
Lunch and Learn: Bulk Uploads And Linking Receipts

*Candidacy and Campaign Finance
Division*

Allen Norfleet, Director

Erin Dennis, Deputy Director

*Kevin Gillogly, Public Finance
Program Manager*



MARYLAND STATE
BOARD OF ELECTIONS
Verified. Open. Trusted. Empowering.

Presented on September 15, 2025

Welcome to Lunch and Learn

- A service provided by the MD State Board of Elections (SBE) and the Division of Candidacy and Campaign Finance (CCF) to assist candidates, their advocates and the citizens of Maryland on how to operate as a public finance (PF) candidate.
- Twice monthly program
- Understand the rules of PF and how they differ from a traditional / regular candidate committee.
- Understand the mechanics of reporting your transactions into MD Campaign Reporting Information System (CRIS).

Where To Find The Previous Recordings

Gubernatorial Public Funding
County Public Funding

Campaign Finance

- > [Introduction](#)
- > [Campaign Finance Database](#)
- > [Summary Guide](#)
- > [Declaratory Rulings](#)
- > [IRS](#)
- > [Gubernatorial Public Funding](#)
- > [County Public Funding](#)
- > [Complaint Form](#)
- > [Procurement](#)
- > [Disclosure of Contributions](#)
- > [Disclosure of Contributions Citations](#)
- > [Forms](#)
- > [Independent Expenditures](#)
- > [Reporting Schedule](#)
- > [Advisories/Guidance/](#)

Introduction

Campaign Finance Database

The campaign finance database can be used to:

- [Review information about campaign committees.](#)
- [Review filed reports submitted by Campaign Finance Entities](#)
- Search [contributions](#) and [expenditures](#) reported by Campaign Finance Entities
- [Title 14 FAQ](#)

Maryland Campaign Reporting Information System

Welcome to Maryland Campaign Reporting Information System
Verified. Open. Trusted. Empowering.

Top Fundraising
\$16,704.00 was raised by our top 10 committees.
The Top Ten Exemptions list identifies the committees that have received the highest total contributions.

Committees
Browse committees and financial information.

Contributions
Explore contribution details by donor or amount.

Expenditures
Find out how committees are spending their funds.

Looking at Previous Recordings

IV. Public Election Fund Education Webinars

The State Board of Elections (SBE) has a twice monthly training program to assist all members of your public finance campaign team to apply the best practices and avoid mistakes.

1. What is Public Financing Webinar from July 14, 2025

- [Webinar](#)
Passcode: #NbjBzt4
- [About Public Financing of Campaigns \(PDF\)](#)

2. Getting Started with Public Financing in MD CRIS from August 4, 2025

- [Webinar](#)
Passcode: 7g^azA0k
- [Getting Started with Public Financing in MD CRIS \(PDF\)](#)

3. How to Record Your Transactions from August 18, 2025

- [Webinar](#)
Passcode: %v9*iUNIX
- [How to Record Your Transactions \(PDF\)](#)

4. Finding What You Need from MD SBE & Is My Contribution Card Correct from September 15, 2025

- [Webinar](#)
Passcode: V8s\$bE&N
- [Finding What You Need from MD SBE & Is My Contribution Card Correct \(PDF\)](#)

Upcoming Schedule for Education and Training Videos

Upcoming Schedule

◦ [Finding What You Need from MD SBE & Is My Contribution Card Correct \(PDF\)](#)

Upcoming Schedule for Education and Training Videos

Here is the schedule through January 2026.

Date	Time	Subject
Mon Sep 29	Noon	'Bulk Uploads', 'Recording & Linking Receipts'
Mon Oct 20	Noon	'Submitting My Initial Matching Fund Report'
Mon Nov 03	Noon	'Troubleshooting Common PF Issues'
Mon Nov 17	Noon	'Welcome to the new MD CRIS'
Mon Dec 01	Noon	'New MD CRIS: How to Add / Amend Transaction'
Mon Dec 15	Noon	'New MD CRIS: How to Link / Review Data'
Mon Jan 05	Noon	'New MD CRIS: How to File Your Submissions'
Mon Jan 19	Noon	'Handling Your 1 st Required Report'

[RSVP here](#) (long form down below)

V. Summary of Public Campaign Financing Laws

PF is Based on Compliance

- You have to be 100% transparent
- You have to record every transaction in CRIS
 - Manually, or
 - Bulk Upload
- Capture & Upload the receipt from wherever you stored it
 - In a pdf
- Then link the receipt (pdf) with the correct transaction in CRIS

Going Through the Summary Guide

- Depends on your county
- Look for the portion that mentions linking and uploading receipts

III. Summary Guide for Public Election Fund (in PDF)

- [Anne Arundel County](#)
- [Baltimore City](#)
- [Baltimore County](#)
- [Howard County](#)
- [Montgomery County](#)
- [Prince George's County](#)

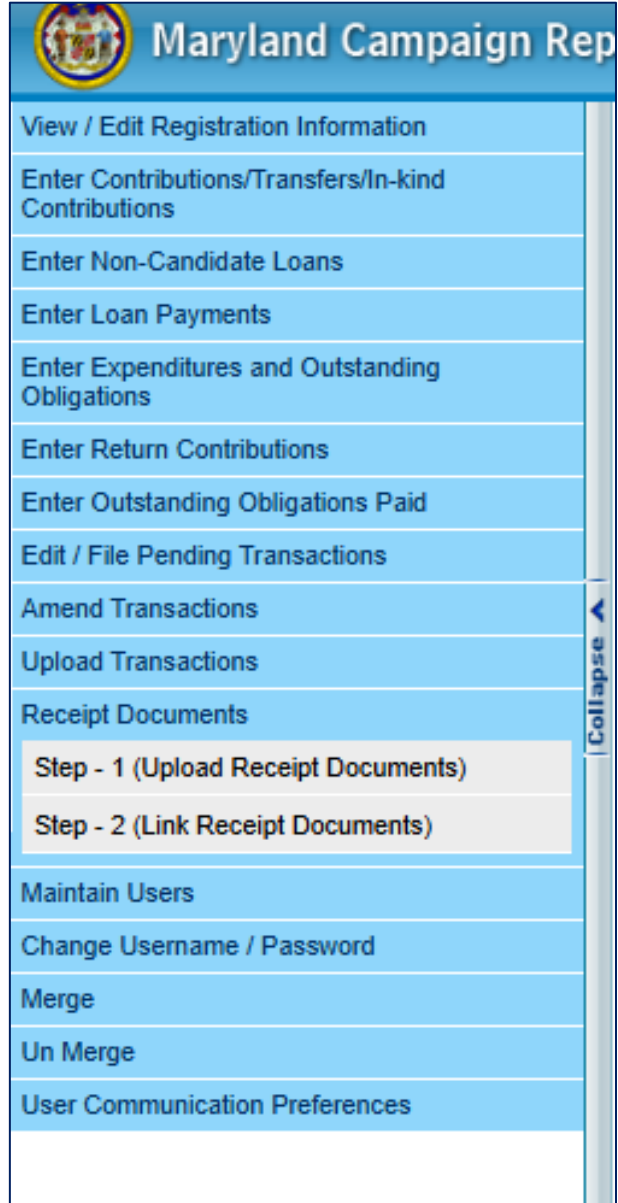
The Three Steps You Need to Get Your Contribution Matched

1. Get all transactions (Qualifying contributions, non-qualifying contributions and expenditures) recorded in MD CRIS
 - Applies to all candidate committees in MD
2. Get receipts for all transactions uploaded in MD CRIS
 - Applies to only to PF candidate committees in MD
3. Get all receipts linked with the correct transaction in MD CRIS
 - Applies to only to PF candidate committees in MD

The Key Things You Need to Capture

- Seven Key Items to Capture
 - Contribution Date
 - Contribution Amount
 - Check Number / Credit Card / EFT / Cash (up to \$100)
 - Name of the Donor
 - Address of the Donor
 - Attest they are a County (or State) resident
 - Attest that the money is theirs and not given to them
 - Digital Signature / Actual Signature

Joint accounts have to be from a single person. You can't split a donation between two (or more) parties.



Menu – Your Home Base

When you get lost.
Always come back to the
Menu. It's your home
base.

Your First Donation

Contribution type Contributor type

Contributor Information

Search Existing Contributors

Search Contributor Name To avoid over-contribution limits, the contributor name field must be entered identically for each contribution received from the contributor.

or- Enter Contributor Information

Last Name* First Name* Middle Name

Residence Address

☒ Domestic(US) ☐ Overseas

Address Line 1* Address Line 2 County of Residence

City* State* Zip* -

Employer Information (Required information for contributions received from individuals \$500 or more in the aggregate)

Contributor Occupation Employer Name

☐ I / We have sent a written letter to the above contributor requesting employer/occupation information. The contributor has failed to supply this information.

Failure to enter address information will result in a non-compliance flag

If you use the “Search Existing Contributors” features, you are less likely to get duplicate donors

Your First Donation

Contribution General Information

Filing Period* 08/19/2025 Matching Fund Report Gubernatorial

Contribution Type* Check

Contributor Type* Individual

Search Existing Contributors

Search Contributor Name parran

-or- Enter Contributor Information

Last Name* Parran

First Name* Ebony

Middle Name

Residence Address

☒ Domestic(US) ☐ Overseas

Address Line 1* 151 West Street

Address Line 2 Apt 200

City* Annapolis

State* Maryland

County of Residence Anne Arundel

Zip* 21401

Employer Information (Required information for contributions received from individuals \$500 or more in the aggregate)

Contributor Occupation --Select Occupation--

Employer Name

☐ I/We have sent a written letter to the above contributor requesting employer/occupation information. The contributor has failed to supply this information.

Contribution Details

Contribution Date* 08/15/2025

Contribution Amount* \$100.00

Check Number 156

Cash Cumulative Amount

Election Cycle Cumulative Amount

Legal Cash Limit \$100

Legal Contribution Limit Check the appropriate Law for Limits

Comments

Here you enter the filing period, contribution type, contributor type.

In the second box you add donor's name, address, county, date of the donation, how it was paid, amount.

Montgomery County only: \$500

Enter Contributions/Transfers/In-Kind Contributions Kevin Cilligly (Cilligly, Kevin People for) ?

Instructions
Please select contributor type as "Individual – Matching Fund Request" for Matching Fund Requests, otherwise they will not be considered for matching funds.

Contribution General Information

Filing Period* 08/19/2025 Matching Fund Report Gubernatorial
Contribution Type* Check
Contributor Type* Individual

Contributor Information

Search Existing Contributors
Search Contributor Name To avoid over-contribution limits, the contributor name field must be entered identically for each contribution received from the contributor.

-or- Enter Contributor Information

Last Name* Norfleet First Name* Allan Middle Name

Residence Address
☒ Domestic(US) ☐ Overseas
Address Line 1* 123 Main Address Line 2 County of Residence Montgomery
City* Silver Spring State* Maryland Zip* -

Employer Information (required information for contributions received from individuals \$500 or more in the aggregate)
Contributor Occupation Administrative and Management Employer Name MD SBE
☐ I / We have sent a written letter to the above contributor requesting employer/occupation information. The contributor has failed to supply this information.

Contribution Details

Contribution Date* 08/15/2025
Cash Cumulative Amount
Election Cycle Cumulative Amount
Contribution Amount* \$500.00
Legal Cash Limit \$100
Legal Contribution Limit Check the appropriate Law for Limits
Check Number 245
Comments
Comments will not appear on filed report

Save Clear Cancel

151 West Street, Suite 200 Annapolis, MD 21401 Phone: 410-266-2800 Fax: 410-274-2018 Email: info@stateboard.org

You need to record the employer and occupation for any donation of exactly \$500.00.

If you forget something

uat-legacy-mdcris.abdgh.com says

Enter Zip

OK

Bulk Uploads Are Possible

 Maryland Campaign Rep	
View / Edit Registration Information	Collapse ▲
Enter Contributions/Transfers/In-kind Contributions	
Enter Non-Candidate Loans	
Enter Loan Payments	
Enter Expenditures and Outstanding Obligations	
Enter Return Contributions	
Enter Outstanding Obligations Paid	
Edit / File Pending Transactions	
Amend Transactions	
Upload Transactions	
Receipt Documents	
Step - 1 (Upload Receipt Documents)	
Step - 2 (Link Receipt Documents)	
Maintain Users	
Change Username / Password	
Merge	
Un Merge	
User Communication Preferences	

Main Page of Bulk Uploads

The screenshot shows the 'Main Page of Bulk Uploads' in the Maryland Campaign Reporting Information System. The page has a blue header with the system name and user 'Kevin Gillogly'. The main content area is titled 'Upload Transactions' and includes links for downloading templates for contributions and expenditures for various Excel versions. It features an 'Upload File' section with a dropdown for 'Filing Period Name' (set to '08/19/2025 Matching Fund Report Gubernatorial'), a 'Transaction Type' dropdown, and a file selection button. Below this are 'Upload', 'Clear', and 'Check Status' buttons. A 'Note' section provides instructions on file uploads and error handling. A table titled 'Currently processing jobs:' shows 'No records to view.' At the bottom, there is an 'Other downloads' section with a link for 'Contributor/Payee Ids'.

Download Templates

Excel 2003 and Earlier: [Contributions](#) [Expenditures](#)

Excel 2007 and Later: [Contributions](#) [Expenditures](#)

Contributions – version C1.6 – 07/13/2018
Expenditures – version E1.6 – 07/13/2018

Upload File

Filing Period Name: 08/19/2025 Matching Fund Report Gubernatorial Transaction Type: --- Select Type --- Select a File: Choose File No file chosen

Upload Clear Check Status

Note:

- You must use the templates above, if you do not it will not upload.
- Deleting an uploaded file does not delete the uploaded transactions. To delete uploaded transactions please navigate to Edit/File Pending Transactions screen and delete the transactions.
- DO NOT reupload successfully uploaded transactions as this will cause duplicates
- You cannot upload payments towards outstanding obligations, loans, or returned contributions. Payments made towards these items must be entered via appropriate screens in the system.

Status:

- **Processed-No Errors** - Transactions have uploaded successfully.
- **Processed-Errors** - Transactions have uploaded unsuccessfully. Review and correct the issues in document that was auto generated from the system containing the errors. Once the errors have been corrected within the generated document, please use that file to upload the errored transactions again. Please download the process error file and go to column AE in the excel file where the system has provided the auto-generated error field names. Please correct those errors as per the template instructions and then upload that file again.

Job Id #	Uploaded Date	File Name	Number of Rows	Status	Actions
Currently processing jobs:					
No records to view.					

Other downloads

[CCFIDs](#) [Contributor/Payee Ids](#)

Where to Upload Bulk Transactions

Contributions – version C1.6 – 07/13/2018

Expenditures – version E1.6 – 07/13/2018

Upload File

Filing Period Name10/07/2025 Matching Fund Report Gubernatorial

Transaction Type

--- Select Type ---

--- Select Type ---

Contribution

Expenditure

Select a File

Choose File

No file chosen

Upload

Clear

Check S

Note:

How To Record a Transaction Bulk Upload

- What your uploads will look like after you are finished.

Job Id #
Currently processing jobs:
35723
35721
35719
35670
35669

How To Record a Transaction Bulk Upload

- If you upload correctly, it will be in green.
- If you upload the same file twice they will both be in green.
 - Also, you will have double the entries.
- If you have errors in the upload your status will be in red.

	Number of Rows	Status	Actions
	1	Processed-No Errors	
	3	Processed-No Errors	
	2	Processed-Errors	
	14	Processed-No Errors	
	5	Processed-Errors	
	572	Processed-No Errors	
	2	Processed-Errors	
	572	Processed-No Errors	
	2	Processed-Errors	
	574	Processed-Errors	
	574	Processed-Errors	
	2	Processed-No Errors	
	575	Processed-Errors	

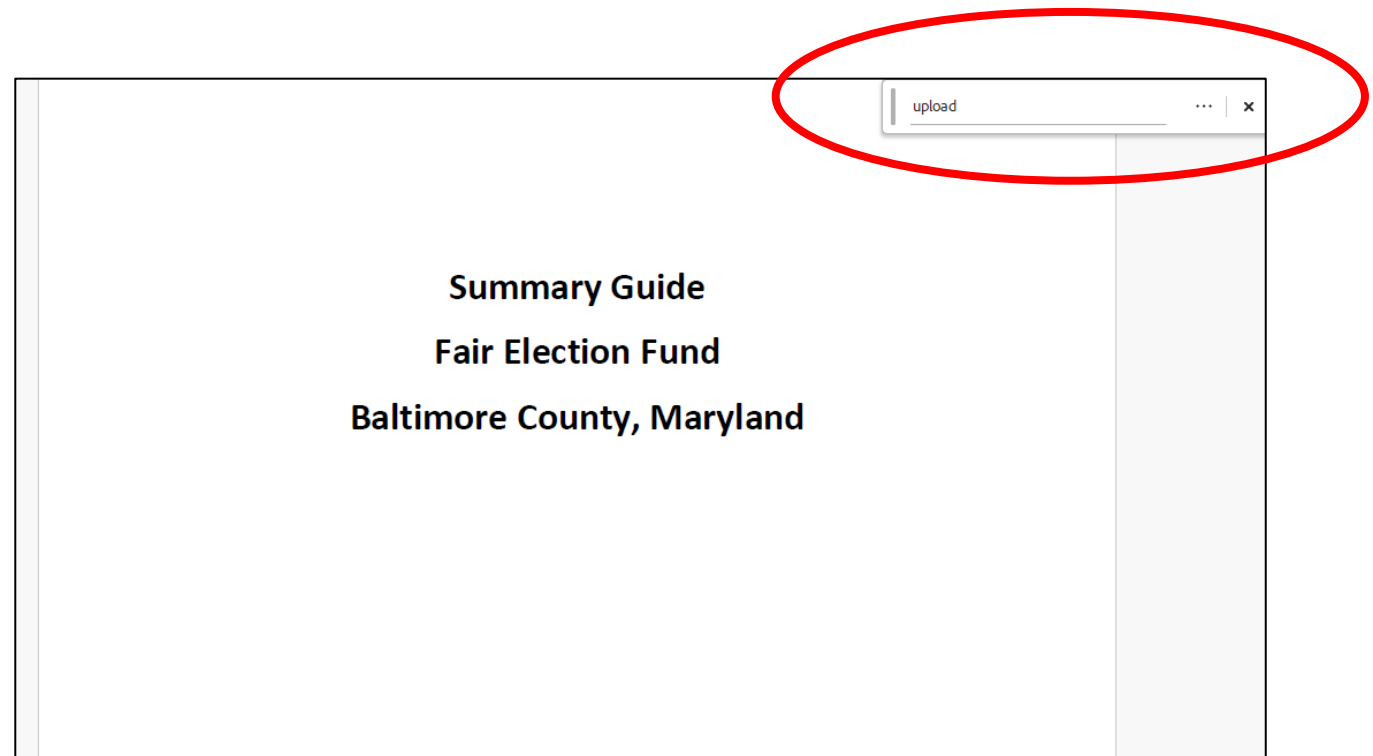
How To Record a Transaction Bulk Upload

- Which ones are duplicates?
- Look for the same file name and number of rows.

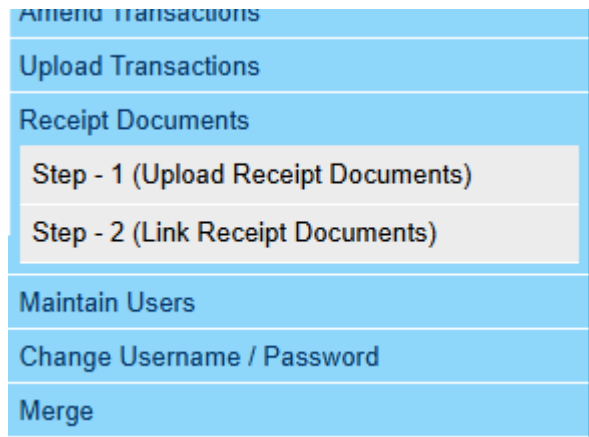
	Number of Rows	Status	Actions
xp_926202513714PM.xlsx	1	Processed-No Errors	
xp_9262025125540PM.xlsx	3	Processed-No Errors	
xp_9262025125540PM.xlsx	2	Processed-Errors	
xp_9262025124220PM.xlsx	14	Processed-No Errors	
xp_9262025124220PM.xlsx	5	Processed-Errors	
2025105156AM.xlsx	572	Processed-No Errors	
2025105156AM.xlsx	2	Processed-Errors	
2025105155AM.xlsx	572	Processed-No Errors	
2025105155AM.xlsx	2	Processed-Errors	
2025104842AM.xlsx	574	Processed-Errors	
2025104544AM.xlsx	574	Processed-Errors	
2025103755AM.xlsx	2	Processed-No Errors	
2025103755AM.xlsx	575	Processed-Errors	

How To Upload a Receipt aka Contribution Card

- Use the search feature inside of the pdf.
- Type “upload”



How To Upload a Receipt aka Contribution Card



When you get lost.
Always come back to the
Menu. It's your home
base.

How To Upload a Receipt aka Contribution Card

Dear [REDACTED]

Thank you for your generous contribution.

Please print out this contribution confirmation page for your records.

Contribution Information:
Contribution Confirmation ID: 147426612
Contribution Date: 05/05/2024 6:00 PM Eastern Daylight Time
Contribution Amount: \$50.00

Contact Information:
[REDACTED]

Account Type: MasterCard
Account Number Ending: ****5431

I understand that State and City law requires that a contribution be in my name and be from my own funds. This contribution is not being reimbursed in any manner, and is not being made as a loan. This contribution is not being made from the funds of a business entity, political action committee, labor organization, or other organization or group.

I understand that because Shannon Speed is participating in Baltimore City's public campaign finance program, I may not contribute more than \$100 to their campaign during the four-year cycle January 1, 2023 through December 31, 2026.

E-Signature: G[REDACTED]

Resident of Baltimore City: Yes

By Authority: Shannon Speed for Baltimore, Raymond Speed Treasurer

All Receipts
Have to Be in a
pdf.

How To Upload a Receipt

Step - 1 Upload Receipt Documents

Kevin Gillogly (Gillogly, Kevin People)

Upload Receipt Documents

Filing Period*

Transaction Type*

File Name*

Upload File*

Choose File

No file chosen

Please Upload .pdf,.doc,.docx extension files only.

Upload Receipt

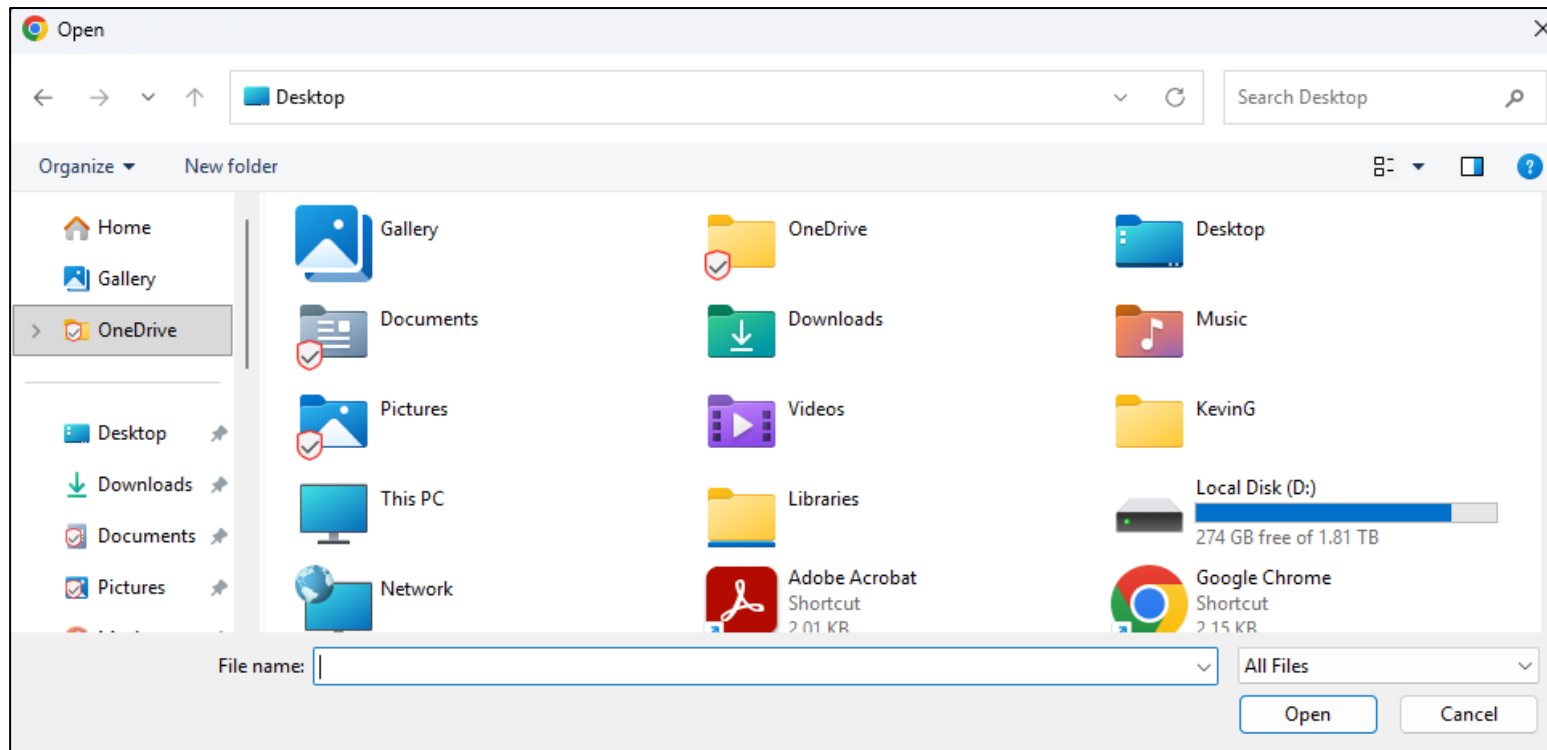
Clear

Cancel

Receipt Id	Filing Period	Transaction Type	File Name	Upload By	Upload Date	Actions
No records to view						

No bulk uploads for receipts.

How To Upload a Receipt



Your files can be on your hard drive or in the cloud.

Wherever you stored all of your receipts.

How To Upload a Receipt

Step - 1 Upload Receipt Documents

Upload Receipt Documents

Filing Period*

Transaction Type*

File Name*

Upload File* 65698 - Qi ...ng 25680.pdf
Please Upload .pdf,.doc,.docx extension files only.

Receipt Id	Filing Period	Transaction Type	File Name	Upload By
------------	---------------	------------------	-----------	-----------

Anything with a **red *** needs to have something selected.

How To Upload a Receipt

uat-legacy-mdcris.abdgh.com says

Select Filing Period

Select Transaction Type

Enter File Name

OK

If you miss something you will get this notice.

How To Upload a Receipt

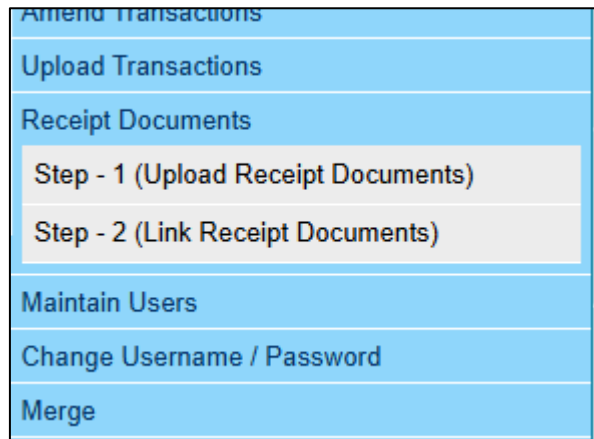
uat-legacy-mdcris.abdgh.com says

Receipt Saved Successfully

OK

If you get everything right, you will get this notice.

How To Attach a Receipt aka Contribution Card



Always come back to the Menu. It's your home base.

How To Attach a Receipt

Step - 2 Link Receipt Document to Transactions

Kevin Gillogly (Gillogly, Kevin P)

Information about the Filing Period

Filing Period* --Select Filing Period--

Information about the Transactions

Transaction Type * --- Select Type ---

Contributor / Payee Name

Transaction with linked Receipt

☐ Transactions without linked Receipt ☐ Transactions with linked Receipt

This option is used only to search the transactions with or without linked Receipts.
To search the transaction linked with specific Receipt, select the checkbox "Transactions with linked Receipt" and then select the receipt from "Linked Receipt Document" dropdown.
To link the Transactions with Receipts, first search the required transactions and then use "Link" button which will show the option to select the receipt document.

Other Information

Transaction Category -- Select Transaction Category --

Transaction Date Range - Amount Range -

Search Clear Cancel

Find the donor and the correct contribution date.

How To Attach a Receipt

Step - 2 Link Receipt Document to Transactions Kevin Gillogly (Gillogly, Kevin People for) ?

Information about the Filing Period

Filing Period* 08/19/2025 Matching Fund Report Gubernatorial ▼

Information about the Transactions

Transaction Type* Contribution ▼

Contributor / Payee Name Parran, Ebony

Transaction with linked Receipt

☐ Transactions without linked Receipt ☐ Transactions with linked Receipt

This option is used only to search the transactions with or without linked Receipts.
To search the transaction linked with specific Receipt, select the checkbox "Transactions with linked Receipt" and then select the receipt from "Linked Receipt Document" dropdown.
To link the Transactions with Receipts, first search the required transactions and then use "Link" button which will show the option to select the receipt document.

Other Information

Transaction Category Credit Card ▼

Transaction Date Range -

Amount Range -

[Search](#) [Clear](#) [Cancel](#)

Anything with a **red**
* needs to have
something selected.

How To Attach a Receipt

View / Edit Registration Information	Collapse ▲
Enter Contributions/Transfers/In-kind Contributions	
Enter Non-Candidate Loans	
Enter Loan Payments	
Enter Expenditures and Outstanding Obligations	
Enter Return Contributions	
Enter Outstanding Obligations Paid	
Edit / File Pending Transactions	
Amend Transactions	
Upload Transactions	
Receipt Documents	
Step - 1 (Upload Receipt Documents)	
Step - 2 (Link Receipt Documents)	
Maintain Users	
Change Username / Password	
Merge	

If your transaction is not there or is incomplete then you need to either enter the transaction or edit the transaction.

How To Attach a Receipt

Step - 2 Link Receipt Document to Transactions Kevin Gillogly (Gillogly, Kevin People for)

Information about the Filing Period
Filing Period* 08/19/2025 Matching Fund Report Gubernatorial

Information about the Transactions
Transaction Type* Contribution
Contributor / Payee Name

Transaction with linked Receipt
☒ Transactions without linked Receipt ☐ Transactions with linked Receipt

Transaction Category --Select Contribution Type--
Transaction Date Range - Amount Range

Search Clear Cancel

☐ Select All	Contribution Date	Contributor / Payee Name	Address	Transaction Category	Amount	Cap Amount	File Name
☐	08/15/2025	Allan Norfleet	123 Main, Silver Spring, Montgomery, Maryland 20910	Check	\$500.00	\$500.00	
☐	08/15/2025	Ebony Parran	151 West Street, Apt 200, Annapolis, Anne Arundel, Maryland 21401	Check	\$100.00	\$500.00	
☐	08/15/2025	Kevin Gillogly	7701 Takoma Ave, Takoma Park, MD 2091, Maryland 20912	Candidate Loan	\$500.00	\$500.00	

Displaying page 1 of 1, records 1 to 3 of 3

These are the contributions that don't have receipts attached.

How To Attach a Receipt

Step - 2 Link Receipt Document to Transactions

Kevin Gillogly (Gillogly, Kevin People for

Information about the Filing Period

Filing Period* 08/19/2025 Matching Fund Report Gubernatorial

Information about the Transactions

Transaction Type* Contribution

Contributor / Payee Name Norfleet, Allan

Transaction with linked Receipt

☒ Transactions without linked Receipt ☐ Transactions with linked Receipt

This option is used only to search the transactions with or without linked Receipts.

To search the transaction linked with specific Receipt, select the checkbox "Transactions with linked Receipt" and then select the receipt from "Linked Receipt Document" dropdown.

To link the Transactions with Receipts, first search the required transactions and then use "Link" button which will show the option to select the receipt document.

Other Information

Transaction Category --Select Contribution Type--

Transaction Date Range - Amount Range -

Search Clear Cancel

☐ Select All	Contribution Date	Contributor / Payee Name	Address	Transaction Category	Amount	Cap Amount	File Name
☐	08/15/2025	Allan Norfleet	123 Main, Silver Spring, Montgomery, Maryland 20910	Check	\$500.00	\$500.00	

Displaying page 1 of 1, records 1 to 1 of 1

Unlink Link

151 West Street, Suite 200, Annapolis MD, 21401 Phone: 410-269-2880 Fax: 410-974-2019 Email: ccf.sbe@maryland.gov

This how you link a receipt.

This how you link a receipt.

How To Attach a Receipt

uat-legacy-mdcris.abdgh.com says

Receipt Link successfully updated to transaction.

OK

This how you know you linked your receipt correctly.

Remember You Have to Record ALL TRANSACTIONS

- That includes the payment processing fees of a third-party vendor.
- Your recording of any contribution is the gross amount.
- What you received (the net) is the difference between the gross amount and whatever the payment processor takes out.
 - The processing fee is an expenditure. It must be recorded.

Questions

Future Lunch and Learns

- Mon. Oct. 19th, Noon. Submitting your first initial matching fund report
- Mon. Nov. 3rd, Noon. Trouble shooting common problems
- Mon. Nov. 17th, Noon. Welcome to the new MD CRIS

CCF Staff Directory

Allen Norfleet, Director Candidacy & Campaign Finance (CCF)

Allen.Norfleet@Maryland.gov

Erin W. Dennis, Deputy Director CCF

Erin.Dennis@Maryland.gov

Kevin Gillogly, Public Finance Program Manager

Kevin.Gillogly@Maryland.gov