> (both found at <u>ecq.qld.gov.au/factsheets</u>) for more details.

Further information about key terms and definitions can also be found in the <u>Electoral</u> Act 1992 and <u>Electoral Regulation 2024</u>.

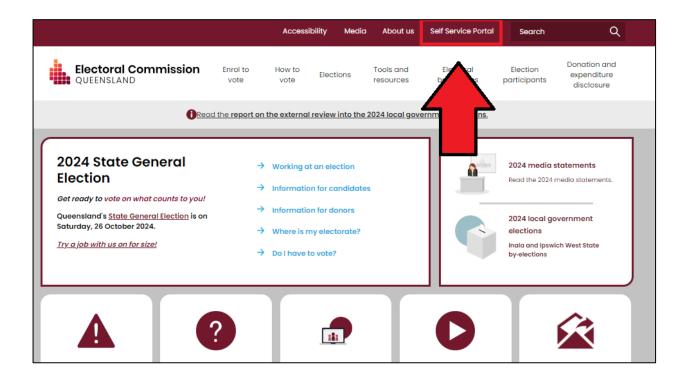
3. Accessing the Self Service Portal

A person who needs to announce their candidacy, register their state campaign account details or lodge returns in the Electronic Disclosure System (EDS) will first need to access and set up a profile in the ECQ's Self Service Portal (SSP).

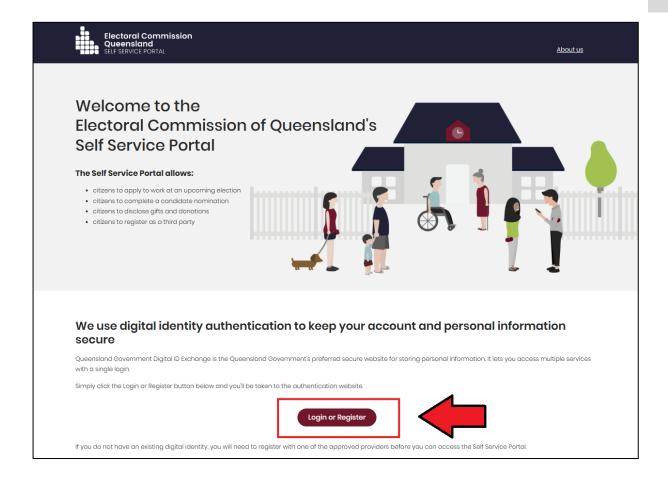
Please use the following instructions to register an account in SSP.

Note: If you already have an SSP account, you can skip to <u>section 4 of this user guide</u>.

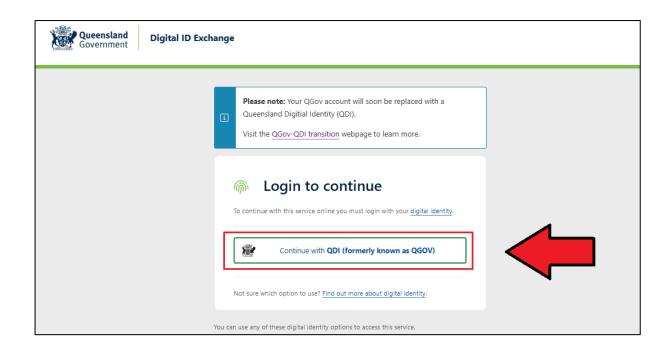
Visit the ECQ's website at <u>www.ecq.qld.gov.au</u> and select the **Self Service** Portal button at the top of the page.



 Alternatively, you can access the SSP directly at selfserv.elections.qld.gov.au. 2. Click the Login or Register button at the bottom of the screen.

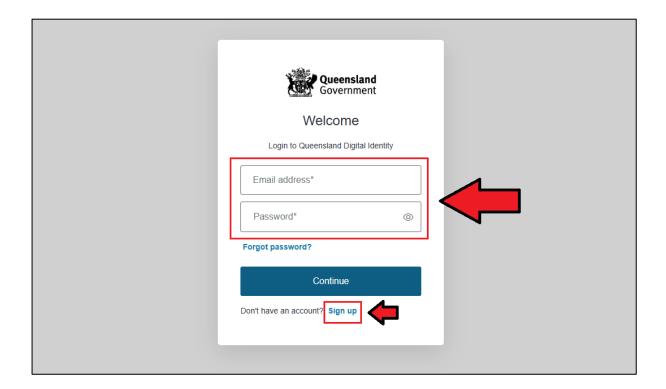


3. Click to Continue with QDI.

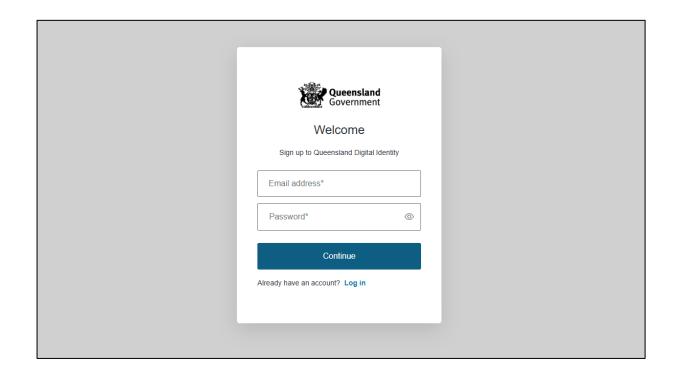


4. If you already have a Queensland Digital Identity (QDI) account, enter your email and password and click **Continue.** Then skip to step 12.

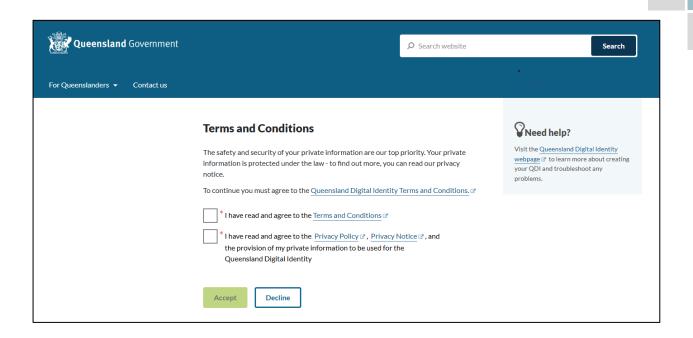
If you do not have a QDI account, click Sign up.



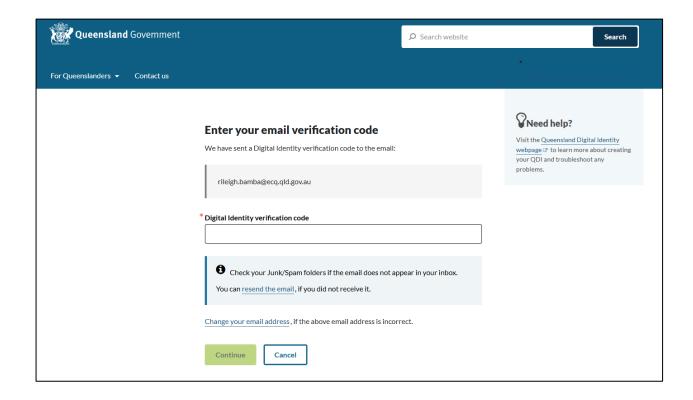
5. Enter an email address and password, then click **Continue**.



6. Select the tick boxes agreeing to the terms and conditions, then click Accept.



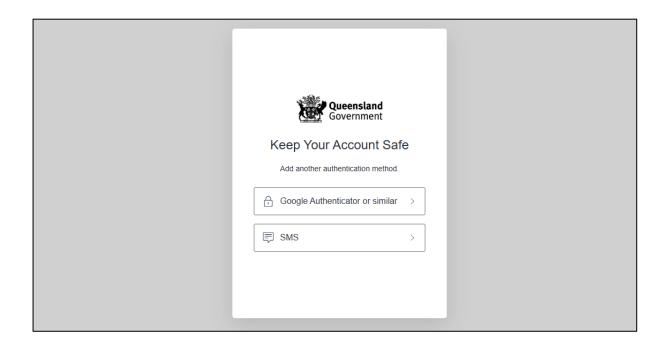
7. Retrieve your **verification code** from your email and enter it in the box provided. Then click **Continue.**



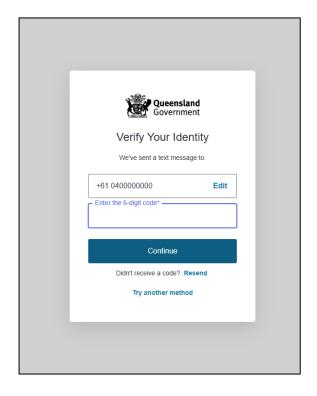
If you do not receive a confirmation code, please contact Shared Services
 Queensland on 13 74 68.

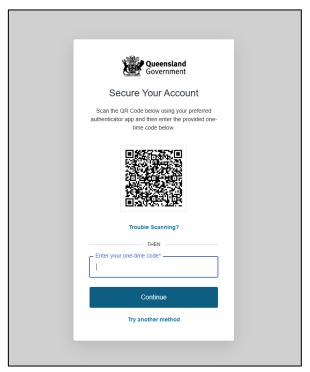
8. Choose an authentication method to secure your account.

You can either choose to receive a verification code by SMS or by using an authenticator application, such as Google Authenticator.



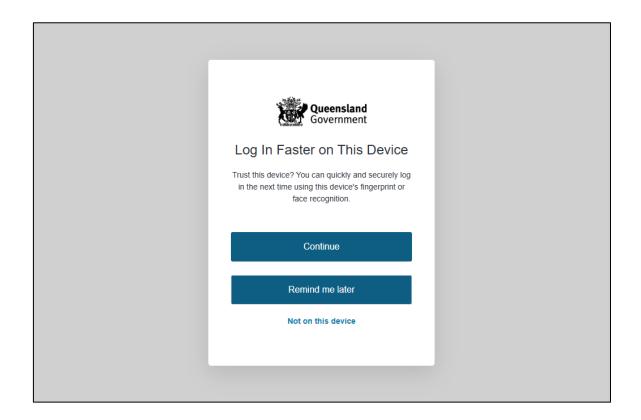
9. Retrieve your **one-time code** from your mobile device or authenticator app and enter it in the box provided. Then click **Continue.**





10. If you are using a trusted device, you can click **Continue** to register the device with QDI. This will allow you to quickly log in the next time using the sign-in options on your device rather than receiving a verification code.

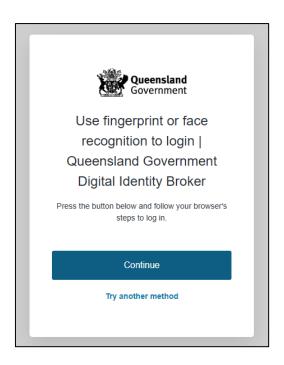
If you are not on a trusted device, click **Not on this device.**



11. After successfully setting up your account, click **Continue**.

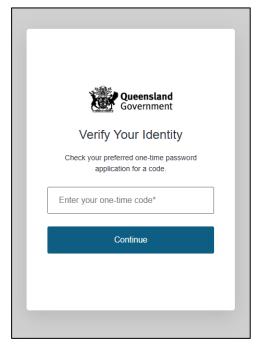


12. If your device is registered with QDI, you will be prompted to use facial or fingerprint recognition or another sign-in option on your trusted device to log in. Then click **Continue**.

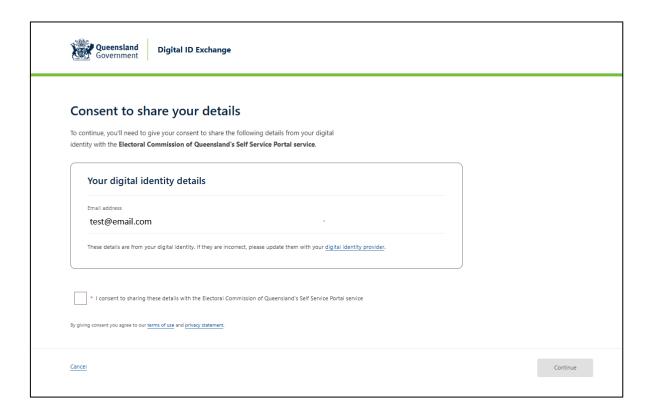


Otherwise, retrieve the 6-digit code from your mobile device or authenticator app to verify your identity. Enter the code in the box provided then click **Continue.**

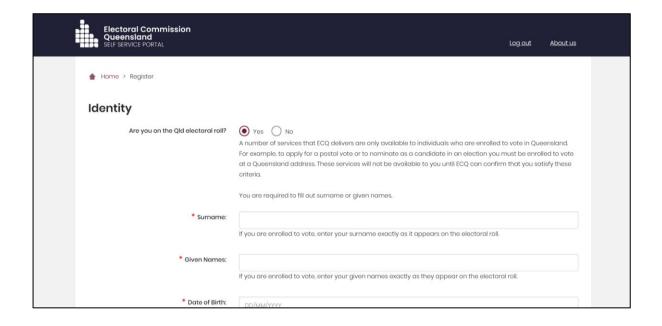




13. The first time you access SSP, you will be asked to consent to share your details with the ECQ. Tick the box and click **Continue.**



14. The first page to appear in SSP will be the **Identity** page. Enter your information into all mandatory fields then select **Search the Roll**.

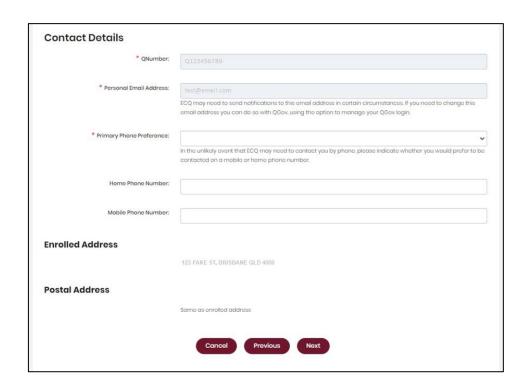


Did you get an error message? Here are some possibilities to check:

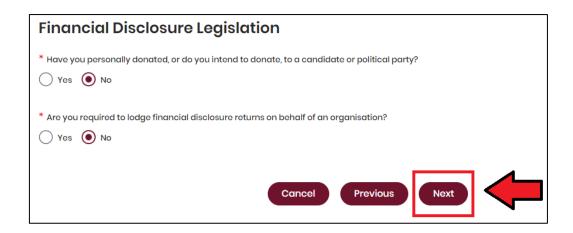
- Do not enter the street suffix in the Street Name field (no St, Ave, Ln, etc).
- If you receive the error message 'No entry was found on the Queensland electoral roll matching these details,' please double check that everything has been entered correctly.
- If you continue to receive that error, visit the Australian Electoral
 Commission's (AEC's) website at check.aec.gov.au to ensure your
 enrolment details are up to date. You can create your SSP profile using old
 details, and once the AEC has updated their roll, the ECQ will be
 automatically notified.
- If you are not on the Queensland electoral roll (maybe you are under 18 or enrolled in another state), please select No for the question Are you on the Qld electoral roll.

15. Enter your contact details and choose **Next**.

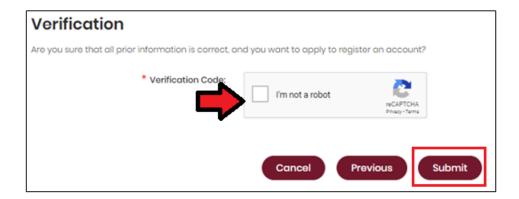
If your address has been verified against the electoral roll, your address will be prefilled and so not able to be edited. If you need to change these details, please visit the AEC at aec.gov.au.



16.On the **Financial Disclosure Legislation** page, complete the 2 questions relating to the types of returns that you may need to lodge in the EDS. Then click **Next**.

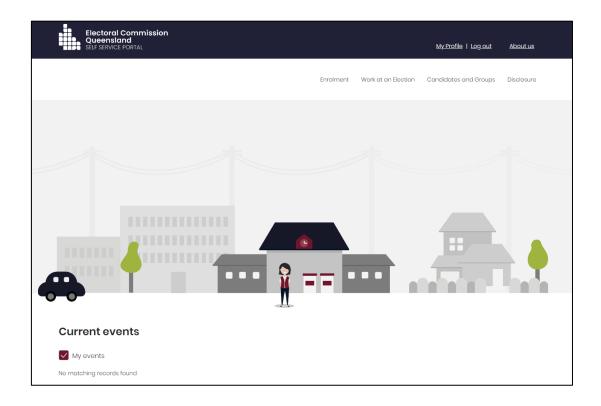


- If you are only required to lodge returns as a candidate or an agent for a candidate in an election, answer No to both questions.
- If you will also be lodging returns as an individual donor or third party, answer Yes to the first question.
- If you are required to lodge returns on behalf of an organisation that is a donor, third party, publisher, broadcaster or associated entity, answer Yes to the second question.
- For more information on how to register as a donor, third party, publisher, broadcaster or associated entity, refer to the relevant EDS user guide at www.ecq.qld.gov.au/factsheets.
- 17. If asked for verification, tick the box stating 'I'm not a robot.' Then click **Submit.**If you are a robot, please close the browser.



18. You will then be redirected to the **Self Service Portal**.

From there you can register as an announced candidate (see <u>section 4</u>) or access EDS (see <u>section 6</u>).



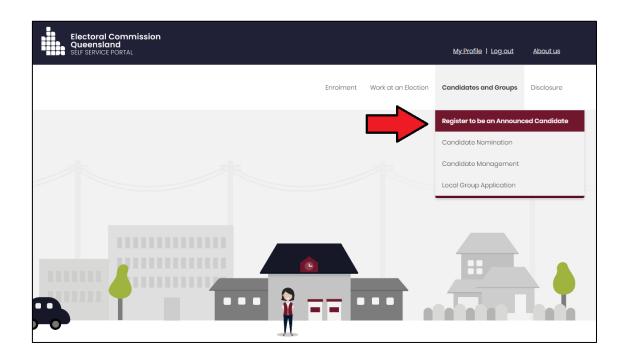
4. Register as an announced candidate

After setting up a user profile in the Self Service Portal, candidates who have announced or indicated their intention to nominate for a state government election need to register their announcement before accessing EDS.

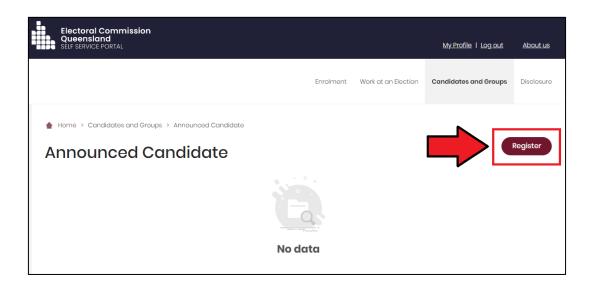
If you have already nominated for an election, you are not required to announce your candidacy.

To register as an announced candidate, please use the following instructions.

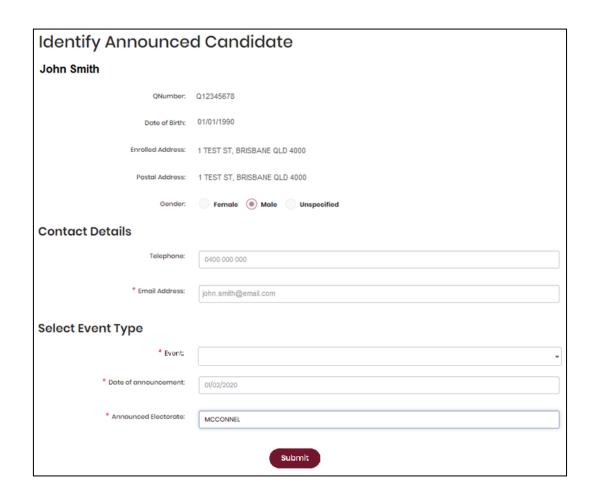
 When logged into the Self Service Portal (<u>selfserv.elections.qld.gov.au</u>), select the Candidates and Groups dropdown menu at the top right of the screen.
 Then choose Register to be an Announced Candidate.



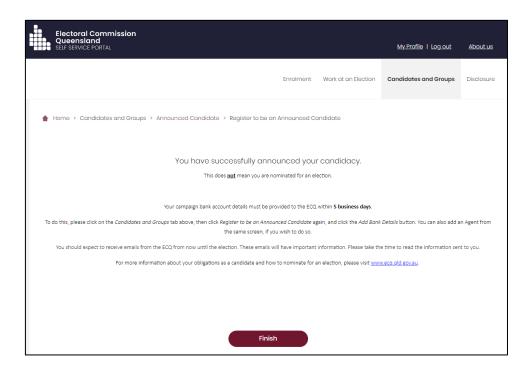
2. On the next page, choose **Register**.



3. Complete all relevant details that are not already prefilled from the electoral roll. Then choose **Submit** at the bottom of the page.



4. Congratulations on announcing your intention to be a candidate!



- You will need to provide your bank account details for your state campaign account within 5 business days after announcing your candidacy. See
 section 5 – Adding state campaign account details for instructions.
- You have the option to name an agent who, with you, will be responsible
 for meeting your obligations under the Act and the Regulation. If you do not
 name an agent, you will act as your own agent.
 - To formally appoint an agent with the ECQ, both the candidate and agent must complete form <u>FAD3B – Appointment of an agent –</u> <u>Candidate</u> (found at <u>ecq.qld.gov.au/factsheets)</u>.
 - Both the candidate and agent must sign the form before emailing it to fad@ecq.qld.gov.au.
 - The agent of a candidate will also need to create a Self Service Portal account following the instructions in <u>section 3</u>.
- You will receive an email with essential information about your candidacy and obligations within a few days of your announcement.

5. Adding state campaign account details

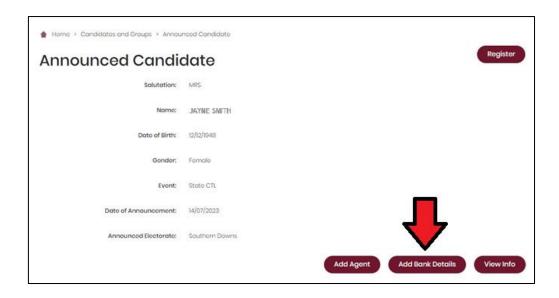
All candidates must register the details of their state campaign bank account with the ECQ within **5 business days** of announcing their candidacy.

To provide your bank account details to ECQ via the Self Service Portal (SSP), please use the following instructions.

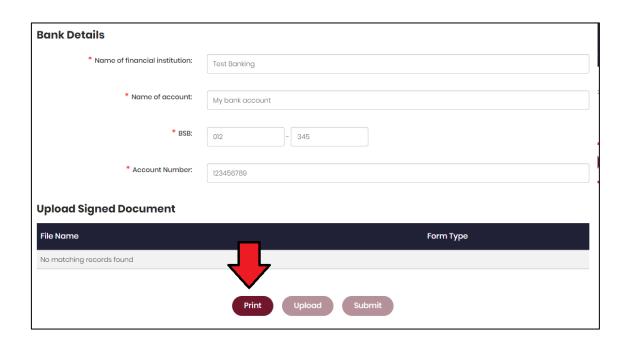
 When logged into SSP (<u>selfserv.elections.qld.gov.au</u>), choose the Candidates and Groups dropdown menu then select Register to be an Announced Candidate.



2. On the Announced Candidate page, select the **Add Bank Details** button.



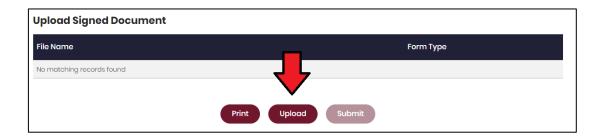
3. Enter your bank account information in the boxes provided then choose the **Print** button at the bottom of the page.



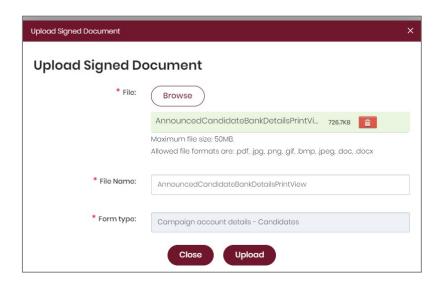
4. A tab or window called **Bank account details for candidates** will open. The form is automatically filled out with your candidate and bank account details. You will need to sign the form electronically or by printing it out and signing it. Be sure to save the form after signing.



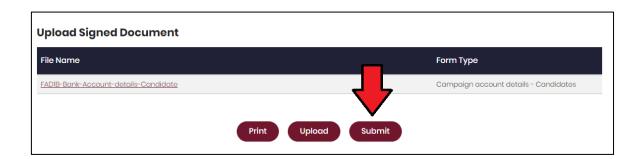
5. Once the form has been signed and saved, you can go back to the previous tab or window and choose the **Upload** button.



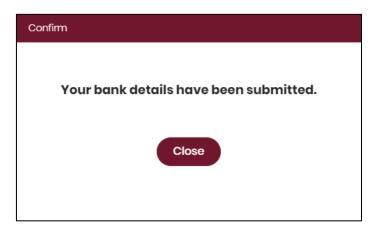
- If you have had to close the previous tab or window, repeat <u>steps 1 and 2</u>
 of this section to navigate back to the bank details page in SSP.
- 6. In the pop-up box, browse to the saved file on your device then click **Upload**.



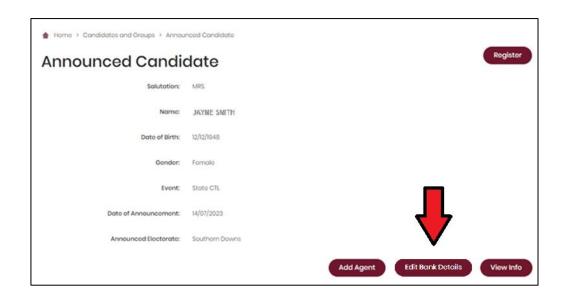
7. With the form uploaded and showing under the heading **Upload Signed Document**, you can choose the **Submit** button to add your bank details.



8. The bank details for your state campaign account have now been submitted.



- If your bank account details change, you will need to provide the new details within 5 business days.
- To update your bank details in SSP, choose the Candidates and Groups dropdown menu, select Register to be an Announced Candidate, then select Edit Bank Details.

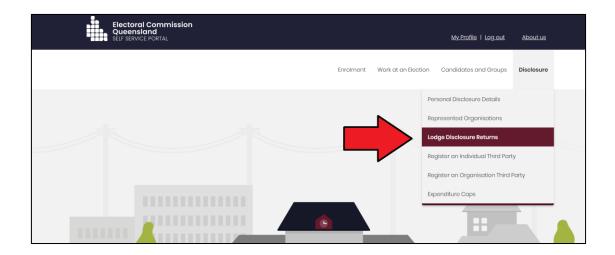


6. Logging into EDS

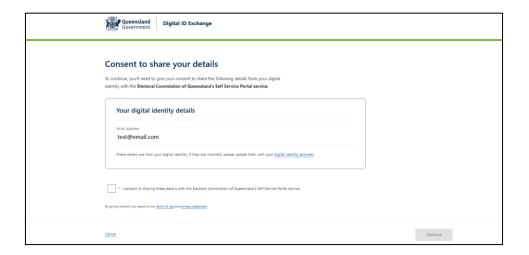
State government candidates or their agents will need to access the Electronic Disclosure System (EDS) to lodge disclosure returns.

Once you have registered in the Self Service Portal (SSP) (see <u>section 3</u>), you can log into EDS at any time by using the following instructions.

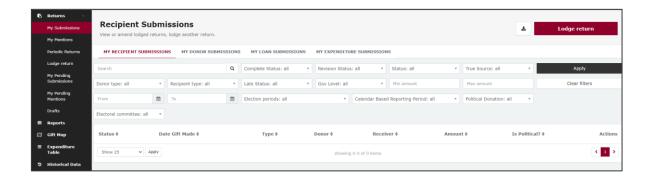
 When logged into SSP (<u>selfserv.elections.qld.gov.au</u>), choose the **Disclosure** dropdown menu in the upper right corner then select **Lodge Disclosure Returns**.



2. The first time you access EDS, you will be asked to consent to share your details with the ECQ. Tick the box and click **Continue**.



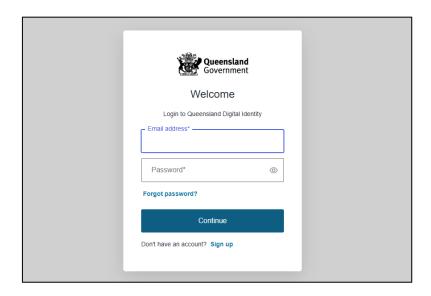
3. You will now see the main page of EDS.



 You can also access EDS directly at <u>disclosures.ecq.qld.gov.au</u>. Choose Login/Register in the top right-hand corner.



5. Log into EDS using your QDI email address and password.



6. If you haven't accessed EDS before, you will see the same consent screen pictured in step 2. Otherwise, the main page of EDS will appear.



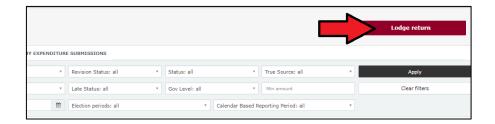
7. Disclosing a gift received in EDS

State government candidates who receive gifts of \$1,000 or more (cumulative from the same donor) are required to disclose the details of the gift in a return. If an agent is appointed, the agent is responsible for lodging the return.

Note: Refer to the <u>Glossary</u> for key terms and definitions.

To lodge a return for a gift received, please use the following instructions.

1. Click the maroon **Lodge return** button in the upper right corner of EDS.



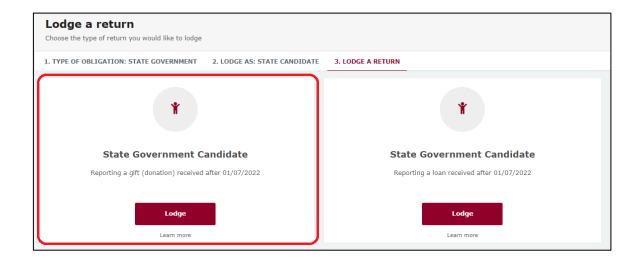
2. Under Type of Obligation, select **State Government**.



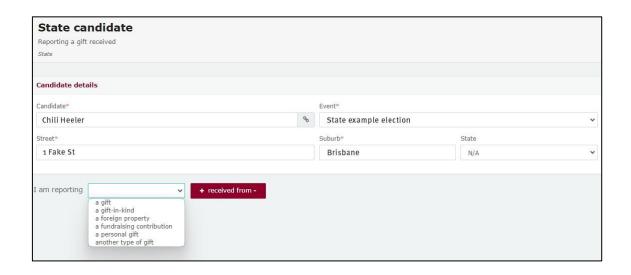
3. Select **State Candidate** on the Lodge As screen.



- An agent submitting a return on behalf of a state candidate will select
 Agent for State Candidate.
- 4. Choose the **Lodge** button under **Reporting a gift (donation) received after 01/07/2022**.



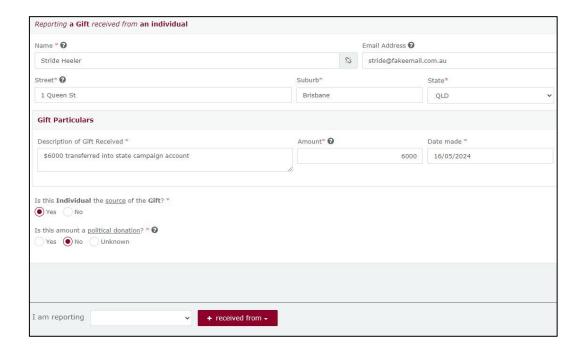
5. Your candidate details will be pre-filled. Select gift type using the **I am** reporting dropdown menu (e.g., a gift).



 If you are an agent lodging a return on behalf of a candidate, you may need to fill in the candidate's details. 6. Choose donor type from the **+ received from** dropdown menu (e.g., an Individual or a Corporation).



7. Enter all mandatory gift reporting information, such as name and address of the entity giving the gift, description of gift received, amount and date made.

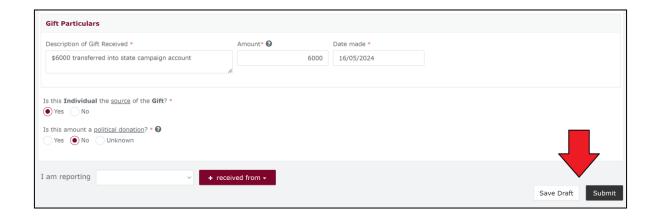


- You can hover over the question mark symbol (?) next to each field in EDS to see a description of what to enter.
- Depending on the person or entity who gave the gift, you may be required
 to enter additional information. State <u>Fact sheet 5 Definition of gifts,</u>
 <u>loans and political donations</u> (found at <u>ecq.qld.gov.au/factsheets</u>) has
 further information about what may be required.
- Additional gifts can be disclosed by selecting options from the I am
 reporting and + received from drop-down menus at the bottom of the
 page and repeating the steps above.

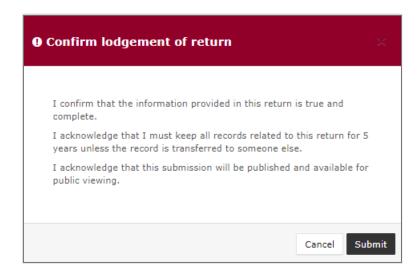
8. The question in bottom radio button **Is this amount a political donation?**must be answered.



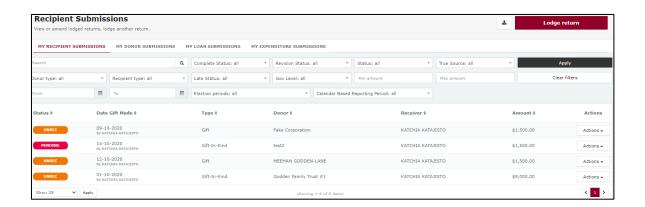
- Political donations are specific types of gifts or loans that are accompanied by a donor statement.
- Gifted electoral expenditure is also considered a political donation whether or not there is a donor statement.
- Political donations are the only type of gift that may be deposited into a state campaign bank account and used to incur electoral expenditure.
- If you are not sure if the gift is a political donation or not, state <u>Fact sheet 5</u>
 <u>Definition of gifts, loans and political donations</u> (found at <u>ecq.qld.gov.au/factsheets</u>) may help.
- If the gift is a political donation, you will need to identify if it was received by or for an electoral committee for an electoral district. An electoral committee is a committee that is established by a registered political party to help elect a candidate in a particular electoral district.
- 9. When finished, choose **Submit**.



 If you want to complete this return later, you can choose Save Draft at any time. Previously saved drafts can be found under Drafts in the side menu. 10. Select **Submit** again to confirm the information in the return is correct.



11. Your return will display on the Recipient Submissions page under the My Recipient Submissions tab. It will also display on the public Gift Map and Reports pages.



 If the value of the gift reported is \$1,000 or more (cumulative from the same donor), the **Status** of the gift will display as **UNREC** (unreconciled) until the donor lodges a corresponding return.

8. Disclosing a loan received in EDS

State government candidates who receive loans of \$1,000 or more are required to disclose the details of the loan in a return. If an agent is appointed, this return must be completed by the candidate's agent.

Note: Refer to the <u>Glossary</u> for key terms and definitions.

To lodge a return for loans received in EDS, please use the following instructions.

1. Click the maroon **Lodge return** button in the upper right corner of EDS.



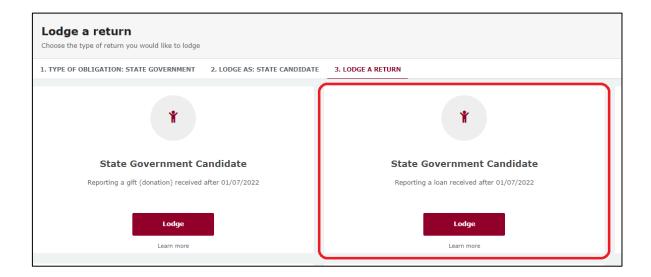
2. Under Type of Obligation, select **State Government**.



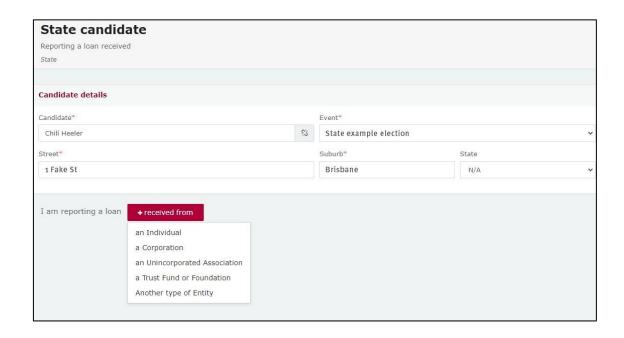
3. Select **State Candidate** on the Lodge As screen.



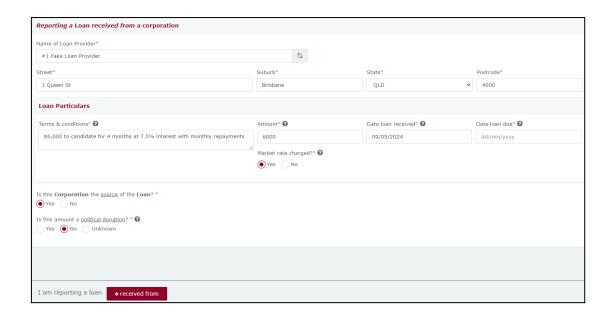
- An agent submitting a return on behalf of a state candidate will select
 Agent for State Candidate.
- 4. Choose the **Lodge** button under **Reporting a loan received after 01/07/2022**.



5. Select the type of entity that provided the loan from the **+ received from** dropdown menu.



6. Enter all required loan reporting information, such as name and address of the entity giving the loan, terms and conditions of loan, amount and date loan received, date loan due and date paid back (if applicable).



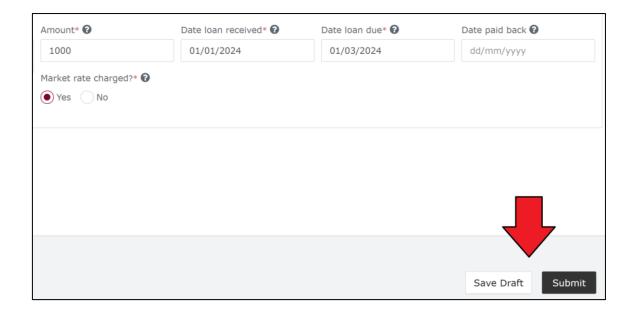
- Additional loans can be disclosed by using the + received from dropdown menu at the bottom of the page.
- 7. The question in the bottom radio button **Is this amount a political donation?** must be answered.



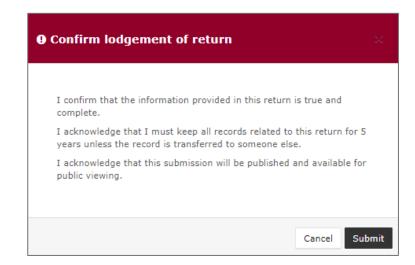
- Political donations are specific types of gifts or loans that are accompanied by a donor statement.
- Political donations must be deposited into the candidate's state campaign bank account, where they can be used to incur electoral expenditure.
- If you are not sure if the loan is a political donation or not, state <u>Fact sheet</u>
 <u>5 Definition of gifts, loans and political donations</u> (found at <u>ecq.qld.gov.au/factsheets</u>) may help.

- If the loan is a political donation, you will need to identify if it was received by or for an electoral committee for an electoral district. An electoral committee is a committee that is established by a registered political party to help elect a candidate in a particular electoral district.
- 8. When finished, choose Submit.

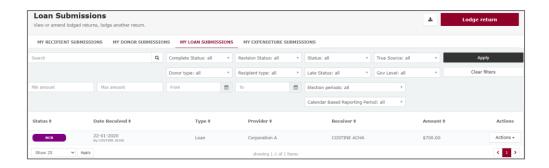
If you want to complete this return later, you can choose **Save Draft** at any time. Previously saved drafts can be found under **Drafts** in the side menu.



9. Select **Submit** again to confirm the information in the return is correct.



10. The loan received will display on the Recipient Submissions page under the My Loan Submissions tab. The return will also display on the public Reports page.



• The return **Status** will display as **NCR** (no corresponding return) to signify that a corresponding return from the loan provider is not required.

9. Submitting an election summary return

All candidates (or their agents) for a state government election are required to lodge an election summary return (ESR) within 15 weeks of election day.

In this return, you must disclose the:

- total value of all gifts and loans received for the election
- total number of entities that made those gifts and loans
- total amount of electoral expenditure or gifted electoral expenditure incurred.

If you received any gifts or loans totalling \$1,000 or more during your disclosure period, you must lodge a separate return in EDS for each of these gifts or loans prior to submitting your ESR. See section 7 - Disclosing a gift received in EDS or section 8 - Disclosing a loan received in EDS for instructions on how to lodge these returns.

All electoral expenditure or gifted electoral expenditure incurred for the election must be disclosed in the ESR. These amounts can be disclosed individually (see <u>section 9.1</u>) or by using a bulk upload spreadsheet (see <u>section 9.2</u>). The bulk upload spreadsheet is recommended when there is a large number of items to disclose.

If <u>no amounts</u> of electoral expenditure or gifted electoral expenditure need to be disclosed for the election, please refer to section 9.1 (steps 1 to 6).

Once all electoral expenditure (if any) has been entered into the ESR, the return summary must be completed (see section 9.3).

Note:

- Refer to the <u>Glossary</u> for key terms and definitions
- Even if no gifts or loans were received and no electoral expenditure was incurred for the election, an ESR must still be lodged.
- Submitting an ESR is <u>not</u> the same as lodging an election funding claim.
 Please see state <u>Fact sheet 25 Election funding claims</u> for more information on how to claim election funding.

9.1 Disclosing electoral expenditure individually

To disclose individual amounts of electoral expenditure or gifted electoral expenditure in an ESR, please use the following instructions.

If <u>no amounts</u> need to be disclosed, please refer to steps 1 to 6 below.

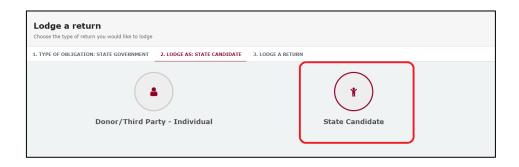
1. Click the maroon **Lodge return** button in the upper right corner of EDS.



2. Under Type of Obligation, select **State Government**.

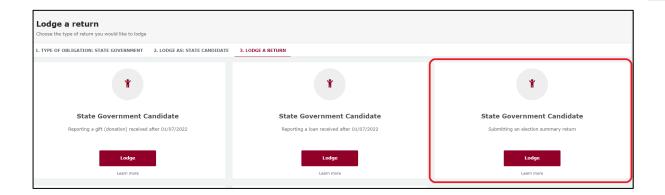


3. Select **State Candidate** on the Lodge As screen.

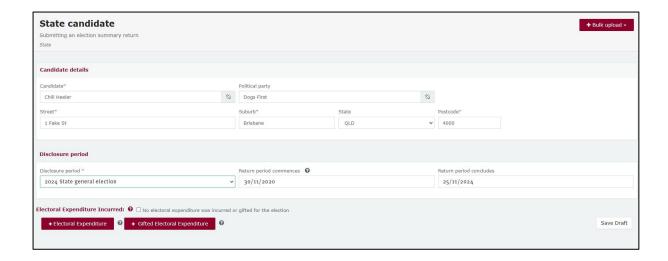


An agent submitting a return on behalf of a state candidate will select
 Agent for State Candidate.

4. Choose the Lodge button under Submitting an election summary return.



5. Your candidate details will be pre-filled. If you have contested more than 1 election, make sure to choose the correct election under **Disclosure period**.



- An agent lodging an ESR for their candidate will need to enter the candidate's details.
- Return period commences and Return period concludes dates will be populated automatically after Disclosure period has been selected.
- The Disclosure period will auto-populate if you have only contested 1 election.

If you did <u>not</u> incur any electoral expenditure or gifted electoral expenditure
for the election, check the **No electoral expenditure was incurred or gifted**for the election box. Then choose **Next** and proceed to <u>section 9.3 -</u>
 <u>Completing the return summary</u>.

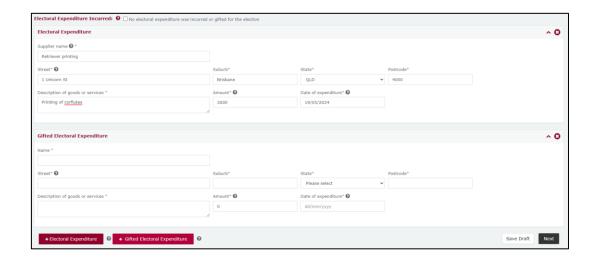
Otherwise, skip to step 7 below.



7. To disclose an item of expenditure, choose the + Electoral expenditure or + Gifted electoral expenditure buttons at the bottom of the page depending on the type of expenditure incurred.

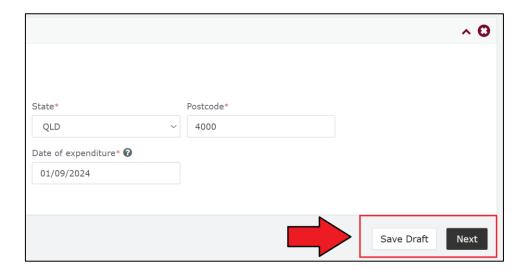


8. Enter all mandatory fields including name, address, description of goods or services, amount and date of expenditure.



 Select + Electoral Expenditure or + Gifted Electoral Expenditure at the bottom of the page to enter additional items. 9. Once you have entered all items, you can choose the **Next** button in the lower right hand corner.

If you want to complete this return later, you can choose **Save Draft** at any time. Previously saved drafts can be found under **Drafts** in the side menu.

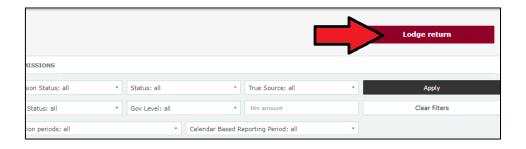


10. Skip to section 9.3 - Completing the return summary to finalise your ESR.

9.2 Disclosing electoral expenditure using a bulk upload spreadsheet

To disclose multiple amounts of electoral expenditure or gifted electoral expenditure in an ESR, please use the following instructions.

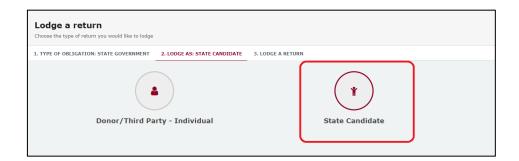
1. Click the maroon **Lodge return** button in the upper right corner of EDS.



2. Under Type of Obligation, select **State Government**.

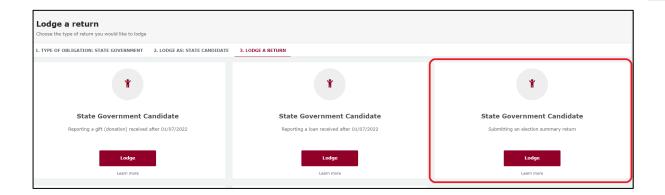


3. Select **State Candidate** on the Lodge As screen.

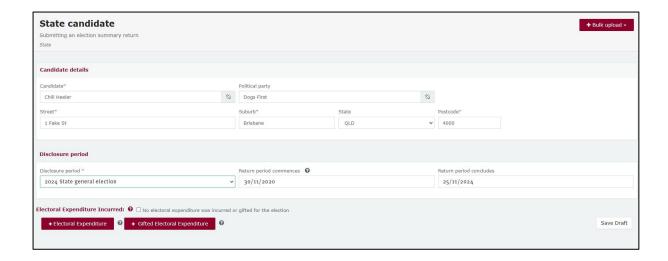


An agent submitting a return on behalf of a state candidate will select
 Agent for State Candidate.

4. Choose the Lodge button under Submitting an election summary return.



5. Your candidate details will be pre-filled. If you have contested more than 1 election, make sure to choose the correct election under **Disclosure period**.

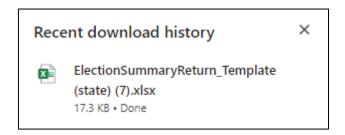


- An agent lodging an ESR for their candidate will need to enter the candidate's details.
- Return period commences and Return period concludes dates will be populated automatically after Disclosure period has been selected.
- The Disclosure period will auto-populate if you have only contested 1 election.

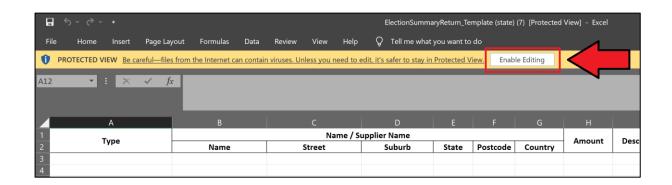
6. Select the red **+ Bulk upload** dropdown menu in the upper right corner of the page and then choose **Download template**.



7. Open the excel file from your recent downloads.



8. Select Enable Editing at the top of the Excel spreadsheet (if necessary).



9. Enter all mandatory fields in the spreadsheet

Туре	Name / Supplier Name						A	Description of goods as consists	Date of expenditure
	Name	Street	Suburb	State	Postcode	Country	Amount	Description of goods or services	Date of expenditure
Electoral Expenditure	Printer Shop Y	1 Queen St	Mount Isa	QLD	4825		\$4,500.00	Printed flyers for mailouts	7/07/2024
Gifted Electoral Expenditure	Printer Shop T	1 Print St	Brisbane	QLD	4000		\$3,000.00	Printed business cards	10/08/2024

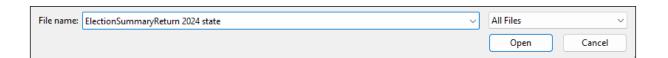
- Ensure you enter data from the top row. Leaving the top rows blank may cause errors when you upload the template to your return.
- Please do not change, add or remove any of the spreadsheet headings or columns, otherwise the template will not upload properly. This includes any wording copied and pasted from another document – it must match the options displayed.
- Country is only required for overseas addresses.

Handy tip! To save time, download the bulk upload template at the beginning of your election spending and complete it as expenditure is incurred.

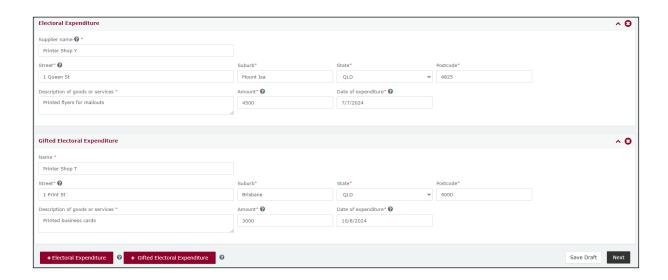
- 10. Save the file to a safe location on your device.
- 11. Return to EDS and use the **+ Bulk upload** dropdown menu to choose **Upload template**.



12. Select the bulk upload spreadsheet from where it is saved on your computer.

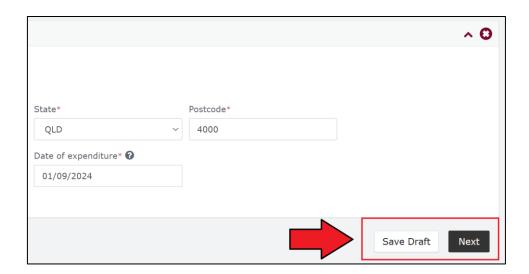


13. The items of electoral expenditure and gifted electoral expenditure will populate the page. Check to make sure there are no missing fields or errors.



14. If you are finished adding items of electoral expenditure, you can choose the **Next** button in the lower right hand corner.

If you want to complete this return later, you can choose **Save Draft** at any time. Previously saved drafts can be found under **Drafts** in the side menu.



15. Continue to section <u>9.3 – Completing the return summary</u> to finalise your ESR.

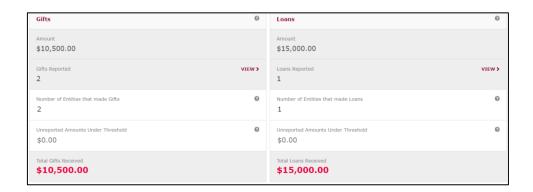
9.3 Completing the return summary

The return summary page displays a summary of all gifts, loans, electoral expenditure and gifted electoral expenditure disclosed for your disclosure period.

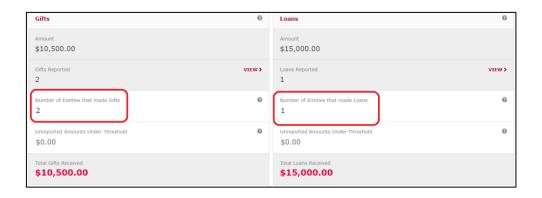
To complete the return summary section and lodge your ESR, please use the following instructions.

 The Gifts and Loans quadrants display the total amount of gifts and loans previously reported in EDS using the earlier instructions in this user guide.

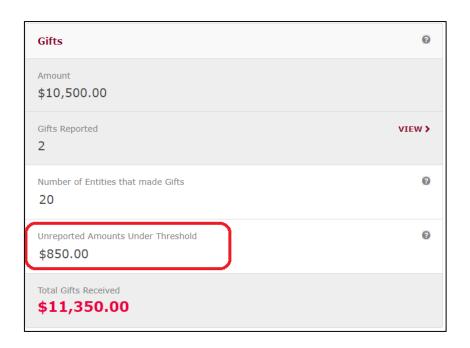
You can click the **View** button to see further details about these gifts and loans in a new browser window.



2. The numbers in the **Number of Entities that made Gifts** or **Loans** fields are based on any gifts or loans previously reported in EDS. These fields are editable. You should update the numbers to reflect the total number of entities that made gifts or loans to you during your campaign. This must include entities that made gifts or loans under \$1,000.



The Unreported Amounts Under Threshold field is also editable. In this
field, enter the total value of any gifts or loans received under \$1,000 that have
not been previously reported in EDS.



Example

The screenshot above displays the candidate having previously disclosed 2 gifts in EDS totalling \$10,500.

During their disclosure period, the candidate also received several smaller gifts from 18 other donors totalling \$850. This amount is entered in the **Unreported Amounts Under Threshold** field and the **Number of Entities that made Gifts** is updated from 2 to 20.

The **Total Gifts Received** will automatically update from \$10,500 to \$11,350 (Amount + Unreported Amounts Under Threshold = Total Gifts Received).

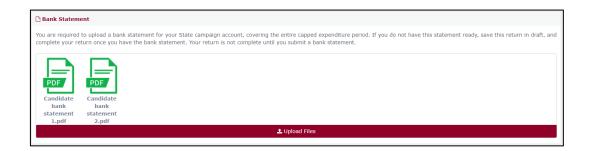
The Loans section is calculated in a similar fashion to the Gifts section.

 The Electoral Expenditure Incurred and Gifted Electoral Expenditure fields are based on the electoral expenditure disclosures added in the previous steps of this guide.

Check to ensure the **Total Electoral Expenditure Incurred** and **Total Gifted Electoral Expenditure** accurately reflect your own records.

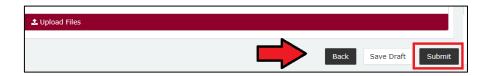


5. Under the **Bank Statement** section, select **Upload Files** to upload the bank statement for your state campaign bank account.

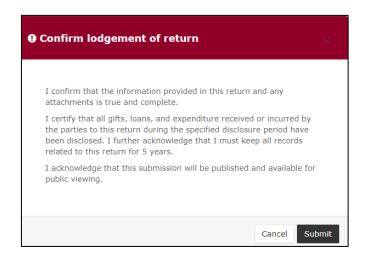


- Multiple files can be uploaded at once by holding down your Ctrl button or by selecting Upload Files for each file.
- The bank statement must cover your full disclosure period.
- 6. Choose **Submit** to lodge your ESR in EDS.

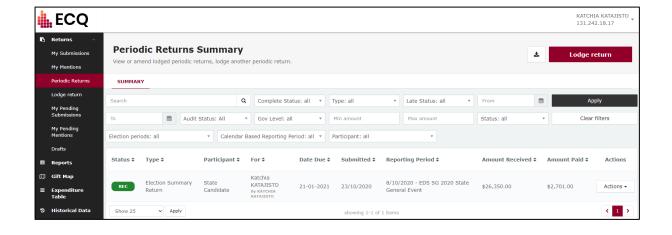
If you want to complete this return later, you can choose **Save Draft** at any time. Previously saved drafts can be found under **Drafts** in the side menu.



- If no amounts were disclosed, the button will appear as Submit Nil Return.
- 7. Review the message in the **Confirm lodgement of return** box and then select **Submit**.



8. Once submitted, the ESR will display under the **Periodic Returns Summary** page and on the public **Reports** page.



 If you realise you have made an error after submitting your return, please refer to <u>section 10 - Amending a return in EDS</u> for instructions on how to request an amendment.

10. Amending a return in EDS

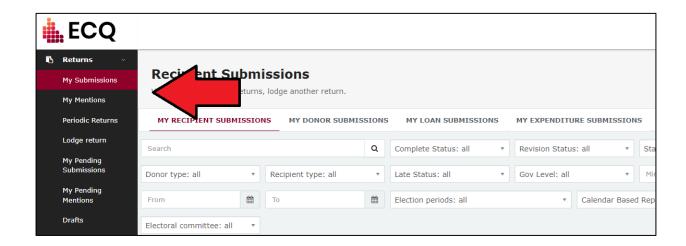
If you have made an error or omission in a return that you have previously lodged in EDS, you can request that the ECQ amend the return.

Existing returns are found under the side menu options as follows:

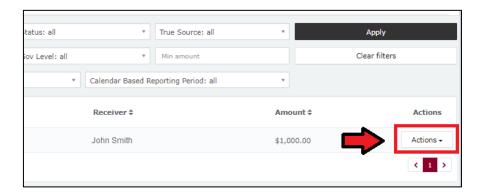
- My Submissions
 - My Recipient Submissions displays existing returns for gifts received
 - My Donor Submissions displays existing returns for gifts made
 - My Loan Submissions displays existing returns for loans received
 - My Expenditure Submissions displays existing returns for electoral expenditure incurred (local government only).
- **Periodic Returns** displays existing periodic and election summary returns.

To request an amendment to a return in EDS, please use the following instructions.

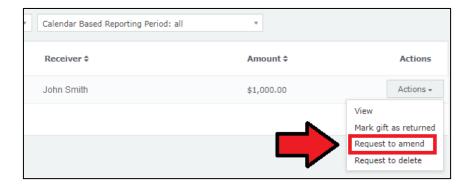
1. When you are logged into EDS, select **My Submissions** or **Periodic Returns** from the left side menu.



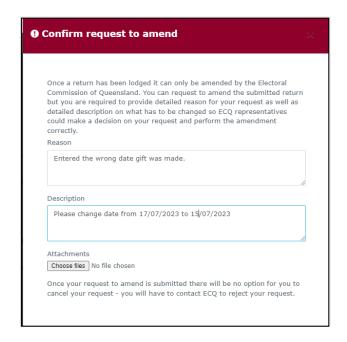
 If required, click the relevant tab to locate your return (e.g. My Recipient Submissions). 2. Find the return you wish to amend and click the **Actions** dropdown.



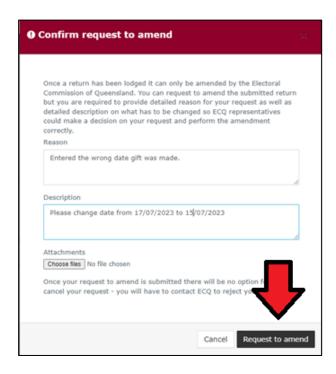
3. Select Request to amend.



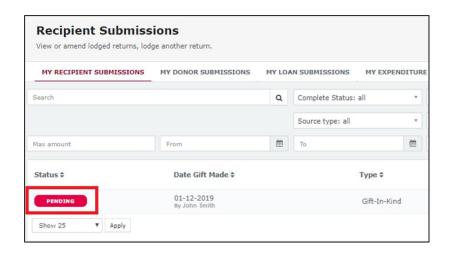
In the pop-up box, enter a **Reason** for amending the return and a
 Description of the change requested.



- Files can be attached to support your request by selecting Choose Files and uploading the files from your device.
- 5. Choose the **Request to amend** button to submit the request.



6. The return **Status** now displays as **Pending**. The return is temporarily removed from the public Gift Map and Reports page.



 You will receive an email once the amendment has been processed by ECQ.

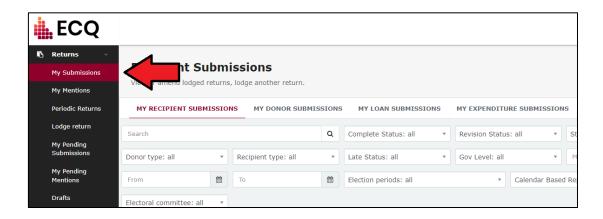
11. Mark a gift as returned in EDS

If you have lodged a return in EDS for a gift that has since been given back to the donor, you should mark the gift as returned.

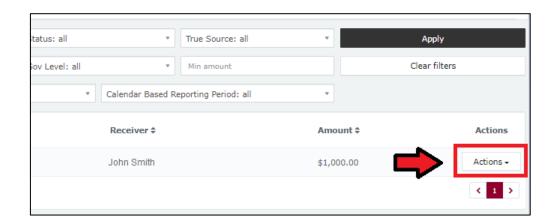
Note: Only the recipient of a gift can mark the gift as returned.

To mark a gift as returned in EDS, please use the following instructions.

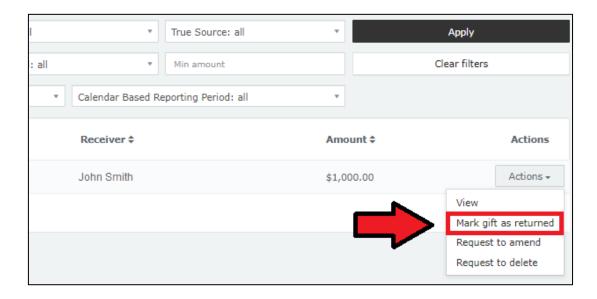
1. Select My Submissions on the side menu.



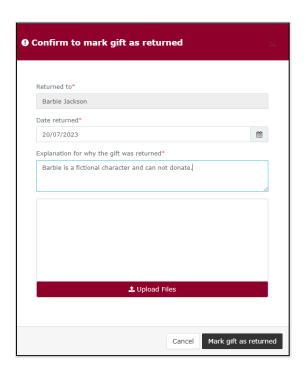
- If required, click the My Recipient Submissions tab to display existing returns for gifts you have received.
- 2. Find the return for the gift you wish to mark as returned, then click the **Actions** dropdown.



3. Select Mark gift as returned.

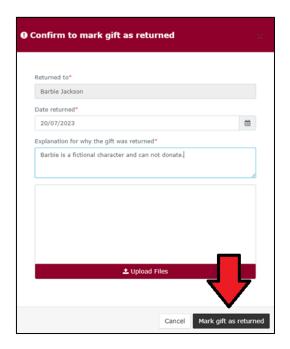


4. In the pop-up box, enter the **Date returned** and an **Explanation for why the gift was returned** for your returned gift.

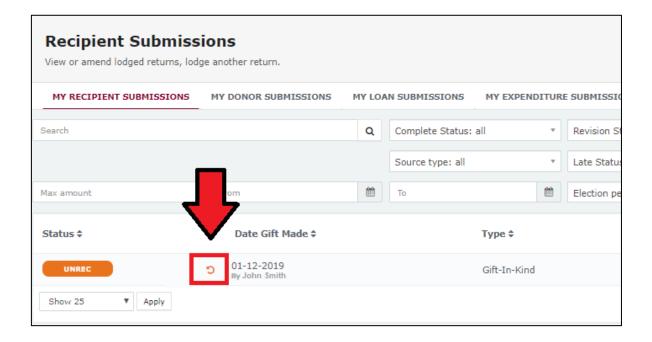


Files to support returned gifts can also be attached by selecting Upload
 Files and uploading from your computer.

5. Click Mark gift as returned.



6. A returned symbol (\circlearrowleft) will display next to the return to indicate its status. This symbol will also display on the public Gift Map and Reports page.



 You and the donor of the gift (if they are registered in EDS) will receive an email confirming the gift has been marked as returned.