
Lunch and Learn: How to Record Your Transactions in Public Finance

*Candidacy and Campaign Finance
Division*

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

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).

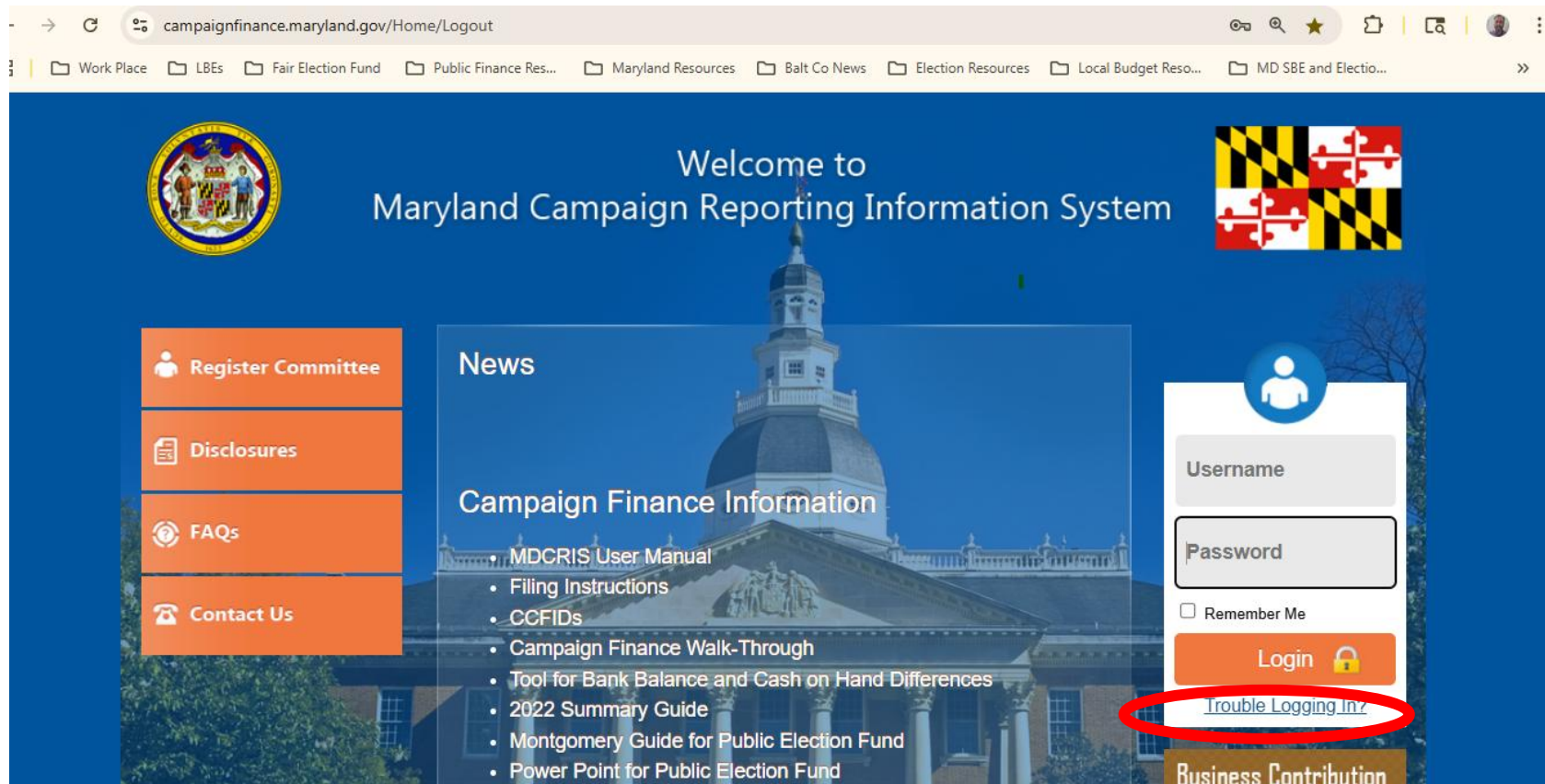
Getting Signed In for the First Time

- Once your Statement of Organization is approved, all officers will receive an email from SBE with a temporary password.
 - Username is your email. No shared emails.
- Everyone who can change your data in CRIS will be tagged that they changed or amended something.

Getting Signed In for the First Time

Username is your email.

Password has to be 12 characters, upper and lower case letters, numbers, special characters .



campaignfinance.maryland.gov/Home/Logout

Work Place LBEs Fair Election Fund Public Finance Res... Maryland Resources Balt Co News Election Resources Local Budget Reso... MD SBE and Electio...

Welcome to
Maryland Campaign Reporting Information System

Register Committee

Disclosures

FAQs

Contact Us

News

Campaign Finance Information

- MDCRIS User Manual
- Filing Instructions
- CCFIDs
- Campaign Finance Walk-Through
- Tool for Bank Balance and Cash on Hand Differences
- 2022 Summary Guide
- Montgomery Guide for Public Election Fund
- Power Point for Public Election Fund

Username

Password

☐ Remember Me

Login

[Trouble Logging In?](#)

Business Contribution

Getting Signed In for the First Time

Reporting Information System

MENU REMINDERS LOGOUT

Communication Preference

Kevin Gillogly (Gillogly, Kevin People for) ?

Please select preferred methods of communication for each committee

Committee Name	Role	Select
Gillogly, Kevin People for	Chairperson	☒ Email
		☒ Mail

Submit

Collapse

Divisions of Duties

- The three officers get emails to join.
 - The Campaign Chairperson (can also be the candidate)
 - The Treasurer (can not be the candidate)
 - The applicant candidate
- You can add a person to help with the recording of data.
 - Campaign Manager or anyone else you want to get access to YOUR account
 - Remember too many cooks spoil the batter.

Adding a New User

View / Edit Registration Information

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 My Name / Document

Merge

Un Merge

Users

Gillogly, Kevin People for (Kevin Gillogly) ?

Add New User

Expand	Username	Committee Name	First Name	Last Name	Role	Active	Actions
	bmorekevin@gmail.com	Gillogly, Kevin People for	Kevin	Gillogly	Candidate, Chairperson	☒	
	esherbert@aol.com	Gillogly, Kevin People for	Ebony	Sherbert-Parran	Treasurer	☒	

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

A Tour of the CRIS Website, Part I



Maryland Campaign Reporting Information System

☰ MENU

REMINDERS

LOGOUT AS COMMITTEE

LOGOUT

 Kevin Gillogly (Gillogly, Kevin People for) ?

Reminders

Message from Administrator

Upcoming Filing Period Due Dates

08/19/2025 Matching Fund Report Gubernatorial	08/19/2025
---	------------

Tasks	Count
My Verifications	0
Pending Verifications for this Committee	0

Pending Filing for Committee

Filing Period	Original Due Date	Unfiled Transaction Count	Filing Type	Pending Reason
No records to view.				

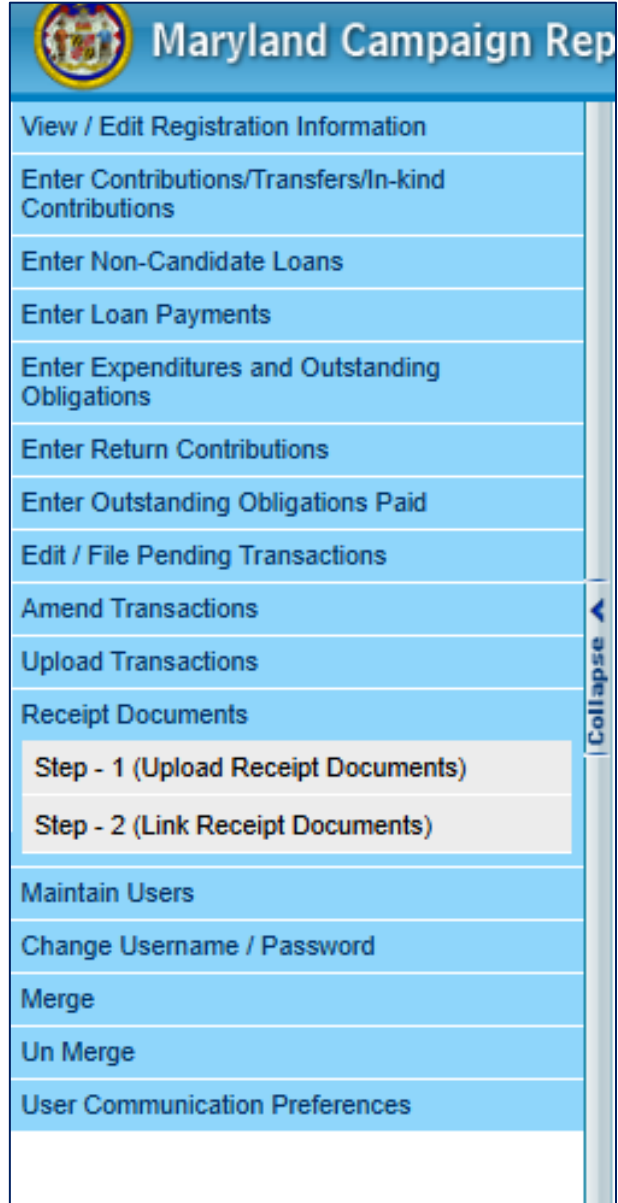
1. If Filing Type is Original?

Committee Report is pending for the Filing Period and should be filed.

2. If Filing Type is Amendment?

Committee Report should file the Amendment for the Filing Period.

3. Missed filing period ?



Menu – Your Home Base

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

A Tour of the CRIS Website, View/Edit

View / Edit Registration Information
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
Contributor/Payee
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



Maryland Campaign Reporting Information System

MENU

REMINDERS

LOGOUT AS COMMITTEE

LOGOUT

View / Edit Public Financing Committee Registration- State



Kevin Gillogly (Gillogly, Kevin People for)

?

Committee's Public Link

Print Screen

Committee Information

Authority Name*

Gillogly, Kevin People for

Certification Status:

Pending Submission

CCF ID:

15015562

Election Type	Office Type	Office Sought	Jurisdiction	Party Affiliation	Election Year	Start Date
Gubernatorial	County Office	County Council - At-Large	Montgomery	Democratic	2026	07/29/2025

Committee Name Amended Information

Committee Name	Updated By	Updated Date
Gillogly, Kevin People for	Gillogly Kevin	07/29/2025
Gillogly, Kevin People for	Gillogly Kevin	07/29/2025

Displaying page 1 of 1, records 1 to 2 of 2

Candidate Information

Name	Date of Birth	Email	Mailing Address	Public Phone	Edit
Kevin Gillogly	03/12/1958	bmorekevin@gmail.com	7701 Takoma Ave, Takoma Park, MD 2091, MD, 20912	410-269-2841	

Chairperson Information

☐ Same as Candidate

A Tour of the CRIS Website, Add Your Bank Account

Additional Contacts (Optional)

Add New Contact

Role	Name	Mailing Address	Public Phone	Contact Phone	Email	Start Date	End Date	Receive Notices	For Public	Actions
No records to view.										

Depository Information

Name of Financial Institution	Address	Account Type	Account Number	Start Date	End Date	Actions
None	None, None, None, MD, 21401	Checking	0000000	07/29/2025		  

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

Documents / Correspondence

Add Correspondence

Add Document

Document Date	Document Type	Document Description	Added By	Actions
07/30/2025	Statement of Organization		Gillogly Kevin	  
07/29/2025	Statement of Organization		Gillogly Kevin	  
07/29/2025	Statement of Organization (Original)		Parran Ebony	  

Have to Be 100% Transparent

E. RECEIPT OF CONTRIBUTIONS

A separate receipt must be obtained from the contributor with the contributor's name, residential address, and be signed by the contributor directly or by digital signature. Each receipt must have the contributor's name, residential address, and be signed by the contributor directly or by the digital signature method approved by the State Board. The signature card name must match the name of contributor to be considered a qualifying contribution.

A cancelled check does not qualify as a signed contribution receipt for matching Public Campaign Financing Fund purposes. The contributor must sign and provide a receipt as an additional document acknowledging the contribution to be a qualified contribution for public fund matching. A qualifying contribution made in bank check form must be printed with a name to match the name on the signed receipt of contribution.

- For example, a bank check has two names printed on the document, with an Anne Arundel County address, one of the names must be the name of the Anne Arundel County resident contributor.
- For an additional example, a bank check has two names printed on the document, with a Anne Arundel County address, the contributor can sign the document using the initials of one of the names printed on the check. (i.e. the name printed on the check is John A. Contributor and signed as J. A. Contributor.)

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.

Best Practices to Recording Transactions

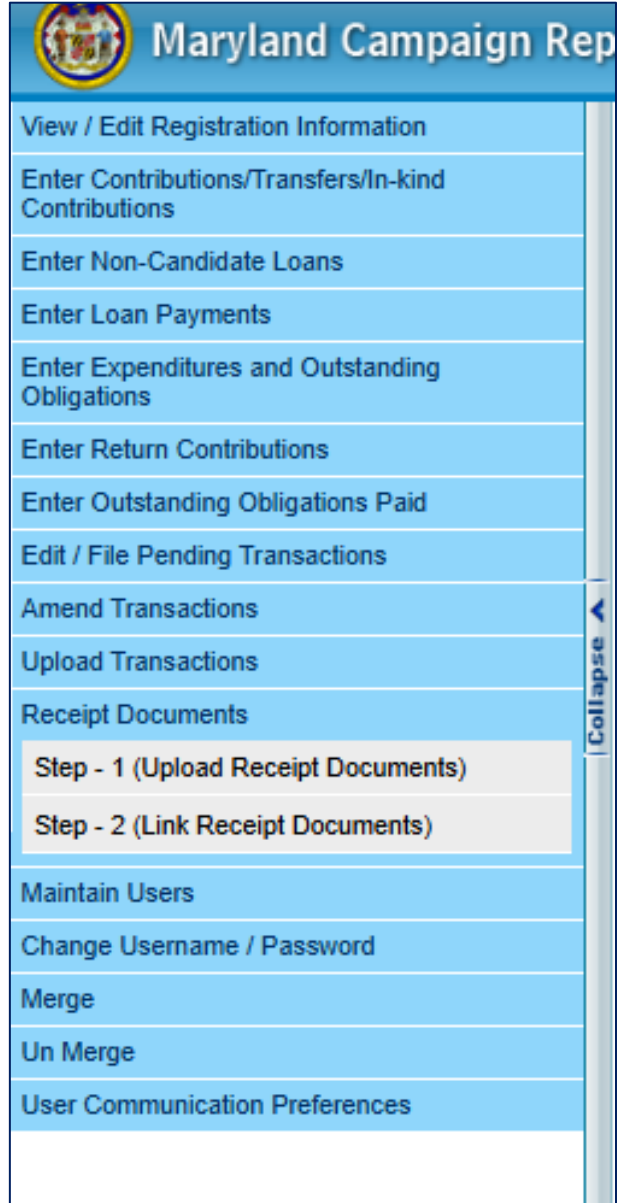


- Ten-year record retention
- Regularly balancing the committee's checkbook
- Enter Contributions/Deposits as they are received
- Add additional data-entry users
- Review the MD CRIS & Your County's Summary Guide often
- Update address, contact number, and email addresses
- Enter Expenditures as they are issued
- Create a monthly Excel Spreadsheet
- Self-report anonymous contributions

Best Practices to Get Started, Pt II



- Remember to include credit card processing charges and bank fees on campaign reports
- Remember to add your loans from the candidate or their family as a contribution.
- Once your PF candidate committee qualifies for matching funds please make sure to include the disbursement from the county (or the state – for Governor) in CRIS.
- Reach out to CCF staff for questions



Menu – Your Home Base

When you get lost.
Always come back to the
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base.

Recording A Contribution as a Loan

Contributor Information

Enter Contributor Information

Candidate Last Name* Candidate First Name* Candidate Middle Name

Mailing Address

☒ Domestic(US) ☐ Overseas

Address Line 1* Address Line 2

City* State*

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

Contribution Details

Contribution Date* 

Contribution Amount*

Cash Cumulative Amount **\$0.00** Legal Cash Limit **\$100**

Election Cycle Cumulative Amount **\$0.00** Legal Contribution Limit **Check the appropriate Law for Limits**

Initial money to open the checking account at the bank

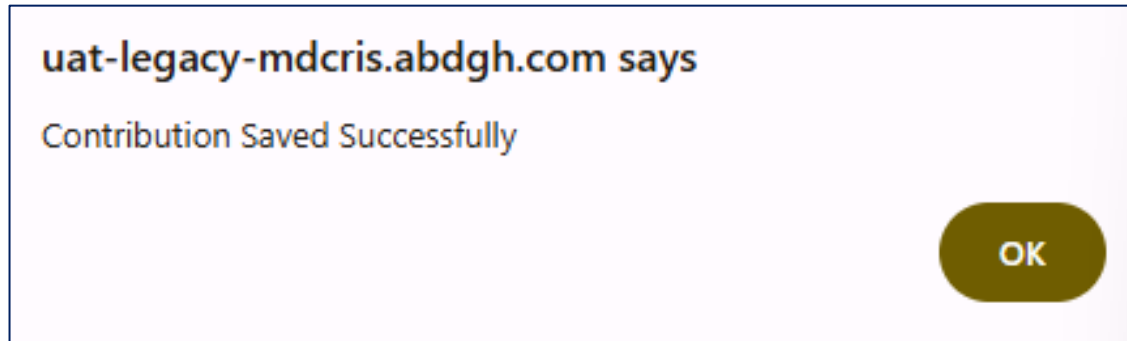
Comments

Comments will not appear on filed report

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

This is an example of a donation / loan to fund your bank account.

After you hit submit, you will see this



Will appear at the top of the web page.

Using Edit / File Transactions

 Maryland Campaign Reporting Information System

MENU REMINDERS LOGOUT

Kevin Gillogly (Gillogly, Kevin People for) ?

Edit / File Pending Transactions

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

Transaction Type --Select Transaction Type--

Transaction Date Range -

Transaction Category -- Select Transaction Category --

Amount Range -

Contributor / Payee Name

☐ Receipt Not Generated ☐ Loan Consent Form Not Generated ☐ Non-Compliant Transactions

Search Cancel Clear

Transaction Date	Contributor / Payee Name	Transaction Type	Transaction Category	Amount	Address	Compliance	Edit	☐ Select All
08/15/2025	Gillogly Kevin	Contribution	Candidate Loan	\$500.00	7701 Takoma Ave, Takoma Park, MD 2091, Maryland 20912			☐

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

Generate Loan Consent Form Generate Receipt Generate Mailing Labels Preview Filing Delete Selected Delete All

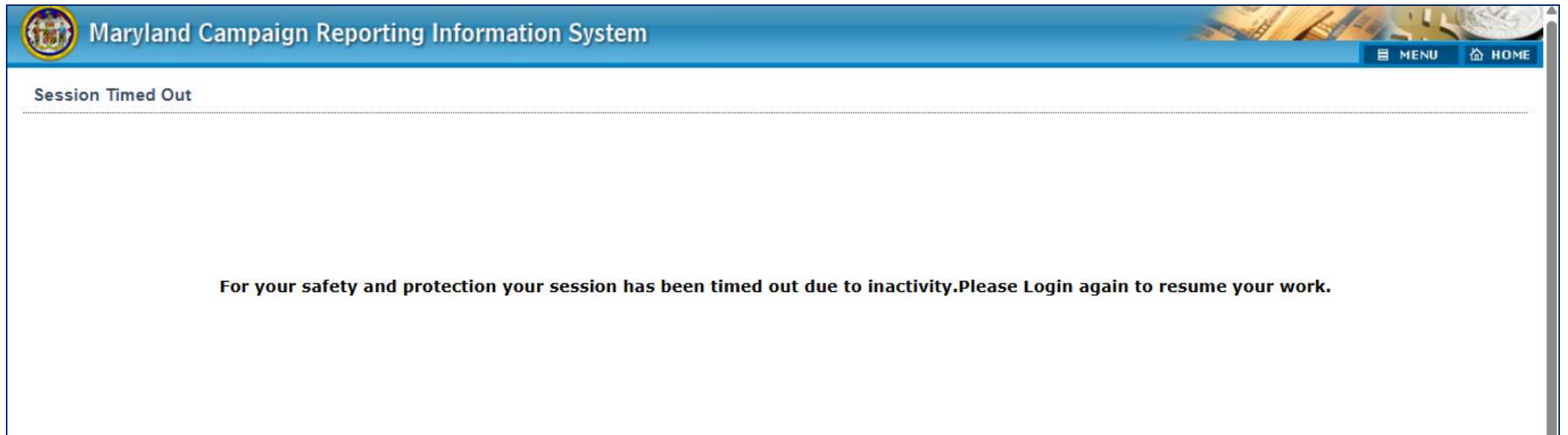
Download Contributions Uploadformat Download Expenses Uploadformat

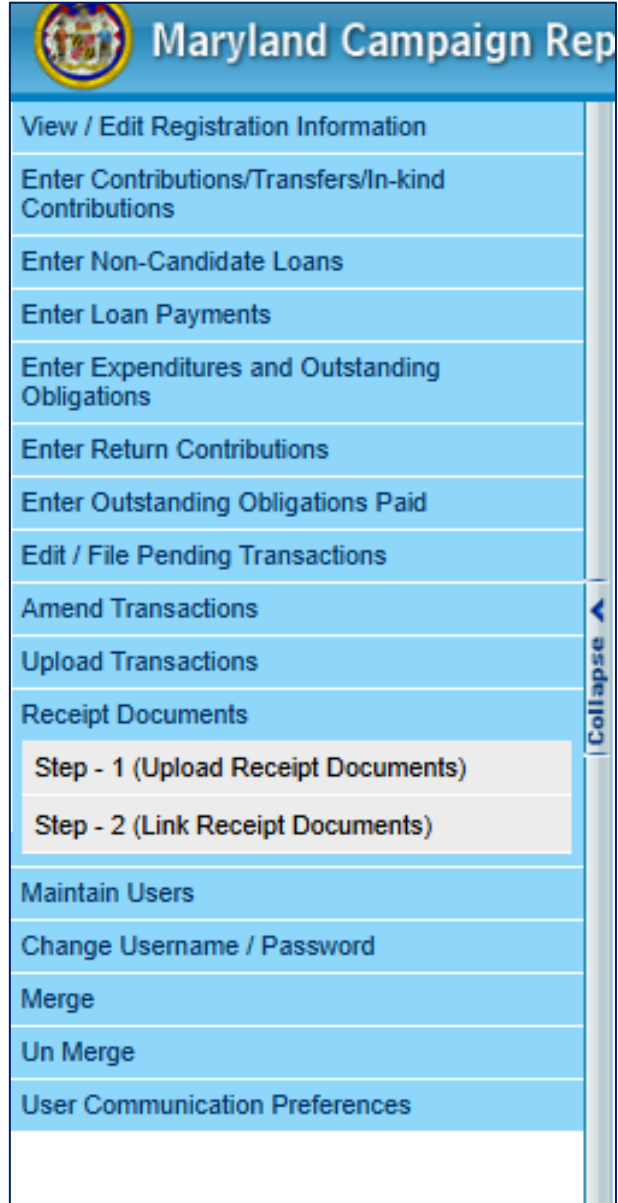
File All to State File Closeout Report

meet.google.com

Use Edit / File Transactions to double check your work.

You Might Get Timed Out





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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

Comments will not appear on filed report

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
City* Silver Spring State* Maryland County of Residence Montgomery Zip*
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

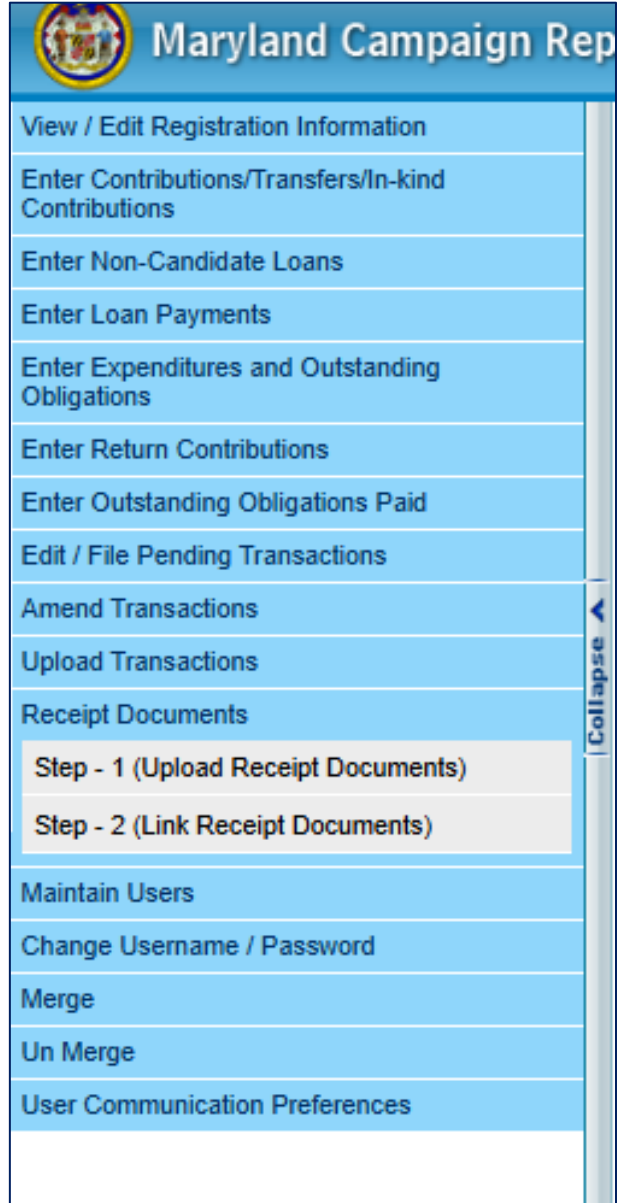
You need to record the employer and occupation for any donation of exactly \$500.00.

If you forget something

uat-legacy-mdcris.abdgh.com says

Enter Zip

OK



Menu – Your Home Base

When you get lost.
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base.

How to Enter an Expenditure

Maryland Campaign Reporting Information System

Enter Expenditures and Outstanding Obligations

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

Expenditure General Information
Filing Period: 08/15/2025 Matching Fund Report Submaterial Payee Type: Business/Group/Organization

Payee Information
Search Existing Payee
Please use a unique identifier on the search - i.e. the candidate's last name rather than "Friends of"
Search Payee Name
-or- Enter Payee Information
Business/Organization Name: PayPal
Mailing Address
Domestic(US) Overseas
Address Line 1: 185 Oak Street Address Line 2: Suite 2300
City: Baltimore State: Maryland Zip: 21202

Expenditure Details
Expense Date: 08/15/2025 Expense Category: Fund Raiser Expense Purpose: Credit Card Service Processing Charges
Expense Amount: \$15.00 Outstanding Obligation: No
Was this expense made to pay for an in-kind contribution? Yes No
Payment Method: EFT

Vendor Details (If Payee is not the Vendor)
Domestic(US) Overseas
Vendor Name
Address Line 1
City
Address Line 2
State: Maryland Zip Code

Comments

Save Clear Cancel

151 West Street, Suite 200, Annapolis MD, 21401 Phone: 410-268-2680 Fax: 410-474-2015 Email: info@stateboardofelections.gov

meet.google.com
Kevin Gillogly -SBE- (Yc

Any processing fee from a 3rd party vendor such as PayPal, Stripe, Wix etc. has to be recorded and is considered part of the donation from any contributor

Entering an Outstanding Obligation

Enter Expenditures and Outstanding Obligations Kevin Gillogly (Gillogly, 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.

Expenditure General Information
Filing Period* 08/19/2025 Matching Fund Report Gubernatorial Payee Type* Business/Group/Organization

Payee Information
Search Existing Payee
Please use a unique identifier on the search - i.e. the candidate's last name rather than "Friends of"
Search Payee Name To avoid over-contribution limits, the contributor name field must be entered identically for each contribution received from the contributor.
or, Enter Payee Information
Business/Organization Name* Joe Smoe Web Development Company

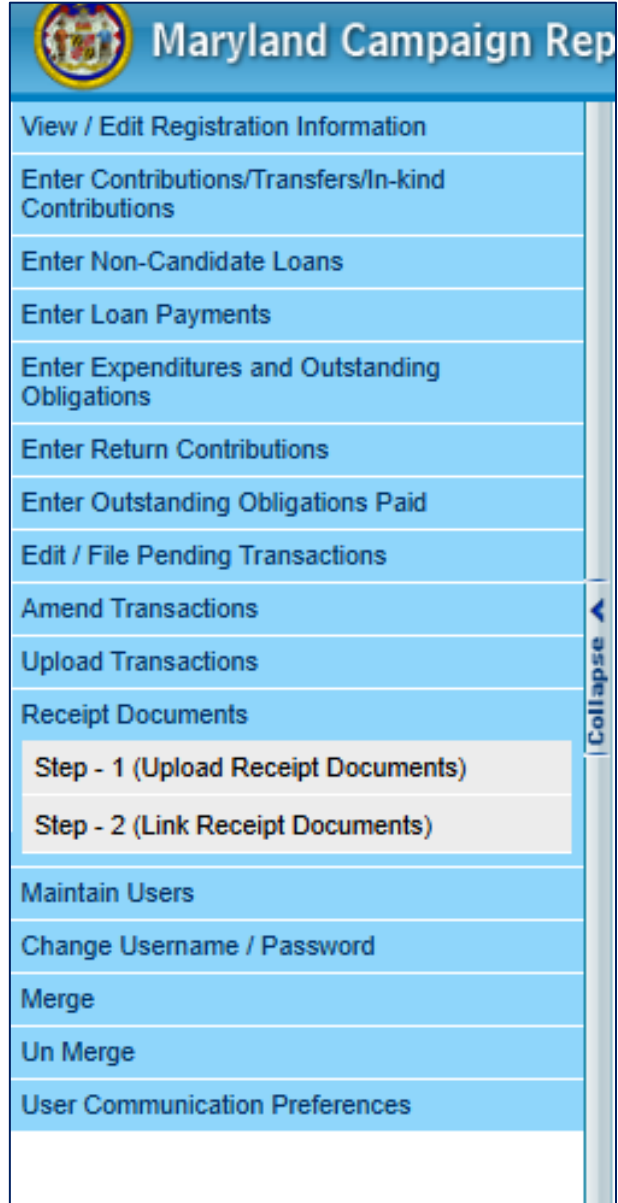
Mailing Address
☒ Domestic(US) ☐ Overseas
Address Line 1* 11125 Georgia Avenue Address Line 2 Suite 3500
City* Wheaton State* Maryland Zip* 20912

Expenditure Details
Expense Date* 08/15/2025 Expense Category* Media Expense Purpose* Media - Website Development
Expense Amount* \$3500.00 Outstanding Obligation ☒ Payment Method --Select Payment Type--
Was this expense made to pay for an in-kind contribution? ☐ Yes ☒ No

Vendor Details (If Payee is not the Vendor)
☒ Domestic(US) ☐ Overseas
Vendor Name
Address Line 1 Address Line 2
City State* Maryland Zip Code -

Comments

Here I have an outstanding obligation to pay my web developer for their work. The PF committee owes \$3,500.



Menu – Your Home Base

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Entering a Reimbursement



Maryland Campaign Reporting Information System

Enter Expenditures and Outstanding Obligations

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

Expenditure General Information
Filing Period: 08/19/2025 Matching Fund Report Submaterial Payee Type: Reimburse

Reimburse Information
Search Existing Reimburse
Please use a unique identifier on the search - i.e. the candidate's last name rather than "Friends of"
Search Reimburse Name
-or- Enter Reimburse Information
Last Name: Norfleet First Name: Allen Middle Name:
Mailing Address
Domestic(US) Overseas
Address Line 1: 123 Main Street Address Line 2: State: Maryland Zip: 20910
City: Silver Spring

Expenditure Details
Expense Date: 09/15/2025 Expense Category: Rent and Other Office Expenses Expense Purpose: Office Supplies
Expense Amount: \$200.78 Outstanding Obligation: Payment Method: Check Check Number: 101
Was this expense made to pay for an in-kind contribution? Yes No

Vendor Name: Wal-Mart Address Line 1: 555 Sleepy Hollow Drive Address Line 2: State: Maryland Zip Code: 20904
City: Silver Spring

Comments
Reimbursement for office supplies

Save Clear Cancel

151 West Street, Suite 200, Annapolis MD, 21401 Phone: 410-269-2680 Fax: 410-476-2019 Email: cef.ste@maryland.gov

Very common. Someone goes out and pays for an expense and looks for reimbursement later.

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

**Maryland Campaign Reporting Information System**

MENUREMINDERSLOGOUT

Kevin Gillogly (Gillogly, Kevin People for) ?

Upload Transactions

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 Name08/19/2025 Matching Fund Report GubernatorialTransaction Type--- Select Type ---Select a FileChoose FileNo file chosen

UploadClearCheck 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](#)

Correct for Errors

- You might have errors in your data. Go through and manually edit the transactions that have faulty data.

Questions

Future Lunch and Learns

- Linking Receipts with a donor or an expense
- Submitting your first initial matching fund report
- Trouble shooting common problems

Staff Directory

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