eReturns Guide for Referendum Entities

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Contents

Common icons and useful information

Common icons

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

Useful information

Saving

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

Required information and fields

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

Creating an eReturns account
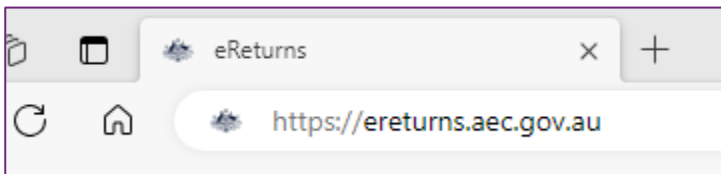
Accessing eReturns

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

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

Getting started

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

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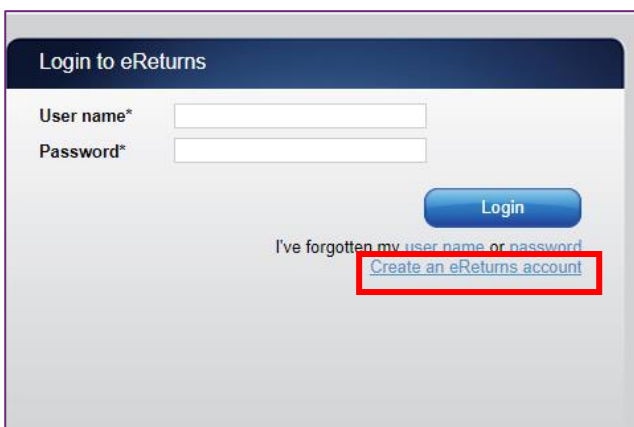
Create an eReturns account

The first screen requires you to select the type of return you need to complete. Select 'Referendum entity or donor'. The next screen you will be able to select 'Referendum entity'.

Step 1: Start

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

Select 'Referendum entity' from the eReturn account types:

Use the 'Next' button to provide information on the referendum entity and update the lodging officer details.

Step 2: Organisation details

On this screen you can provide relevant information regarding the referendum entity.

Please ensure your email address is correct as eReturns uses email for validation and to send you copies of any returns which you lodge.

Once you have completed all required fields, click 'Next' to move to the 'Your details' screen.

Step 3: Account details

On this screen you need to provide details for the contact person responsible for the referendum entity, or lodging officer. Some details, such as the address will be pre-filled based on the previous screen.

Please ensure your email address is correct as eReturns uses email for validation and to send you copies of any returns which you lodge.
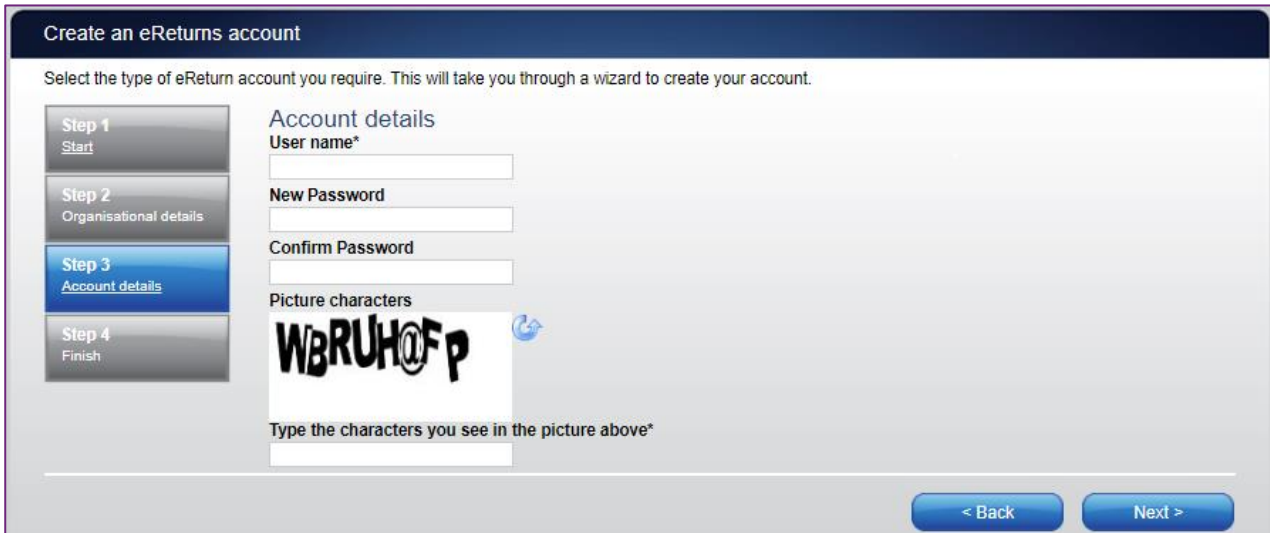

Please note: The address provided here will be made publicly available once the submitted return is published on the Transparency Register.

After you have completed the 'Your details' screen, click 'Next'.

Step 3: Account Details

On this screen you will need to set a user name and password.

If you have received your eReturns credentials via an obligation letter please go to page 11 for information on how to setup your account.


For the security of your eReturn account, please follow these instructions to create a password:

Length: Your password must be a minimum of 8 characters
Composition: Use a combination of uppercase and lowercase letters, numbers and avoid special symbols

Note your new password, as you will need this to lodge a return. Once you have completed the Account details screen, click 'Next'.

Step 4: Confirmation
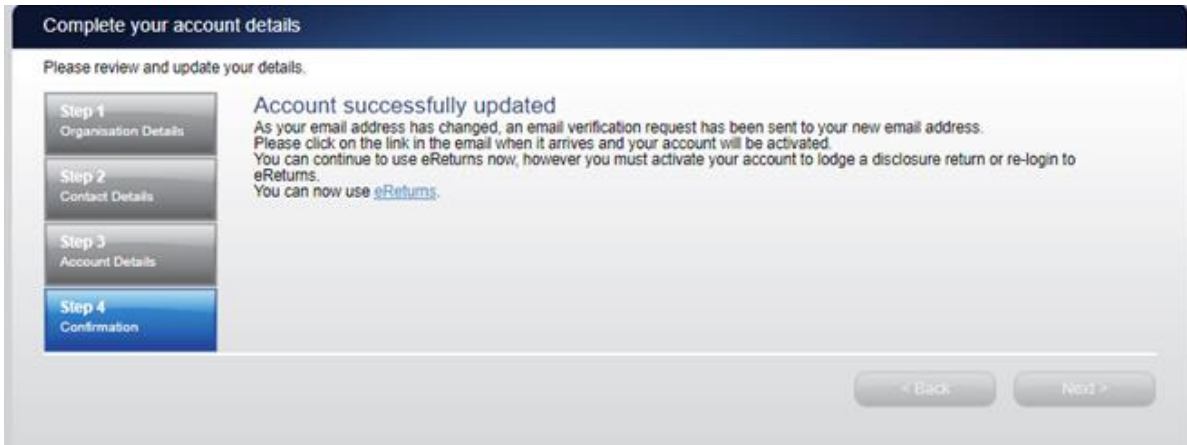
Please note: the 'Confirmation' step above, details that your 'email address has changed', this is simply directing you to the verification email to 'Activate' your account.

Email activation and verification

eReturns will automatically generate an activation email and send it to your email address so you can verify the email associated with the account.
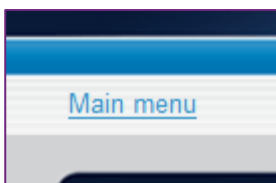
Your eReturns account **needs to be activated** by using the link emailed to you. The below is an example of the email content.

Clicking this link verifies that you have access to the email account.
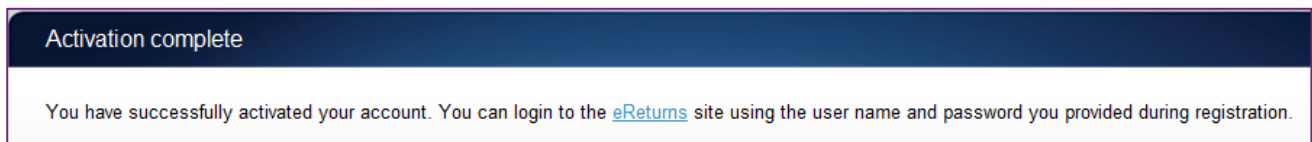
Once you have verified your email address you are able to start using your eReturns account, please click the 'Main menu' button to return to the eReturns main menu.

Using AEC issued credentials to access eReturns

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

The AEC may issue you with eReturns credentials. eReturns credentials will look like this:

User name:	AdminReferendumEntity
Password:	P2U22A2P

eReturns credentials are made up of a user name and one-time password. On the first log-in to eReturns you will need to confirm and update details.

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

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

Using eReturns

Main menu

Once you have logged in you will see the eReturns main menu.
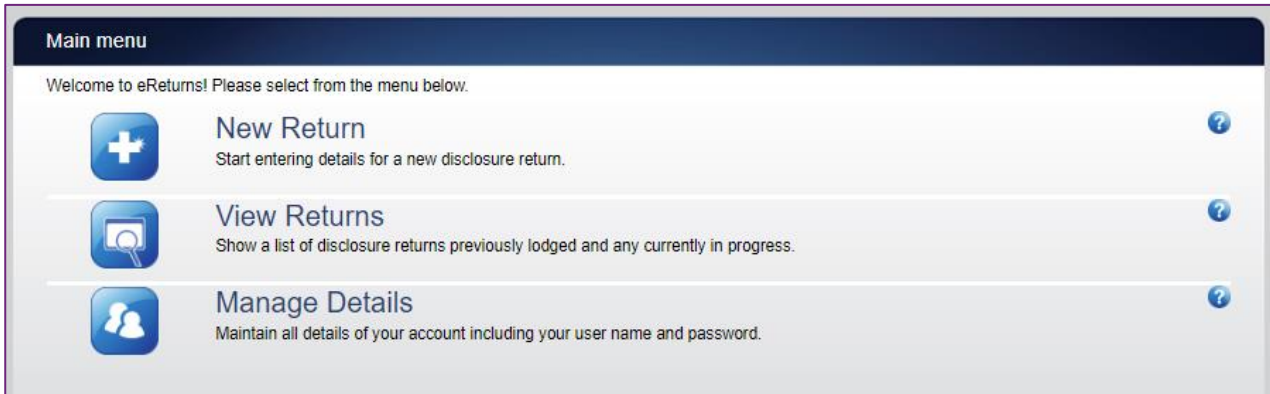
From the main menu you can start a **new return**. The next sections in the guide explain a new return for referendum entities.

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

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

NOTE: Your account details are the details that you reviewed and updated when you logged in for the first time.

Completing a return

To complete a Referendum Entity return for the 2023 Referendum use the 'New Return' button on the main menu.

New return

Click the 'New Return' button to start completing a new return.
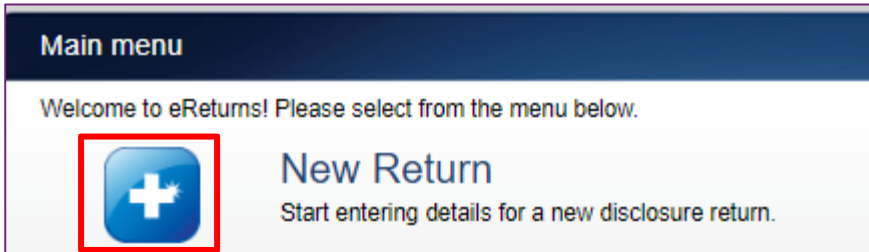
You will then need to choose the referendum entity return for the relevant referendum year:
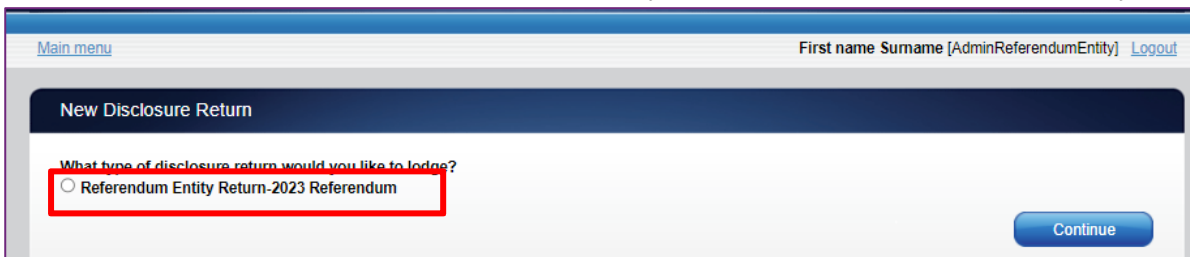
Click 'Continue' to launch the return wizard. You can use the 'Back' and 'Next' buttons to navigate through the screens.

Instructions on how to complete the wizard will appear at the top of each screen.
Progress through the wizard is tracked down the left-hand side.
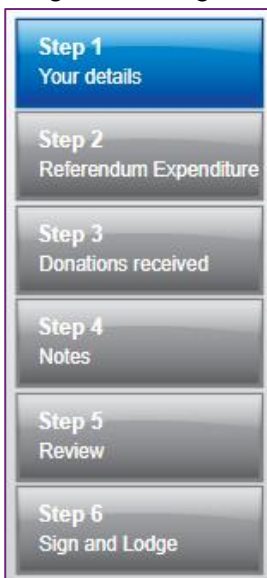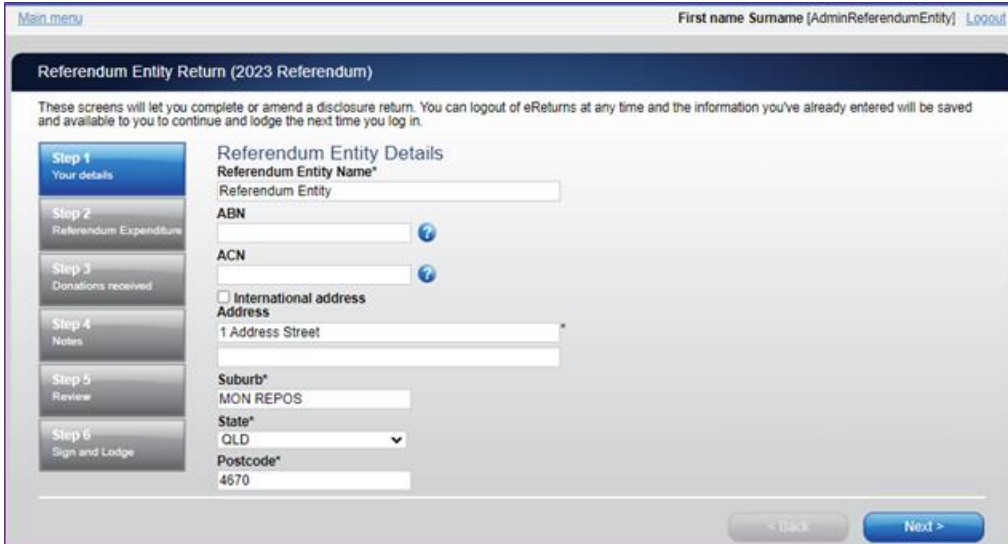
As you navigate through the wizard, you will be prompted to enter the information which will make up the return.

Step 1 – Your details

On this screen you can update the Referendum Entity details.

NOTE: These details have been automatically pre-filled from the information you provided in your account registration.
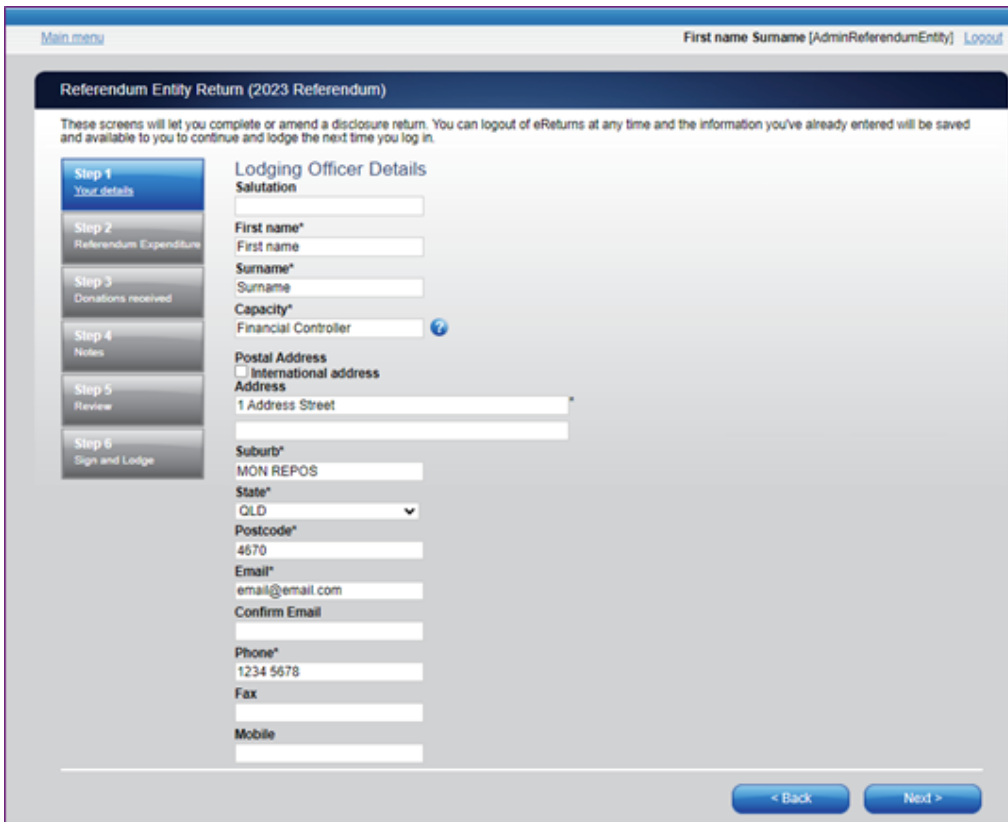
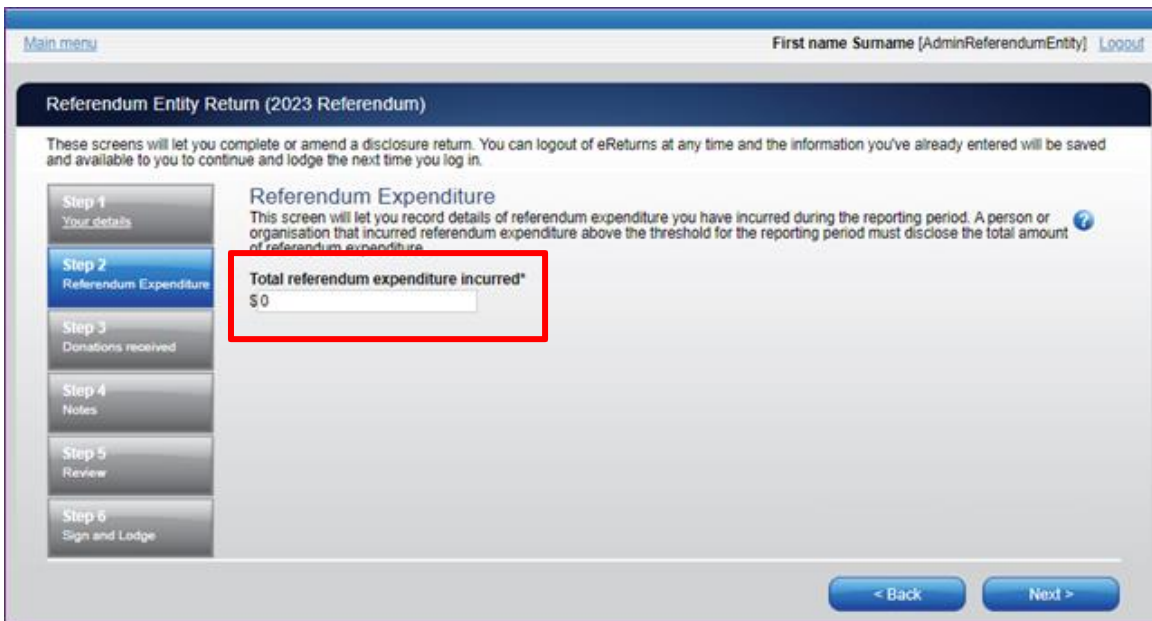Once you have reviewed or updated the entity's details click 'Next' to move to the Lodging Officer details screen.

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

Step 2 – Referendum expenditure
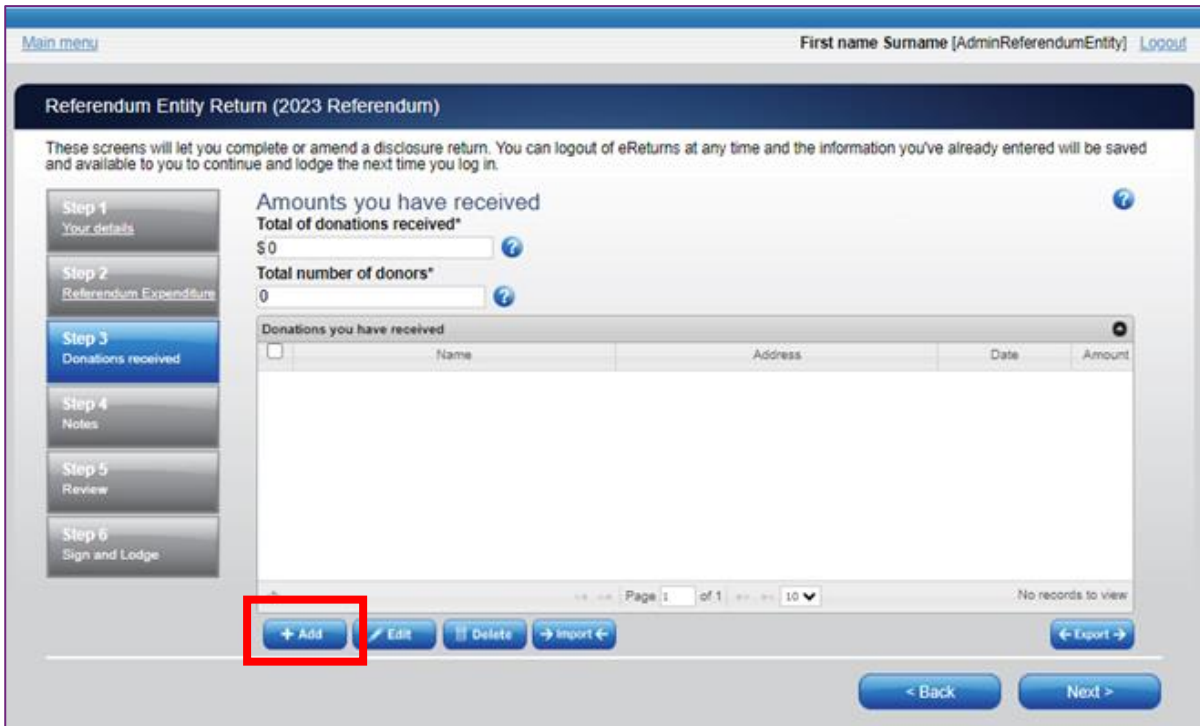
This screen requires you to provide a whole dollar amount for referendum expenditure incurred:

Click Next to progress Donations received.

Step 3 – Donations received

Total donations and number of donors can be recorded directly into this screen. To add donation details click the 'Add' button at the bottom of the table on the screen. That will launch the 'Add a donation received' window.

In the 'Add a donation received' window you can fill in the details of each detailed donation. All required fields must be completed. Once all the information has been entered click the 'Add' button to add the receipt to the list. The 'Add a donation received' window will remain open to allow you to enter more receipts. Once you have finished entering receipts click the 'Close' button to return to the receipts screen.

Import donations

The import function allows you to upload a spread sheet of transactions into eReturns, eliminating the need to manually enter each transaction. In order to import receipts you will need a spread sheet (either in MicroSoft Excel, CSV or XML format) of receipts which contains all of the required information for each receipt. To start importing receipts click the 'Import' button.
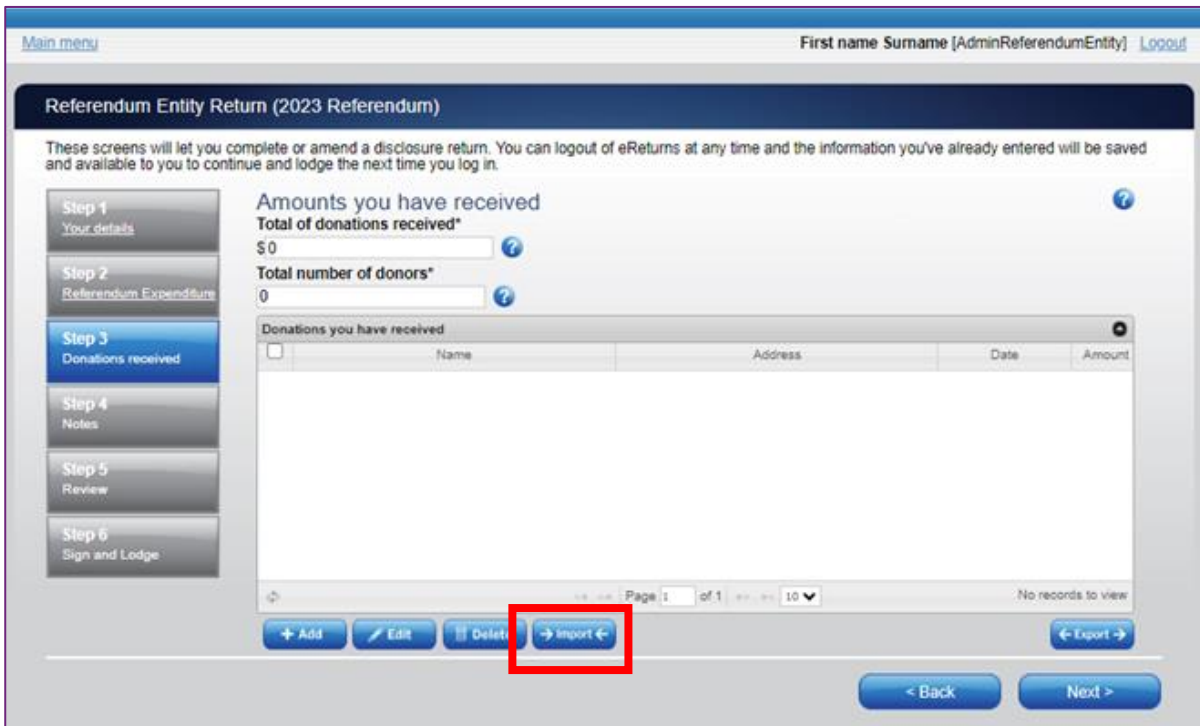
This will launch the import screen.
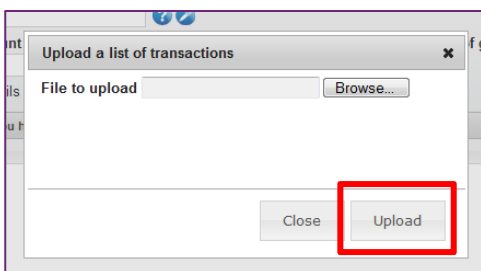
From here you can use the browse button to select the spread sheet you wish to upload from your computer. Once you have selected the spread sheet, click 'Upload'.

Once eReturns has uploaded your spread sheet it will ask you to match the columns in your spread sheet to the columns in eReturns. For example:

Now eReturns will ask you to designate some of the values in some of the columns. You will need to assign values that eReturns recognises to some of the data in your spread sheet. Once you have assigned all the columns, click 'Import Data'.

Once you have matched the values from your spread sheet to values that eReturns will recognise you can click 'Assign'. eReturns will tell you how many records were successfully imported, and list those which were not successful. You can also export the list of transactions which were not successfully imported from here. To close this window, click 'Close'.

If you choose to export the list of transactions which were not successfully imported you can fix the problems in the data which eReturns has identified and re-import that list. Alternatively, you can use the '+ Add' button to add those transactions manually.

eReturns will now upload the transactions from the spread sheet into the return wizard. Once it is complete you will be able to see the transactions in the list on the screen.
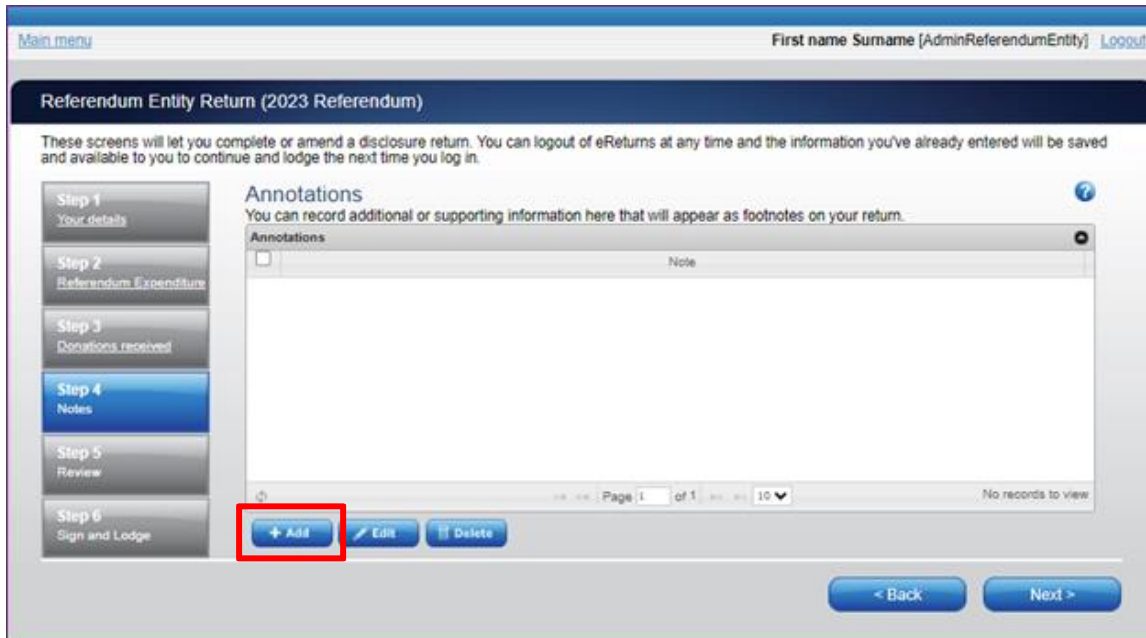
Once you have recorded all donations above the threshold, click 'Next' to move to the Notes screen.
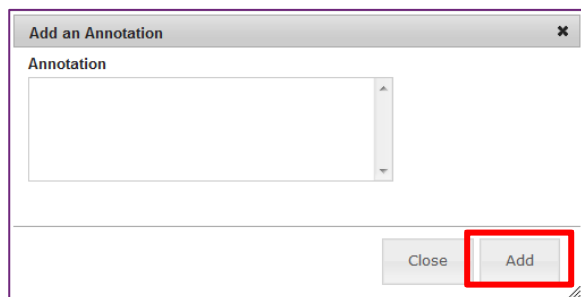
Step 4 – Notes

The Notes screen allows you to record annotations against the return. Please note that the annotation will be made publicly available once the submitted return is published on the Transparency Register.

The annotations will be presented on the return as footnotes.

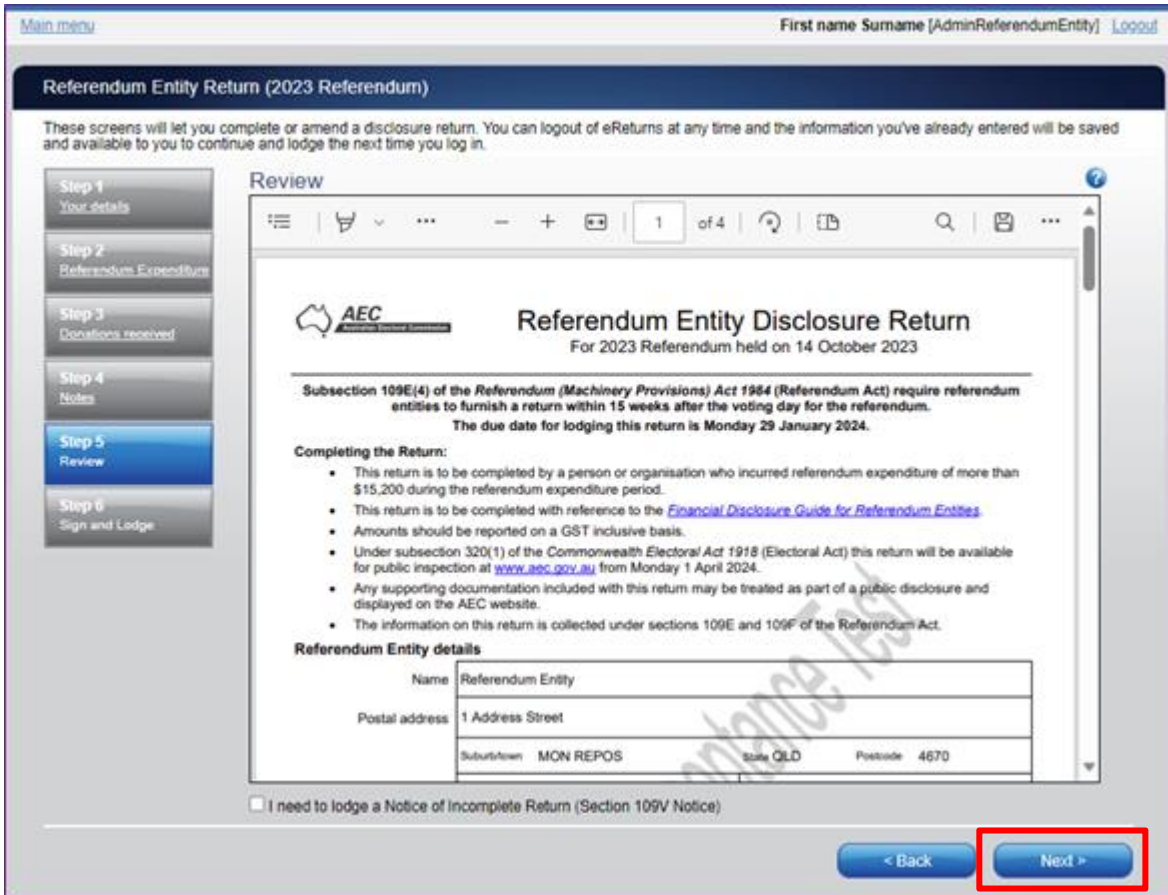To add an annotation, click the 'Add' button. This will launch the 'Add an Annotation' window.

Enter the text of your annotation and click 'Add' to save it. Click 'Close' once you have entered all your annotations. When you have finished recording annotations, click 'Next'.

Step 5 – Review

From this screen, you may view the draft return.

Here you will be presented with a PDF preview of what the data in your return will look like. Use the scroll bar on the right of the screen to view all of the pages of the return.
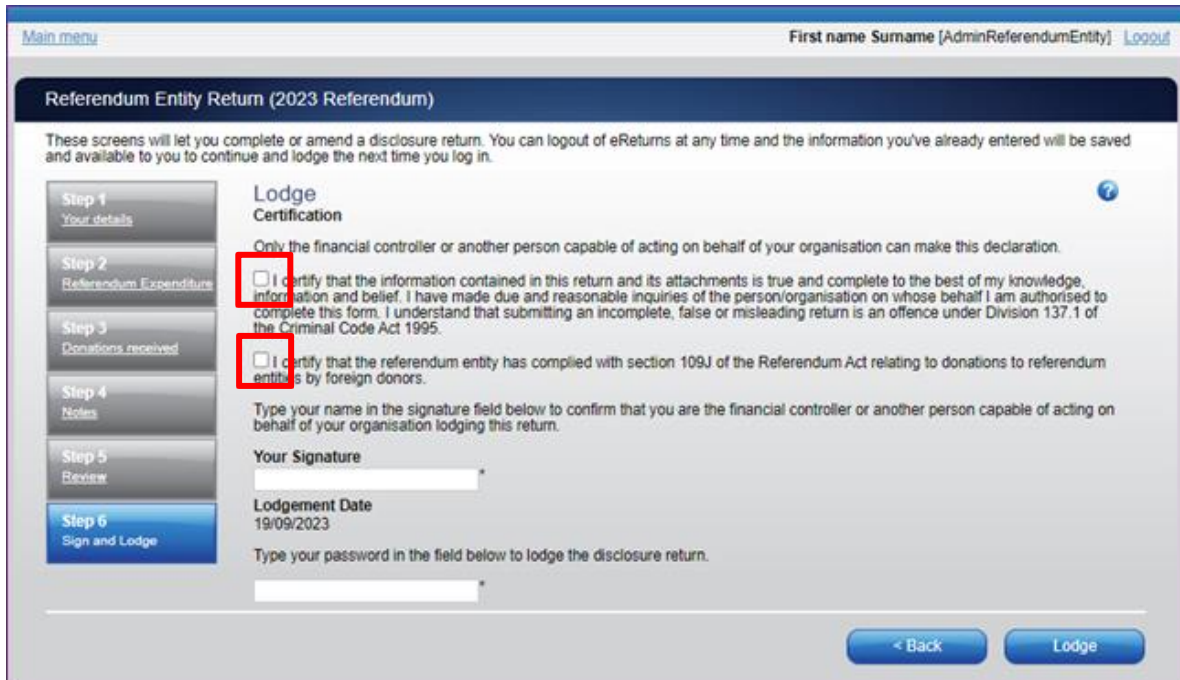

You'll notice that there is nothing in the signature or date fields on the front of the return. These fields will only be populated once you have completed the lodgement screen and will appear on the final version of your return.

If you need to make changes to the data in the return, click 'Back'. Once you have reviewed the image of your return and all data is correct, click 'Next'. This will take you to Step 6, the 'Sign and Lodge' screen.

NOTE: At the bottom of this screen, above the 'Back' and 'Next' buttons is a checkbox. Selecting this box will allow you to lodge a Notice of Incomplete Return. For more detail on this, go to the Lodging a Notice of Incomplete Return section of this guide.

Step 6 – Sign and Lodge

The final step to lodging the return is to certify that the information is correct and to electronically sign. If you are sure that the information contained within the returns is correct, click **both** check boxes. You will then need to type your name in the following box to act as an electronic signature.

Finally, type your password into the final box. This step is to verify that the candidate agent is lodging the return. Once you have completed these steps, click the 'Lodge' button and the return will be submitted.

From this screen you may save a PDF copy of your return. The AEC recommends that you save a copy of your return in case you need to print or refer to it later. The unique reference number
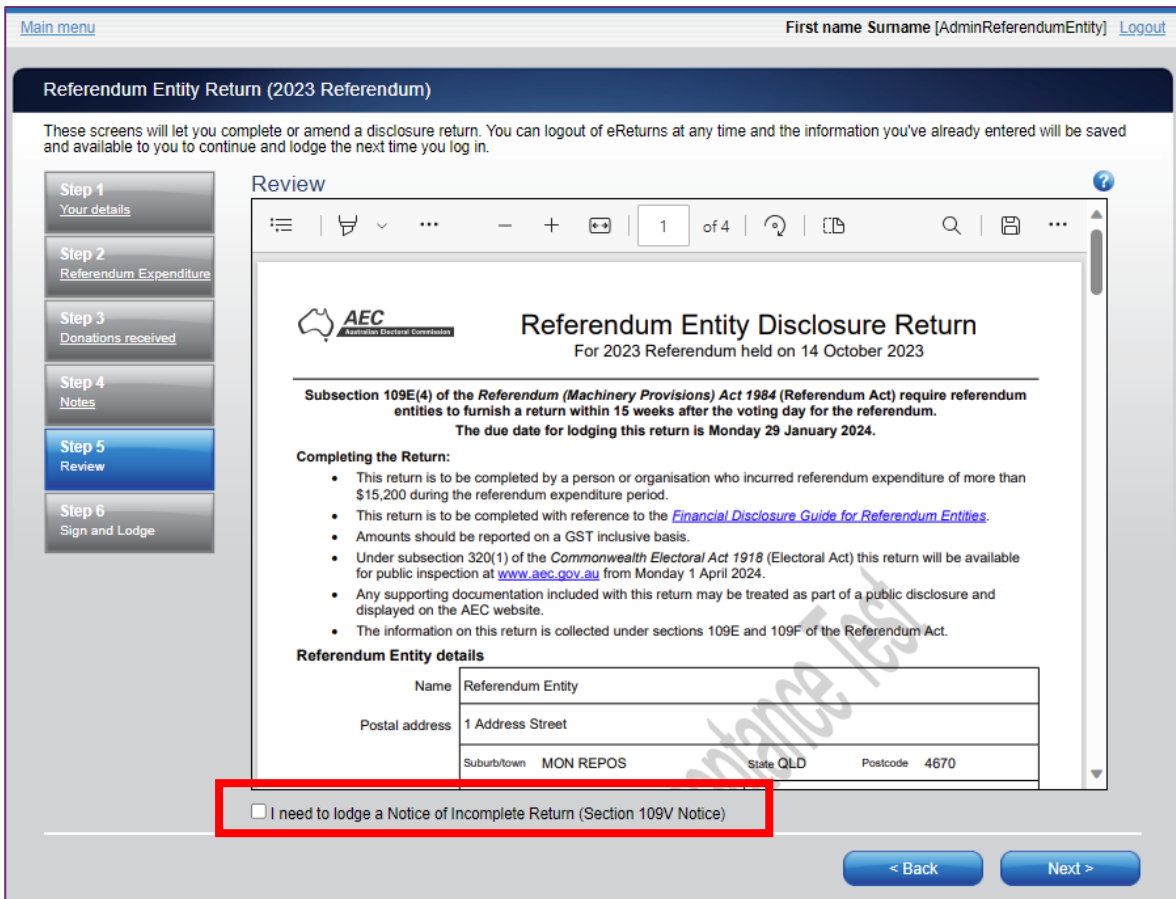
presented on this screen is also recorded on the return form in the bottom right hand corner. eReturns will also email you a copy of your lodged return by default.

Use the 'Main Menu' button in the top left corner to return to the Main Menu.

Lodging a Notice of Incomplete Return

eReturns will allow you to lodge a Notice of Incomplete Return online. For more information about when it is appropriate to lodge a Notice of Incomplete Return please consult the *Financial Disclosure guide for Referendum Entities* available on the AEC's website at www.aec.gov.au.

To lodge a Notice of Incomplete Return in eReturns you will need to select the checkbox at the bottom of the "Step 5 – Review" screen.

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

You are required to fill in all fields, detailing the information that is missing from your return, the reason why you were unable to obtain that information, who you believe may have the information which is missing, and why you believe that person has it. Once you have completed all the fields on the screen, click 'Next' to review the Notice of Incomplete Return.

Once you have reviewed your Notice of Incomplete Return click 'Next' to go to the Sign and Lodge screen. To lodge your return and Notice of Incomplete Return follow the instructions at Step 7 – Sign and Lodge of this guide.

Amending a Return

If you need to amend your return, log into eReturns and Click on "View" returns.
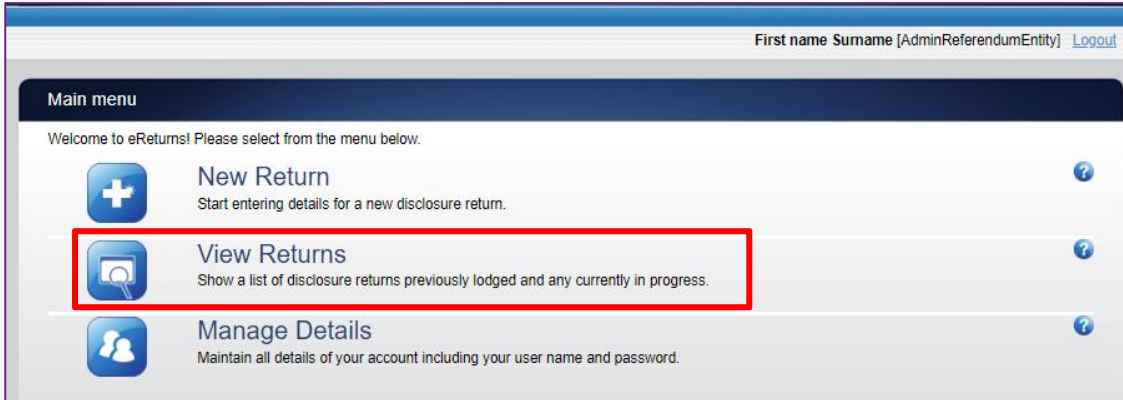
A return can only be amended once it has been processed by the AEC. If you cannot see the option to 'Amend', please contact Disclosure & Compliance on 02 6271 4552 or by email at fad@aec.gov.au.

This will launch the amendment wizard. The amendment wizard is the same as the return wizard, except it contains the data from the ori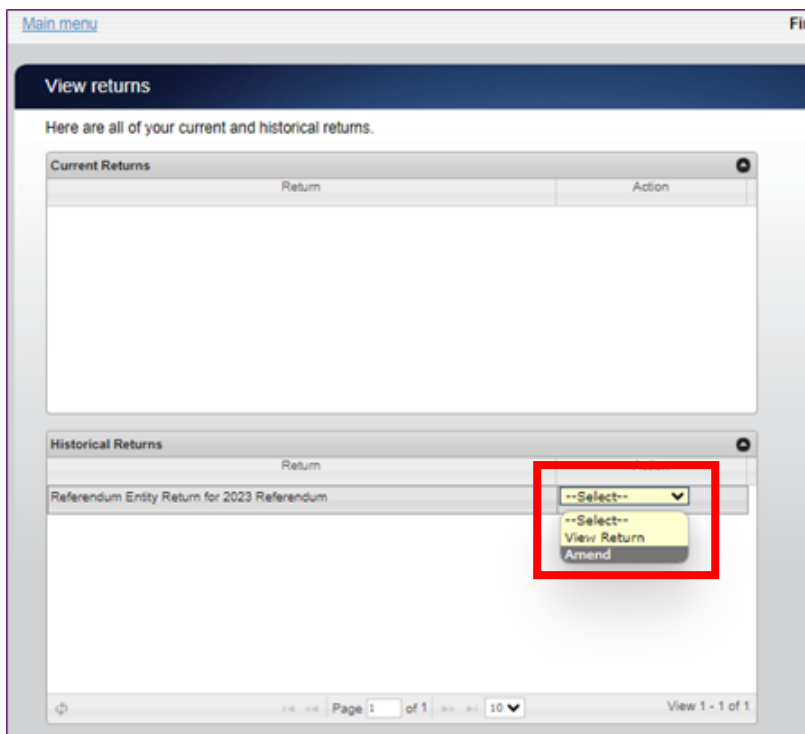ginal return. To amend a return, simply add, edit, or delete as appropriate. Once you have finished working your way through the wizard, eReturns will generate an amendment form for you to review. This amendment form can be lodged in the same way as the original return.
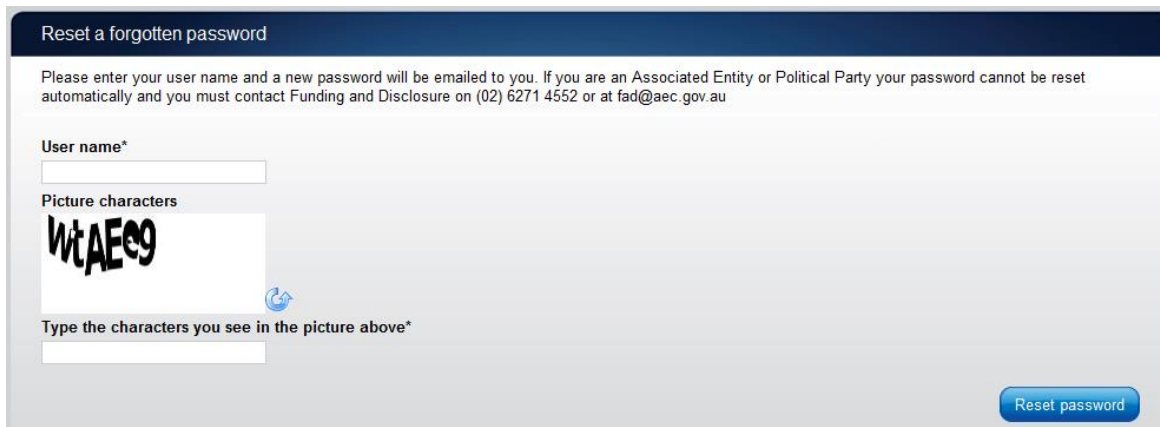
Troubleshooting

Forgotten Password

If you have forgotten your password, you can reset it online. This can be done using the forgotten password link on the eReturns front page. eReturns will send you an email with a new single use password in it.
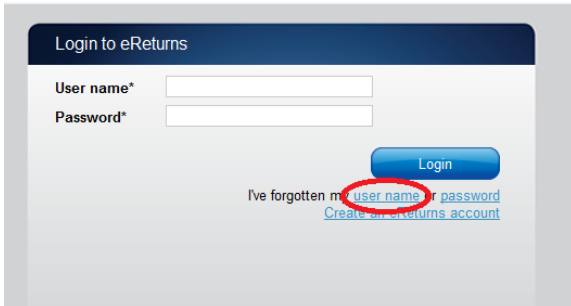

Clicking forgotten password will take you to the password reset screen where you will need to enter your user name the 'Picture characters' text on screen.
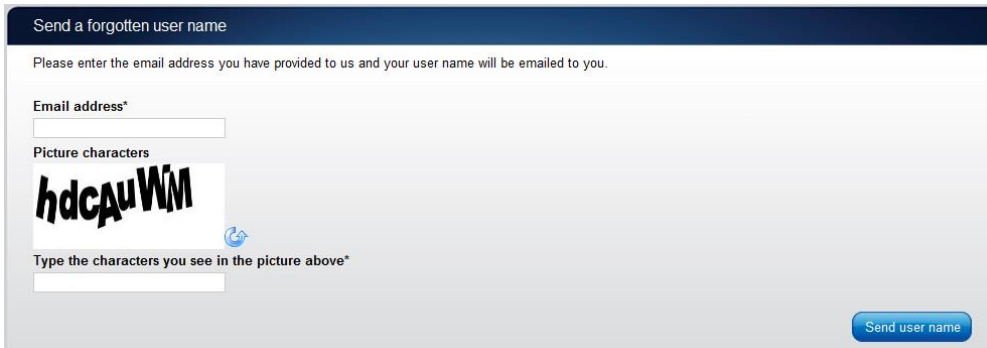

Alternatively, you can contact the Disclosure team on 02 6271 4552 or email at fad@aec.gov.au.

Forgotten User name

If you have forgotten your user name, you can retrieve it online. This can be done using the forgotten user name link of the eReturns front page. eReturns will send you an email containing your user name.

Clicking forgotten user name will take you to the user name retrieval screen where you will need to enter your email address and the CAPTCHA text on screen.

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

Other problems

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