The
Electoral
Commission

Situations and procedures – GB and NI

PEF Online - getting started

This document is for political parties, non-party campaigners and registered campaigners (in a referendum) who want to use PEF Online to register and report their donations and spending

Contents:

Translations and other formats

For information on obtaining this publication in another language or in a large-print or Braille version please contact the Electoral Commission:

Tel: 020 7271 0500
Email: publications@electoralcommission.org.uk

Terms and expressions we use

You will normally be doing enough to comply with the law if you follow this guidance.

We use 'must' when we refer to a specific requirement. We use 'should' for items we consider to be minimum good practice, but which are not legal or regulatory requirements.

Our approach to enforcement

The Commission regulates political funding and spending. We are committed to providing those we regulate with a clear understanding of their regulatory obligations through our guidance documents and advice service.

Wherever possible, we use advice and guidance proactively in order to secure compliance. And we regulate in a way that is effective, proportionate and fair.

If you do not comply with legal or regulatory requirements you or your organisation may be subject to civil or criminal sanctions. You can find more information about the Commission's approach to enforcement at www.electoralcommission.org.uk/party-finance/enforcement

PEF Online - getting started

Who this document is for:

Political parties, non-party campaigners and registered campaigners in a referendum who want to use PEF Online to:

- register with us
- maintain or renew their registration
- submit donations and loans reports
- submit a statement of accounts or
- submit campaign spending returns

The document covers:

- an introduction to PEF Online
- working with PEF Online
- getting started if you are already registered
- getting started if you are registering a new party or as a campaigner
- managing your user accounts

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Summary

If you are setting up a political party or intending to campaign in elections or referendums you may need to register with us.

PEF Online is our secure database where you can complete registrations and maintain your registered details.

PEF Online also allows you to submit statutory donations and loans reports, statement of accounts and campaign spending returns electronically. You must have a user account to do this.

Introduction

Under the Political Parties Elections and Referendums Act 2000 (PPERA) we regulate party and election finance. This includes:

- registering political parties and maintaining the register of political parties in Great Britain and Northern Ireland
- registering non-party campaigners
- registering campaigners in referendums
- publishing details of where political parties and campaigners get money from and how they spend it

PEF Online is our secure database of registers for recording and publishing this information.

Benefits of using PEF Online

Once your user account is set up you can access and amend your registered details. You can also compile and submit statutory returns electronically.

If you use PEF Online, you will work directly with the database. This means that you can create spending returns and update them on a regular basis before submitting them. You can retrieve and update your existing information in the system. For example, it is possible to maintain a list of donors or suppliers and recall their details so you do not need to re-enter this information to complete a new donations return.

For information on registering a political party or as a campaigner see:

- Introduction to registering a political party
- Introduction for non-party campaigners
- Introduction to referendum campaigning

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Working with PEF Online

Who should be your administrator?

The system recognises four different types of user with different levels of access. It is important for you to consider who you want to be your PEF Online Administrator before you apply to use PEF Online because they will be the 'super-user' who can carry out all the functions.

You can choose one of the registered officials in your organisation e.g. the party treasurer of a political party, or the responsible person of a non-party campaigner to be your online administrator. But you do not have to choose a registered official as your administrator.

Who else can use PEF Online?

User

This is a general category. Users can:

- view registered details
- prepare but not submit statutory returns

Party officer

This category should be used for people who hold an official role within the party. For example, the leader, the nominating officer, party treasurer or campaigns officer.

The administrator can assign specific roles to individuals in this category so that their access within the system corresponds with their role within the party.

Where authorisation is required for certain changes, this can only be completed online by the relevant party officer. If this officer does not use PEF Online you will have to print and sign a paper copy of the application or return.

Accounting unit officer (political parties only)

This user type is for use by an accounting unit treasurer or second officer. They have limited access to the party

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🔔 **Important**

The administrator is the '**super-user**' who can carry out all of the functions in the system. They:

- Administer the other users
- Reset passwords
- Submit statutory returns (only the relevant party officer can authorise online)
- Amend the organisation's details

For more information on the roles of registered officers see:

- Introduction to registering a political party
- Overview of non-party campaigns
- Overview of referendum campaigns

information within the system but it allows them to prepare and submit the statutory information for their accounting unit.

Non-party campaigner - responsible person

This category should be used for people who hold the role of 'responsible person'.

All registered non-party campaigners and campaigners at referendums must have a 'responsible person'. This person is responsible for making sure that the campaigner's finances comply with the rules on spending, donations and loans.

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Getting started

If you are already registered with us

We have already created user accounts for the registered officers of political parties and campaigners on the registers. We will require an up-to-date email address of an officer so we can send them confirmation that the PEF Online Administrator account is active. If you have not already received an email it may be because we have not got an up-to-date email address for you. Please get in touch to provide an email address.

You can begin to use PEF Online as soon as you receive the confirmation email, which will contain a temporary login and password that you must change when you first log in.

The PEF Online Administrator can activate the accounts and provide access for all of the other party officers

1. Select the party user login option by following the links in PEF Online. This will take you to a new screen.

2. Enter the temporary login and password we sent you in the confirmation email into the box labelled 'party/campaigner user log-in'.

3. You can now change these temporary details and activate others' accounts – see 'Managing your user accounts' (page 8).

Once you are logged into the system look for the '?' to access on-screen help.

If you are registering a new party or campaigner

You will need to set up a PEF Online Administrator by completing Form PEF 1: Nomination of PEF Online administrator and the acceptance of terms and conditions. You must read the terms and conditions of use before completing the form.

PEF 1

You can send the signed form to us, or you can fax or email it to us. Our contact details are at the end of the form PEF 1.

When the PEF Online Administrator has been created, you then need an active user account before you can register the party or campaigner. You can create a new user by following the links from PEF Online.

1. Select the party user log-in option; this will take you to a new screen.

2. Select the register now button at the bottom of the page; this will take you into the registration page.

3. Complete the form on the screen by following the on-screen instructions – you will be asked for personal, correspondence and security details. Once completed click create user.

This user is automatically set up as the PEF Online Administrator, but you will be able to amend these details if necessary – see user management.

Note: when you create a new user you are agreeing to the site's user terms and conditions.

Once you have created the user account and logged in you will have the option to register a new political party or non-party campaigner.

Look for the '?' to access on-screen help.

Important

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Maintaining your registration

Log-in and use the View Profile menu option to check that your registered details are up to date.

Registration renewal

This option is only available when it is required. Click on renew registration. For political parties this is only available to the registered Treasurer.

You will be prompted to check that your registration is up to date. See changing registered details below.

You will be prompted to make the renewal payment. This can also be completed online.

Changing registered details

The PEF Online Administrator, the party officers or responsible person can make changes to the registered details.

1. Click on view details and click change details. Replace the information on-screen. There is guidance on each page to help you; or click on the Help option at the top of each screen.

2. When you are satisfied that all of the information is up to date, navigate to declarations. The system calculates who needs to authorise the changes made based on the legislative requirement.

3. Only the treasurer or the responsible person can authorise most changes. If another officer's authorisation is required, they will need to log-in and make the authorisation individually. Your PEF Online administrator can give them access to the system – see manage users below.

4. When the online declarations have been made, navigate to the Submit page. If payment is required you will be prompted to do this here. Payment can also be completed online.

Please note: it is possible to change all of your registered details online.

However, where an application involves a **change to an officer role** we need the authorisation of both the incoming and outgoing officer by printing the form generated by PEF Online and delivering it to us by post, fax or email with the relevant persons' signature.

Creating and submitting returns

Log-in and use the view Returns to examine previously submitted returns or click create returns to create a new return or nil return.

1. Select the type of return and the reporting period

2. The screen is configured differently for each return type. Follow the instructions on screen or use the Help option at the top of the page.

3. When you are ready to submit the return you will have two options. If the treasurer or the responsible person are users on the system, they can log in and authorise the return online. Alternatively, you will have to print a summary and deliver this to us with the treasurer's or responsible person's signature by post, fax or email.

For more advanced help in compiling and submitting returns please contact us and we will be happy to help.

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Managing your user accounts

Please note it is the responsibility of the PEF Online Administrator to ensure that Users on PEF Online are kept up to date. We recommend regularly reviewing who you allow to access your profile and removing user's access when it is no longer required.

Activating an existing user

If your party or campaigner is already registered then the officers will already have profiles. For these officers to become PEF Online users the administrator will have to activate their accounts.

PEF Online Administrator

The PEF Online Administrator can activate existing users through the manage users option on the menu.

1. Click on the manage users option and you will see a list of existing Users, Party Officers and Accounting Unit Officers on the screen.

2. Select the name of an individual user and click view in the final column of their listing

3. Use the change email address link to add the email address of this user.

4. Un-tick the box labelled 'do not contact by email' (see page 12 for details for the online administrator).

5. Click save.

The user will receive an automatically generated email containing temporary security details.

The user

Your account is ready to use once you receive the email containing your temporary security details.

1. Follow the link in the email and use the temporary security details to log in.

Important

Please note: Email addresses are the unique identifiers for PEF Online users – only one user account can be attached to an email address.

2. You will be prompted to change your username and password and add a security question and answer. Select save.

3. You will be presented with your user profile page. Check the details and make any amendments. Select save.

You can now use PEF Online.

Create a new user

Your PEF Online Administrator can create as many or as few users as required. Use the manage users option on the menu.

1. Click add user – this will take you to a new screen 'nominate user'.

2. Enter the new user's email address and click 'create user' to set up a new user account with access to PEF Online.

3. You will be presented with the User details page. Complete the mandatory fields – these are marked with an asterisk (*)

Remove a user

Your PEF Online Administrator should remove users when their access is no longer required. Use the manage users option on the menu.

1. Identify the user and access their profile by clicking View.

2. Use the Delete User option at the bottom of the page.

Please note that you can only remove a user if they do not hold a statutory role within the party, non-party campaigner or registered campaigner.

Registered officers or responsible persons who choose not to use PEF Online

If you do not want to be contacted by email or use PEF Online you have the option for your online administration to be automatically delegated to the PEF Online administrator by asking the administrator to leave the 'do not contact by email' box ticked in your user profile.

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You may still need to sign forms and declarations generated by PEF Online as part of fulfilling your role. Your PEF Online administrator will need to print out these forms and declarations for you to sign.

If you are signing a form or declaration, it is your responsibility to be fully informed before you sign it.

🔔 Important

How we can help

You can find more information in the guidance documents we have suggested in this document, or you can view our full range of guidance and up-to-date resources on our website.

If it's easier, you can also contact us on one of the phone numbers or email addresses below. We are here to help, so please get in touch.

Call us on:

- England: 020 7271 0616
  pef@electoralcommission.org.uk
- Scotland: 0131 225 0200
  infoscotland@electoralcommission.org.uk
- Wales: 029 2034 6800
  infowales@electoralcommission.org.uk
- Northern Ireland: 028 9089 4020
  infonorthernireland@electoralcommission.org.uk

Visit us at www.electoralcommission.org.uk

We welcome feedback on our guidance – just email us at: pef@electoralcommission.org.uk