

PEF Online: Getting started

This document is for regulated organisations and individuals who want to know how to begin using our secure database – PEF Online.

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Terms and expressions we use

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

You do not have to follow this guidance, but if you do, you will normally be doing enough to comply with the law.

Our approach to enforcement

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, members' associations, recognised third parties and permitted participants in a referendum who want to use PEF Online to:

- register with us
- maintain registration details
- submit donations and loans reports and
- submit campaign spending returns to us

The document covers:

- An introduction to PEF Online
- Working with PEF Online
- Choosing an administrator
- Getting started if you are already registered with us
- Getting started if you are registering a new party or campaigner
- Managing your user accounts

Related documents:

- [Introduction to registering a political party](#)
- [Introduction to being a party treasurer](#)
- [Introduction for non-party campaigners](#)
- [Introduction to referendum campaigning](#)

Forms and explanations:

- [Form PEF01: Nomination of PEF Online administrator](#)
- [Form PEF02: Change of PEF Online administrator](#)

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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. You can complete registration and once registered maintain your registered details using PEF Online. It also allows you to submit statutory donations and loans reports and campaign spending returns electronically.

Introduction

We regulate party and election finance so we:

- register political parties and maintain the registers of political parties in Great Britain and Northern Ireland
- register other political campaigners and
- publish details of where political parties and other campaigners get money from and how they spend it

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

How working with PEF Online benefits you?

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

Because you work directly with the database you have greater control over the information you provide and you are able to recall 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 political parties or campaigners 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.



You can choose one of the registered officials in your organisation's set-up e.g. the party treasurer of a political party, or the responsible person of a recognised third party. But you do not have to choose a registered official as you administrator.

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
- Amend the organisation's details

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 a designated role. For example, the Leader, Nominating officer, Party treasurer or Campaigns officer positions within a political party or the Responsible person position for non-party campaigners.

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

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](#)

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

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Getting started

If you are already registered with us

You need to set up a PEF Online Administrator position by completing [Form PEFO 1: Nomination of PEF Online administrator](#). You must read the [terms and conditions of use](#) before completing the form.



You can send the signed form to us. Alternatively we will accept a copy of the signed form by fax or email. See the contact details at the end of the [Form PEFO 1](#).

We will send you confirmation that the PEF Online Administrator account is active by email.

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 can change when you first login.

We have already created the user accounts for the registered officers of political parties and campaigners on the registers. The PEF Online Administrator can activate these accounts and provide access for all other users.

1. Following the links from [PEF Online](#) by selecting the **login to e-filing** option. 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 '**Login to PEF Online**'.
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 need an active user account before you can register. You can create a new user by following the links from [PEF Online](#).

1. Select the **login to e-filing** 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 setup 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 political campaigner.

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

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Managing your user accounts

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

Activating an existing user

PEF Online Administrator

The PEF Online Administrator can activate existing users through the **Manage users** option on the menu. [Insert hyperlink to screen shot]

1. Click on the **Manage users** option and you should see a list of existing Users, Party Officers and Accounting Unit Officers on the screen.
2. Select the individual 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**'.
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.
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. [Insert hyperlink to screen shot].

1. Click **add user** – this will take you to a new screen ‘Nominate user’. [Insert hyperlink to screen shot].
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 (*)

Registered officers 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 responsibility 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.

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

It remains your responsibility to be fully informed about any forms or declarations you sign. You may need to liaise with your PEF Online administrator to ensure you are fully informed before you sign a declaration.



Changing the PEF Online administrator

If you want to change your PEF Online administrator you cannot do this within PEF Online. You must complete [Form PEFO 2: Change of PEF Online administrator](#).



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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

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