Electronic Filing

Reporter 5
(For PC users only; No Mac version.)

- If you have not already done so, please visit the OCPF website, www.ocpf.us, to download the software. A link to start the download is available under the "E-File" tab on the home page.

- After the software is installed, open Reporter 5 (the blue "R" icon on your desktop).

- Reporter 5 starts with a wizard that helps you set up the software for use.

- On the new filer page, enter your CPF ID and select your filer type from the list. If you are unsure of your filer type you can press the F1 key on your keyboard to open the help file or contact OCPF and we will be happy to assist you with your software setup.

- If you have already registered with OCPF, most of the fields will fill in based on the information in our database. You may need to enter your password, bank name and e-mail address.

- If you have not registered with OCPF, you will need to do so before you set up the software since you need a CPF ID and password to complete the software registration and to electronically file your report.

- On the next page, you can register your software, use our online backup service and migrate data from other versions of the Reporter software you may have used in the past.

- Once you have finished setting up the software, Reporter is ready for use. The software always starts at the Receipts schedule. You should enter all of your report information on the schedules before you create a draft report. You can move between the schedules by clicking on the "Schedules" button on the toolbar at the top of the screen and selecting the desired schedule from the list.

- Once you have entered all of your report information, click on the "Reports" button on the toolbar and select "Official Reports" from the list.

- Click on the "Create" button on the left side of the screen to open a wizard that will guide you through setting up your report.

- Once the report is created, you electronically file the report by clicking on the "E-File" button on the left and following the instructions on the screen.

Web Reporter
(Web application; Open to all users.)

- Please visit our website, www.ocpf.us. A link to sign in to Web Reporter is available under the welcome banner and also under the "E-File" tab on the home page.

- Enter your CPF ID number and password in the fields provided and then click on the "Login" button.

- If you do not have a CPF ID number and password, you need to contact OCPF. You will need a CPF ID and password to electronically file your report.

- Click on the "Create a draft report" link on the gray navigation menu on the left side of the page.

- You can then select the type of report you wish to file from the options at the top of the page. Fill out the rest of the fields and click on the "Create Draft Report" button.

- The gray navigation menu will change. You will now have a link to your report and all of the schedules that you need to file. You can click on each schedule link to enter the information for that schedule. Anytime you need to see the front page of your report, click on the main report link.

- Drafts are saved on the system until the report is electronically filed. If you need to log off before you finish your report, simply click on the "Log-Out" link and close your browser. Your draft report will be saved on exit. To return to your draft report, log back in to Web Reporter from the OCPF home page and click on the "My Drafts" link on the gray navigation menu. Your draft report will be listed as the current draft and you have the action buttons on the right side of the draft to Edit (to continue working on the draft), Print, E-File or Delete. You also have the option of saving your draft as a PDF file for e-mailing, etc.

- When you have finished your draft report, you can either click on one of the "File" buttons on the front page of the report or click on the "E-File" button from the "My Drafts" section to electronically file your report with OCPF.

If you have any questions about these instructions, or if you require assistance in filing your report, please contact OCPF at (617) 979-8300 and we will be happy to help you.