

Entering a Candidate Loan

Candidate loans need to be entered in two places in CrimsonFiler: in **Sched A** (line 13) and **Sched C**.

Enter the Candidate Loan as an **Other Receipt** in Crimson under the **Treasury** menu. For further information, see the [Crimson: Other Receipts – Candidate Loan \(Schedule A\)](#) guide on the HelpDesk.

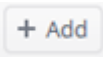
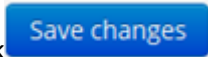
If a Candidate loan is entered in Crimson via **Other Receipts, and the **Import from Crimson** button on the **Main** tab is used in CrimsonFiler to load that data, then the loan will import with all receipts for **Schedule A** with corresponding entries in **Schedule C**. (You may also import these schedules individually by using the **Import from Crimson** button in each schedule tab.)

Note: Candidate loans correctly entered in Crimson will later pull line SA13a information from Crimson into Schedule A and C in CrimsonFiler if the loan is new within the report's date range. Otherwise, all reported Schedule C loan information will carry over in schedule C of the next report from within CrimsonFiler.

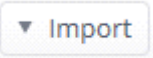
Entering a Candidate Loan in Schedule A

If you DO NOT enter the Candidate loan in Crimson, then there are two other options to add the loan(s) to **Sched A** of the report:

Option 1) Manually

1. Click  to add the candidate loan and select "Candidate" under **Type**.
2. Enter the candidate's name and address, but leave the **Organization** field blank.
3. Make sure to enter a **Tran ID** (unique ID for the report).
4. Select line number **SA13A: Loan from Candidate**.
5. Complete the FEC **Description** and the optional FEC **Memo Text** fields.
6. Enter the **Amount**, **Date**, **Election**, and **Election Year** then click .

Option 2) Import


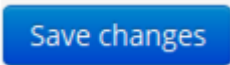
1. If you want to import the Candidate loan (w/ an Excel file only), click on .
2. Follow **Step 1: Upload file** and **Step 2: Map Fields**.
3. Click **Step 3: Validate Now** to check for errors. If errors exist, correct them and repeat validation.
4. Once validated, click **Import Now**.
5. Select **Append** so that you're adding this loan to the existing receipts data or **Replace** if you need to replace the original data.
6. Once the file is imported, you will receive a new window confirming # of records imported.

Entering a Candidate Loan in Schedule C

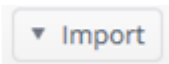
In the **Sched C** tab of your CrimsonFiler report, you can enter the Candidate loan in three ways:

Option 1) Manually

Entering a Candidate Loan

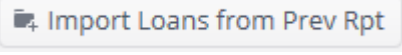
1. Click  to add the candidate loan and select "Candidate" under **Type**
2. Enter the candidate's name and address, but leave the Organization field blank.
3. Make sure to enter a **Tran ID** (*note that the Tran ID CANNOT be the same as the **Tran ID** used for the **Sched A** entry of the loan).
4. Select line number **SC/10 - Debts and Obligations Owed by the Committee** as the Line number and then select **13A – Loans made or guaranteed by the Candidate** from the **Receipt Line** drop-down menu to link the entry to the **Sched A** receipt.
5. Enter the loan amount in the **Loan Amount** field, any funds already paid back in the **Payment to Date** field (or 0 if none), and the difference between the two in **Outstanding Balance** field *Be sure to have either the **Personal Fund** or **Secured** check box marked if applicable.
6. **Date Incurred** should reflect the same date as the **Sched A** entry – the date the contribution was received by the committee.
7. Enter the **Due Date Terms**, if they apply. If not, just enter "NONE" in that field. If interest is being charged, enter it into the **Interest Rate (% APR)** field, or enter "0" for no interest.
8. Select the election cycle and enter the election year.
9. Enter the candidate's info including the candidate FEC ID in the fields in the **Lender Candidate** box, then click  to finish.

Option 2) Import

1. If you want to import the Candidate loan (w/ an excel file only), click on .
2. Follow **Step 1: Upload file** and **Step 2: Map Fields**, **Step 3: Validate**, then click **Import Now**.
3. Select **Append** so that you're adding this loan to the existing receipts data or **Replace** if you want to replace the original data.
4. Once the file is imported, you should receive a new window confirming how many records were successfully imported.

Option 3) Import from Previous Report

Candidate loans can be carried over from your most recently filed previous report directly in Crimson Filer.

1. Click  to import Candidate loan info from a previous report.
2. Select **Yes** when asked, "Are you sure to import now?"
3. Select either **Append** if you want to add this info to the report's existing data or **Replace** if you want to replace the original data.
4. Once the file is imported, you should receive a new window confirming how many records were successfully imported.