

INSTRUCTIONS TO COMPLETE AND SUBMIT SCHEDULE 5 ELECTRONICALLY

LENDER COMPLETES THE FOLLOWING STEPS

1. Visit <https://rockvillemd.gov/elections> then click the link “Running for Office.” Scroll down to Section 2 Candidate Information Election Packet, click the link for “Schedule 5: Report on Loan to Campaign Committee”. Clicking the link will open DocuSign.



Candidate Information Election Packet

[Download our complete candidate packet](#) or pick up a hardcopy at the City Clerk's Office in City Hall, Monday-Friday from 8:30 a.m.-5 p.m.

We now offer a selection of required Section 5 documents to be completed online.

- [Campaign Finance Report Fillable Excel Spreadsheet](#)
- [Signed Affidavit](#)
- [Schedule 5: Report on Loan to Campaign Committee](#)

2. Once DocuSign opens, the lender completes the name and email fields, then clicks the **Begin Signing** button (Refer to screen shot below).

Note: The lender is the first person to complete his/her section and sign Schedule 5. Once completed, an email along with Schedule 5 as an attachment will be generated for the Candidate for completion of his/her section and signature

City of Rockville

Enter the names and emails for the lender and candidate. Signers will each receive an email.

Please enter your name and email to begin the signing process.

Your Role:

Lender *

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Your Role:

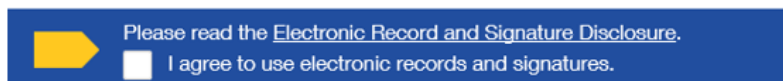
Candidate *

Your Name:

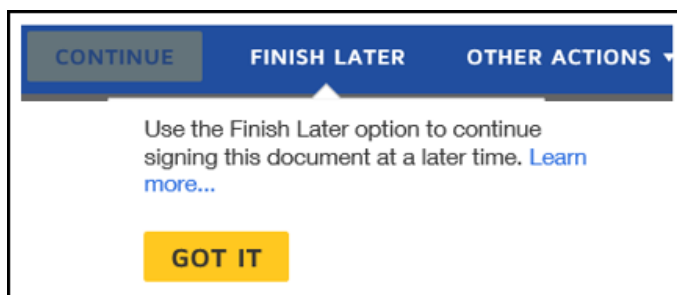
Your Email:

Begin Signing

3. If prompted, read the Electronic Record and Signature Disclosure then click the check box to indicate you have read and agree to use the electronic records and signatures.



4. Click **CONTINUE**.
5. If you choose to complete and sign Schedule 5 later, you can ignore the message box shown below if it is displayed.



6. Click **START**.
7. The cursor will automatically move to Section 2: Terms of Loan. This section is to be completed by the lender.
8. Click **NEXT** and enter the Name of Lender.
9. Click **NEXT** and enter the Address of Lender.
10. Click **NEXT** and click Yes or No to answer the question “Are the terms of the loan stated in writing?”
11. Click **NEXT** and enter the Schedule for Repayment.
12. Click **NEXT** and enter the Interest Rate.
13. Click **SIGN**. If this is the first time you are using DocuSign, an example of your signature will be displayed. You may change the style by clicking the Change Style button on the right side of the box or draw your signature by clicking the Draw button.
Note: This version of DocuSign does NOT allow for inserting an image file of your actual signature.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*

Sally B. Jones

Initials*

SBJ

[SELECT STYLE](#)

[DRAW](#)

PREVIEW

[Change Style](#)

Sally B. Jones SBJ

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN

CANCEL

14. Once you have chosen or drawn your signature, click **ADOPT AND SIGN**. The date field will be automatically populated.
15. Click **FINISH**.
16. Close the browser.

The completed and signed version of Schedule 5 then routes via email to the Candidate. The Lender will also receive an email from **City of Rockville via DocuSign**.

CANDIDATE COMPLETES THE FOLLOWING STEPS

1. The candidate opens their email and locates the email from **City of Rockville via DocuSign**. At this point, the Candidate clicks the **REVIEW DOCUMENT** button to launch DocuSign and open Schedule 5.



2. If prompted, read the Electronic Record and Signature Disclosure agreement then click the check box to indicate you have read and agree to the use of electronic records and signatures.

 Please read the [Electronic Record and Signature Disclosure](#).
☐ I agree to use electronic records and signatures.

3. Click **CONTINUE**.
4. Click **START**. The cursor will be in the Reporting Period field. Click the drop-down arrow and select the reporting period from the drop-down box.
- 5.



REPORTING PERIOD: -- select -- Amended Report: -- select --

SCHEDULE 5: REPORT ON LOAN TO CAMPAIGN COMMITTEE

Name of Campaign Committee:

This schedule must be attached to the Campaign Finance Report for the reporting period in which the loan was received. A copy should also be provided to the lender. A separate schedule must be completed for each loan received. This schedule must be prepared only if written consent is required and has not previously been filed.

6. Click **CHOOSE** to move to the Amended Report field. Click the drop-down arrow and select either Yes or No.
7. Click **NEXT** and enter the Name of the Campaign Committee.
8. Click **NEXT** and enter the Name of Candidate.

9. Click **NEXT** and enter the Date the Loan was Received.
Note: Date format is MM/DD/YYYY
10. Click **NEXT** and enter the Amount of the Loan.
Note: Decimal places are allowed; Commas are NOT allowed
11. Click **NEXT** and enter the name of payee.
12. Click **NEXT** and enter the name of person/company who provided the loan.
13. Click **NEXT**.
14. Click **SIGN**. If this is the first time you are using DocuSign, an example of your signature will be displayed. You may change the style by clicking the Change Style button on the left side of the box or draw your signature by clicking the Draw button.
Note: This version of DocuSign does not allow for inserting an image file of your actual signature.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*	Initials*
Frank B. Poland	FBP

SELECT STYLE **DRAW**

PREVIEW **Change Style**

DocuSigned by:

Frank B. Poland

821CD7D7D544491...

DS

FBP

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

- 15.
16. Once you have chosen or drawn your signature, click **ADOPT AND SIGN**. The date field will be automatically populated.
17. Click **FINISH**.
18. The following message box will be displayed. You may want to download or print a copy of the completed and signed Schedule 5. Or, you can click **CLOSE**, and either print or use SAVE AS from your email program if you want to retain a hard copy of the document.

Save a Copy of Your Document



Your document has been signed

If you would like a copy for your records, select Download or Print and save.

DOWNLOAD

PRINT

CLOSE

19. Click **CONTINUE**.
20. Close the browser.
21. The completed Schedule 5 is then emailed as an attachment to the candidate, treasurer and to campaignfinancereport@rockvillemd.gov.
22. The screen shot below shows how the email with the attachment will appear in your email inbox.

Completed: Please DocuSign: Schedule 5 -- Report on Loan

To

 If there are problems with how this message is displayed, click here to view it in a web browser.



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

City of Rockville

DoNotReply@rockvillemd.gov

All parties have completed Please DocuSign: Schedule 5 -- Report on Loan.

A sample of a completed and signed Schedule 5 is shown below.

REPORTING PERIOD: Initial Pre-Election Report (05/01/19 through 09/30/2019)

Amended Report: No

SCHEDULE 5: REPORT ON LOAN TO CAMPAIGN COMMITTEE

Name of Campaign Committee: Friends of Frank B. Poland

This schedule must be attached to the Campaign Finance Report for the reporting period in which the loan was received. A copy should also be provided to the lender. A separate schedule must be completed for each loan received. This schedule must be prepared only if written consent is required and has not previously been filed.

SECTION 1. CONSENT OF RECIPIENT

Please Print

Name of Candidate:

Frank B. Poland

Date Loan Received:

5/5/2019

Amount of Loan:

\$ 3000

Payable To:

Friends of Frank B. Poland

Received From:

Sally B. Jones

A copy of this consent has been supplied to the lender.

Frank B. Poland

6/18/2019

(Signature of Candidate)

(Date)

SECTION 2. TERMS OF LOAN

Please Print

Name of Lender:

Sally B. Jones

Address of Lender:

456 Barton Creek Parkway, Rockville, MD 20852

Are the terms of the loan stated in writing: ☒ Yes ☐ No

Schedule for repayment:

Monthly payments of \$100 due on the 19th of each month.

Interest Rate: 3.25 %

Sally B. Jones

6/18/2019

(Signature of Lender)

(Date)