

COMMITTEE FINANCE REPORTING

MONTANA COMMISSIONER OF POLITICAL PRACTICES

CPPHELP@MT.GOV / [@MONTANACOPP](https://twitter.com/MONTANACOPP)



FILE YOUR REPORTS ELECTRONICALLY, USING CERS

- **ALL REPORTS MUST BE FILED ELECTRONICALLY, USING THE CAMPAIGN ELECTRONIC REPORTING SYSTEM (CERS)**
- **ACCESS CERS FROM THE COPP'S WEBSITE, [HTTPS://POLITICALPRACTICES.MT.GOV/](https://politicalpractices.mt.gov/)**
 - **CLICK THE 'ACCESS CERS' ICON**

ONLINE SERVICES FORMS REPORTING CALENDARS, TRAINING SCHEDULE CONTRIBUTION LIMITS ABOUT US Search

CANDIDATE AND COMMITTEE INFORMATION THE LEGISLATIVE SESSION & LOBBYING

CAMPAIGN FINANCE DISCLOSURE ETHICS

COMPLAINT DOCKET DECISIONS AND ADVISORY OPINIONS

Commissioner Chris Gallus

[Guidance on how to file as a candidate with COPP](#)

[2024-2025 Candidate Campaign Contribution Limits Summary - AVAILABLE HERE](#)

+see [HERE](#) for COPP's proposed amendments to Montana's campaign contribution limits

+see [HERE](#) for COPP's Adoption Notice of the amendments to Montana's campaign contribution limits

[2024 Candidate and Committee Search - AVAILABLE HERE](#)

ACCESS CERS

ACCESS THE HARD COPY SEARCH

ACCESSING CERS

1. CLICK 'ACCESS MY ACCOUNTS'

The screenshot shows the CERS dashboard with a blue arrow pointing to the 'Access My Accounts' button. The dashboard includes a sidebar with navigation options like 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The main content area displays 'Candidate and committee Activity for Election Year 2022' with a table of statistics.

	Total	Nov 2021	Dec 2021	Change
Active Candidate Registrations	172	29	7	22 ↓
Active Committee Registrations	557	81	20	61 ↓
Total Active Registrations	729	17	10	7 ↓
New Candidate Registrations	29	7	22 ↓	
Updated Candidate Registrations	81	20	61 ↓	
New Committee Registrations	17	10	7 ↓	
Updated Committee Registrations	13	6	7 ↓	

2. LOGIN (USING OKTA)

The screenshot shows the Montana.gov login page. It includes a 'SIGN IN' button and fields for 'Username' and 'Password'. A note states: 'State Employees use your state network username, all others use email address'. There is also a 'Remember me' checkbox and a 'Sign In' button.

3. SELECT YOUR COMMITTEE

The screenshot shows the CERS dashboard with the 'Committee List' table. The table lists committees with columns for Committee Name, Year, Status, Address, and Committee Type.

Committee Name	Year	Status	Address	Committee Type
Montanans Against Initiative 123 (Test)	2022	Active	1209 Bth Ave., Helena, MT 59601	Ballot Issue
Coffee (TEST) Incidental	2020	Active	111 Bth, Helena, MT 59401	Incidental
Coffee PAC (TEST)		Active	1234 Test, Helena, MT 59601	Independent

UPDATE THE C2 WITHIN 5 DAYS OF CHANGE

**TREASURER REVISION,
ADDRESS, EMAIL OR PHONE
NUMBER CHANGE, ETC.**

Welcome

ePass Home Version

Welcome to the Campaign Electronic Reporting System » You are now logged in.

Candidates **Committees** Access ID Search

Committee List

Display 5 records Search:

	Committee Name	Year	Status	Address	Committee Type
<input type="checkbox"/>	Committee for a Four-Day Work Week (test account)		Amended	123 Mailing Address, Helean, MT 59601	Independent

Showing 1 to 1 of 1 entries

[Add New Registration](#) [View Registration](#) **[Amend Registration](#)** **[Finance Reports](#)**

C-2: IMPORTANT ELEMENTS!

- EMAIL
- PHONE
- SUPPORT & OPPOSITION INFO

Electronic Reporting System

Welcome

Agent Committee Registration and Reporting - updates every 30 days

Committee Information

*Committee Name: Committee for a Free Day Work Week (not account)

*Mailing Address: 123 Mailing Address

*City: Helena *State: Montana *Zip: 59601

Physical Address

City: *State: *Zip:

*Committee Type: Independent *Incorporated: No

Committee Treasurer Information or Local Government Authorized Signing Authority

*First Name: Treasurer *Last Name: Smith MI SA

*Mailing Address: 345 Mailing Address

*City: Helena *State: Montana *Zip: 59601

Physical Address

City: *State: *Zip:

*Phone: (406) 555-1234 Alternate Phone:

*Email address: helena@helena.gov

Deputy Treasurer Information

Name	Mailing Address	Physical Address	Phone	Alternate Phone	Email Address
Add / Edit / Delete					

Committee Account Information

*Primary Bank Name: Bank of the West

*Bank Address: 345 Market Way

*City: Helena *State: Montana *Zip: 59601

Secondary Bank Name: Secondary Bank Name

Bank Address: Bank address

City: *State: *Zip:

Additional Office Information

Name	Mailing Address	Physical Address	Phone	Alternate Phone	Email Address
Add / Edit / Delete					

Purpose of Committee and/or Name(s) of Candidate(s) or Ballot Issue(s) Supported or Opposed

Candidate and/or Ballot Issue	Position	Issue Status
Add / Edit / Delete		

CERTIFICATION: I hereby verify that the foregoing statements are true, complete and correct.
 For County, Municipal, or School committee only. Please check this box if Contribution/Expenditures will not exceed \$100.00. If \$100.00 is exceeded, filing of Campaign finance reports will be required.

Approved filing Cancel

REPORTING DATES

- **FINANCE REPORTS DUE MARCH 30, APRIL 30, MAY 30, JUNE 30, AUGUST 30, SEPTEMBER 30, OCTOBER 30, AND NOVEMBER 30, 2022**
- **FULL REPORTING CALENDAR AVAILABLE ON THE [REPORTING CALENDARS](#) SECTION OF COPP WEBSITE**

Committee Even Election Year Calendar Committee Finance Report Calendar June Primary/November General elections

Report form C-4 or C-6 must be filed for each reporting period to disclose all transactions that occurred during the specific reporting period.

Filing Deadline	Reporting Period
April 5*	Quarterly- Date of first contribution/expenditure through March 31
July 5*	Quarterly- April 1 through June 30
October 5*	Quarterly- July 1 through Sept. 30
January 5*	Quarterly- Oct. 1 through December 31
March 30	Monthly- January 1 through March 25
April 30	Monthly- March 26 through April 25
May 25 through Primary election date (C-7 and C-7E Reporting Period)	File form C-7 within 2 business days if a contribution of \$500 or more is received from a single source between May 25 and the day before the primary election
	File form C-7E within 2 business days if an expenditure of \$500 or more is made between May 25 and the day before the primary election
May 30	Monthly- April 26 through May 24
June 30	Post Primary- May 25 through June 25
August 30	Monthly- June 26 through August 25
September 30	Monthly- August 26 through September 25
October 25 through General election date (C-7 and C-7E Reporting Period)	File form C-7 within 2 business days if a contribution of \$500 or more is received from a single source between October 25 and the day before the general election
	File form C-7E within 2 business days if an expenditure of \$500 or more expenditure is made between October 25 and the day before the general election
October 30	Monthly- September 26 through October 24
November 30	Monthly- October 25 through November 25
	Reference 13-37-226(1)(e) , Mont. Code Ann. for post-election year reporting dates

STATE OF MONTANA POLITICAL CAMPAIGN CONTRIBUTION
LIMITS SUMMARY

Applicable as of October 1, 2021 (Senate Bill 224, passed by the 2021 Montana Legislature)

This guide is just a summary - for complete requirements, see [Title 13, Chapters 35 and 37, MCA](#).

CANDIDATE

To Own Campaign.....No Limit

INDIVIDUAL Human Being

To a Political Party Committee.....No Limit

To a Political Action Committee.....No Limit

To a Ballot Issue Committee.....No Limit

To candidates for Governor/Lt. Governor.....\$1,000 per election

To a candidate for Other Statewide Office*.....\$700 per election

To a candidate for Other Public Office**.....\$400 per election

POLITICAL COMMITTEE

To a Political Party Committee.....No Limit

To a Political Action Committee.....No Limit

To a Ballot Issue Committee.....No Limit

POLITICAL COMMITTEES [Excludes Political Party Committees]

To candidates for Governor/Lt. Governor.....\$1,000 per election

To a candidate for Other Statewide Office*.....\$700 per election

To a candidate for Other Public Office**.....\$400 per election

POLITICAL PARTY COMMITTEE Aggregate Limits from ALL political party committees

Please Note: Political Party Committees may not contribute to candidates for judicial offices (i.e. Supreme Court Justice, District Judge, Justice of the Peace).

A political party committee may endorse a candidate for judicial office and make an independent expenditure relating to such an election. See Sanders County Republican Party v. Bullock, 698 F3d 741 (9th Cir, 2012). See also personnel services exception ARM 44.11.225 (3).

To candidates for Governor/Lt. Governor.....\$100,000 per election

To a candidate for Other Statewide Office*.....\$75,000 per election

To a candidate for Public Service Commission.....\$15,000 per election

To a candidate for State Senate.....\$3,000 per election

To a candidate for Other Public Office**.....\$2,000 per election

CORPORATION OR UNION

May not contribute directly or indirectly to a candidate, [13-35-227, MCA](#).

**Other Statewide Office: Attorney General, Secretary of State, State Auditor, Superintendent of Public Instruction, Supreme Court Justice, Clerk of the Supreme Court*

*** Examples of Other Public Office: State District—Public Service Commissioner, State Senate, State House, and District Judge County—All County elected Officials, City—All City elected officials School—All School District Trustees*

CAMPAIGN CONTRIBUTION LIMITS

- **COMMITTEES NOT LIMITED IN HOW MUCH THEY CAN ACCEPT FROM CONTRIBUTORS**
- **KEEP IN MIND THAT CANDIDATES HAVE CAMPAIGN CONTRIBUTION LIMITS**
 - **AGGREGATE LIMITS FOR POLITICAL PARTY COMMITTEE CONTRIBUTIONS**
 - **[HTTPS://POLITICALPRACTICES.MT.GOV/HOME/CONTRIBUTION-LIMITS](https://politicalpractices.mt.gov/home/contribution-limits)**

CORPORATE CONTRIBUTIONS

- **POLITICAL COMMITTEES CAN ACCEPT CORPORATE CONTRIBUTIONS**
- **CANDIDATES CANNOT ACCEPT CORPORATE FUNDS, DIRECTLY OR INDIRECTLY**
 - **CORPORATE FUNDS CAN BE USED FOR INDEPENDENT EXPENDITURES**
- **BEST PRACTICE= SEPARATE FUNDS RECEIVED FROM CORPORATE CONTRIBUTORS FROM FUNDS RECEIVED FROM NON-CORPORATE CONTRIBUTORS**

FILING A COMMITTEE FINANCE REPORT- STEPS

- **STEP 1: ACCESS THE FINANCE REPORT**
- **STEP 2: REPORT CONTRIBUTIONS RECEIVED, EXPENDITURES MADE, DEBTS OWED, AND PAYMENTS**
- **STEP 3: CERTIFY AND FILE THE REPORT**

STEP 1: ACCESS THE REPORT

Campaign Electronic Reporting System (reportList) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/reportList

Campaign Electronic Reporting System

Dashboard

Welcome

Instructions

To add a new report, click the button below that corresponds to the report you wish to file (e.g. Add New C6, Add New C7). If multiple committee accounts exist, you must check the box next to the relevant committee for the specific report.

To update or amend a report, check the box next to the relevant report, and then click on the Update or Amend Report button below.

To file a pending report, check the box next to the relevant report, and then click on the Update or Amend Report button to open the report. Once the report is open, click the File tab, check the box to confirm that the report is accurate, and click Certify and File to file the report.

Committee Report List

Display 5 records

	From	To	Report Title	Type	Status	Report
<input type="checkbox"/>	08/01/2020	09/01/2020	Incidental Political Committee Finance Report	C4	Pending	Initial

Showing 1 to 1 of 1 entries

View Report Update or Amend Report Add New C4 Add New C7 Add New C7E Go Back Exit

- **NAVIGATE TO THE COMMITTEE REPORT LIST**
- **SELECT THE 'ADD NEW' ICON TO BEGIN A NEW COMMITTEE FINANCE REPORT; SELECT THE 'UPDATE OR AMEND REPORT' ICON TO UPDATE OR AMEND AN EXISTING REPORT**
- **BEST PRACTICE IS TO UPDATE REGULARLY AS YOU RECEIVE CONTRIBUTIONS AND MAKE EXPENDITURES**
 - **DATA IS NOT PUBLIC UNTIL A REPORT IS FILED**



ACCESS THE REPORT

- ***TIP!* CHECK THE REPORTING PERIOD. ACTIVITY REPORTED USING A DATE OUTSIDE THE REPORTING PERIOD MAY LEAD TO AN ERROR MESSAGE**

- **FROM= BEGINNING OF THE REPORTING PERIOD (AUTOFILLED BY CERS)**
- **TO= END DATE FOR REPORT. SHOULD BE 5 DAYS BEFORE REPORTING DAY, [13-37-228\(2\)](tel:13-37-228(2)), MCA**

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Campaign Electronic Reporting System

Sign Out coffee4comis...

Welcome ePass Home Version

Committee Campaign Finance Report > (C-4)

Committee Information

Committee Full Name: Coffee (TEST) Incidental Election Year: 2020

Mailing Address: 111 8th Helena, MT 59401 Committee Type: Incidental

*From: 08/01/2020 *To: 09/01/2020 Status: Pending

Contributions Expenditures Debts Payments Attachments File

Individuals Committee Fundraiser Refunds, Etc Help

Entity	Election Type	Occupation	Employer	Date	Amount	In-Kind Value	In-Kind Description	Total to Date
No records to view								

Add Edit Delete Page 1 of 0 5

Save Exit - Please Select - Download Template Data Load Prev Next

**STEP 2: REPORT
CONTRIBUTIONS
RECEIVED,
EXPENDITURES
MADE, DEBTS OWED,
AND PAYMENTS**



REPORTING CONTRIBUTIONS RECEIVED

- **COMMITTEE MUST KNOW NAME OF ALL CONTRIBUTORS!
ANONYMOUS CONTRIBUTIONS NOT ALLOWED**
- **REPORT ALL CONTRIBUTIONS RECEIVED USING THE
'CONTRIBUTIONS' TAB**
- **FIVE TYPES OF CONTRIBUTORS:**
 - **INDIVIDUAL CONTRIBUTORS**
 - **COMMITTEE CONTRIBUTORS**
 - **FUNDRAISER CONTRIBUTORS**
 - **REFUNDS, ETC.**
 - **LOANS**



ADDING INDIVIDUAL CONTRIBUTIONS

The screenshot displays the CERS web application. The browser address bar shows the URL: cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport. The page title is "Campaign Electronic Reporting System". The user is logged in as "coffee4comis...". The main content area shows the "Committee Campaign Finance Report" for "Coffee PAC (TEST)". The report details include "Committee Full Name: Coffee PAC (TEST)", "Address: 1234 Test Helena, MT 59601", and "Committee Type: Independent". The reporting period is set from "04/26/2020" to "05/25/2020" with a status of "Pending". The "Contributions" tab is selected, and the "Individuals" subtab is active. A table with columns for "Entity", "Election Type", "Occupation", "Employer", "Date", "Cash/Check Amount", "In-Kind Value", "In-Kind Description", and "Total to Date" is shown, currently displaying "No records to view". A red star is placed over the "Add" button in the table's toolbar. A large blue arrow points from the "Contributions" tab to the "Individuals" subtab.

- **INDIVIDUAL CONTRIBUTION= CONTRIBUTION RECEIVED FROM AN INDIVIDUAL**
 - **INCLUDES CONTRIBUTIONS RECEIVED FROM A CANDIDATE/CANDIDATE'S CAMPAIGN**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'INDIVIDUALS' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW CONTRIBUTION**

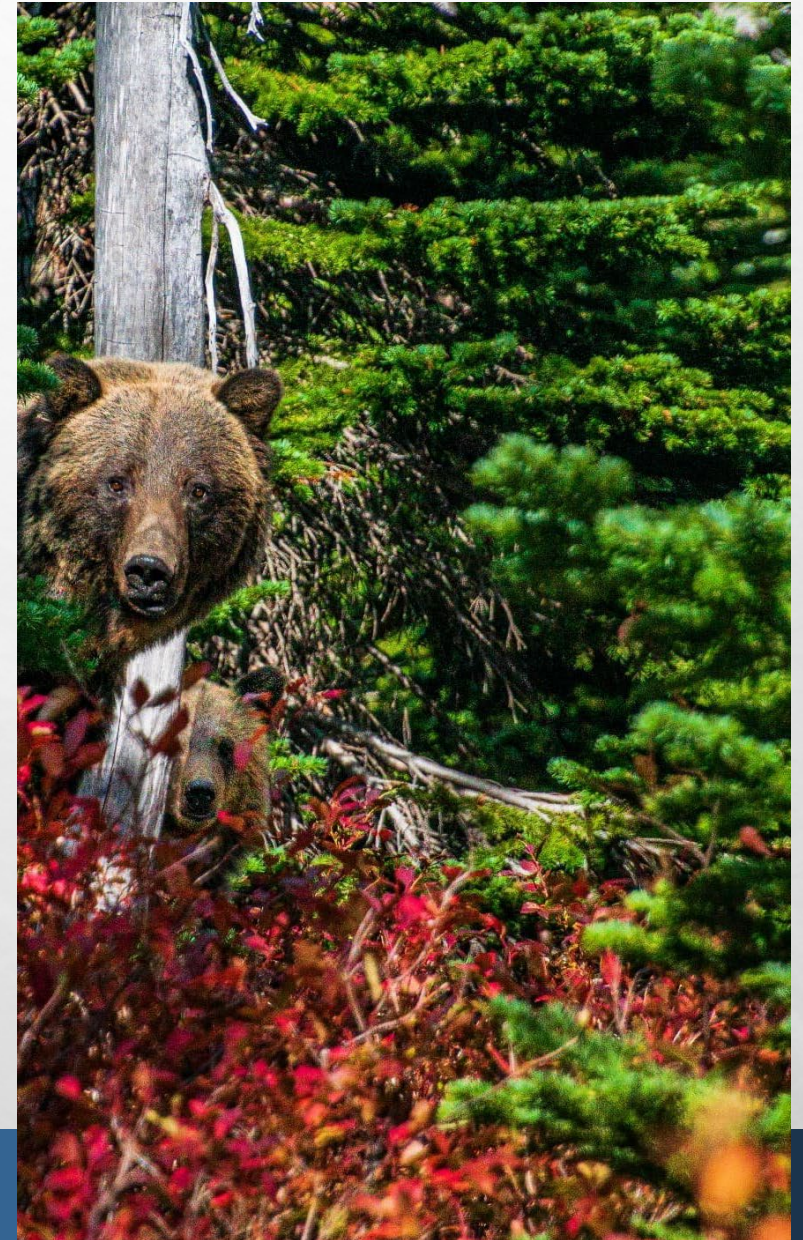
ADDING INDIVIDUAL CONTRIBUTIONS

The screenshot shows the 'Edit Individual Contributors' form in the Campaign Electronic Reporting System. The form is divided into two main sections: 'Report Period' and 'Report Detail Entry'. The 'Report Period' section includes 'From Date: 04/26/2020' and 'To Date: 05/25/2020'. The 'Report Detail Entry' section contains various input fields: 'Election Type' (a dropdown menu), 'Date' (a date picker), 'Last Name' (a text field), 'First Name' and 'Middle Initial' (text fields), 'Street Address' (a text field), 'City/State/Zip' (a dropdown for City, a dropdown for State, and a text field for Zip Code), 'Employer' (a text field), 'Occupation' (a text field), and 'Cash/Check Amount' (a text field with a dollar sign icon). A sidebar on the left shows navigation options like 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. A sidebar on the right shows 'Pass Home' and 'Version' buttons. The browser address bar shows 'cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport'.

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR CONTRIBUTOR**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

ADDING INDIVIDUAL CONTRIBUTIONS

- **REMINDER- ANONYMOUS CONTRIBUTIONS ARE PROHIBITED!**
- **ALL CONTRIBUTORS WHOSE AGGREGATE (TOTAL) CONTRIBUTIONS ARE \$50 OR MORE MUST BE REPORTED WITH THE CONTRIBUTOR'S FULL NAME, ADDRESS, OCCUPATION, AND EMPLOYER**
 - **OCCUPATION- BE SPECIFIC! FOR EXAMPLE: 'FINANCIAL CONSULTANT' OR 'IT CONSULTANT' INSTEAD OF JUST 'CONSULTANT'**
 - **EMPLOYER- INCLUDE THE FULL NAME OF THE BUSINESS/ENTITY THAT EMPLOYS THE CONTRIBUTOR**



ADDING COMMITTEE CONTRIBUTIONS

The screenshot shows the CERS interface for a Committee Campaign Finance Report. The page title is "Committee Campaign Finance Report" (C-6). The committee name is "Coffee PAC (TEST)" and the committee type is "Independent". The reporting period is from 04/26/2020 to 05/25/2020, with a status of "Pending".

The "Contributions" tab is selected, and the "Committee" subtab is active. Below the tabs is a table with the following columns: Entity, Committee Type, Election Type, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date. The table currently contains no records. A red star highlights the "Add" button in the table's toolbar.

Buttons at the bottom of the page include Save, Exit, Download, Template Data Load, Prev, and Next.

- **COMMITTEE CONTRIBUTION= CONTRIBUTION RECEIVED FROM A POLITICAL COMMITTEE**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'COMMITTEE' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW CONTRIBUTION**

ADDING COMMITTEE CONTRIBUTIONS

The screenshot shows the 'Edit Committee Contributions' form in the Campaign Electronic Reporting System (CERS). The form is titled 'Edit Committee Contributions' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)'. The form is divided into two tabs: 'Row Details' (selected) and 'Entity Search'. The 'Row Details' tab contains the following fields:

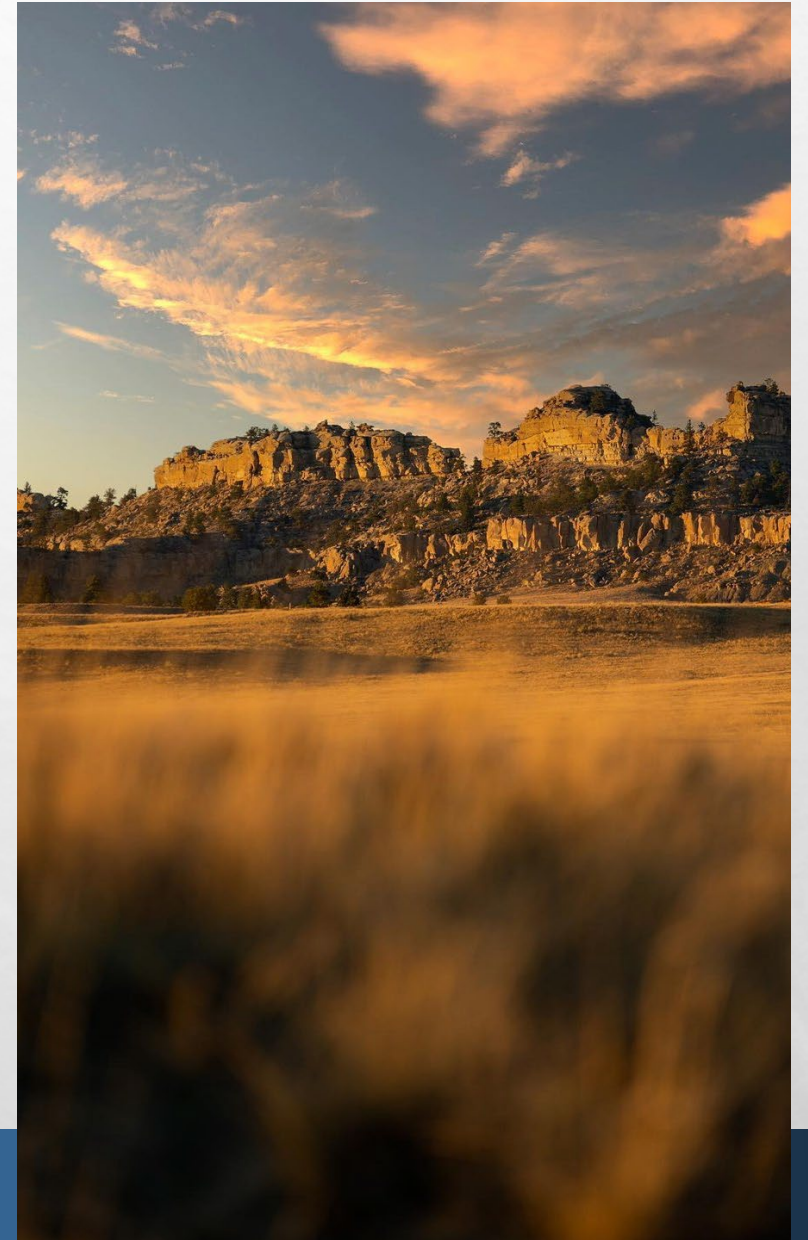
- Report Period:** From Date: 04/26/2020, To Date: 05/25/2020
- Report Detail Entry:**
 - Election Type: - Please Select -
 - Date: Date (calendar icon)
 - Committee Type: - Please Select -
 - Is a corporate contribution?
 - Committee Name: Committee Name
 - Address: Street Address
 - City/State/Zip: City, - Please Select - (State dropdown), Zip Code
 - Cash/Check Amount: \$ Cash/Check Amount
 - In-Kind Value: \$ In-Kind Value

The form also includes navigation buttons: 'Prev' and 'Next' (green) and 'Total to Date' and 'records to view' (grey).

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR CONTRIBUTOR**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

ADDING COMMITTEE CONTRIBUTIONS

- **COMMITTEE TYPES: BALLOT ISSUE, INCIDENTAL, INDEPENDENT (PAC), POLITICAL PARTY**
- **IF CONTRIBUTION RECEIVED FROM A BUSINESS/CORPORATE ENTITY, THAT ENTITY MAY NEED TO REGISTER WITH COPP AS AN INCIDENTAL COMMITTEE**



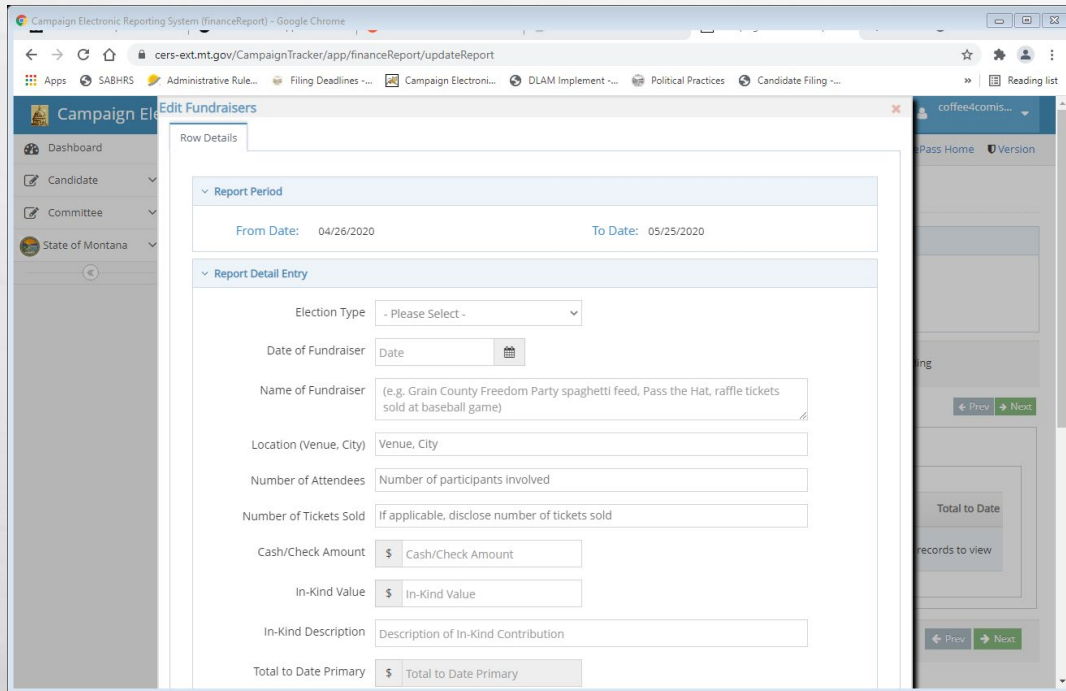
ADDING FUNDRAISER CONTRIBUTIONS

The screenshot shows the CERS interface for a Committee Campaign Finance Report. The 'Contributions' tab is selected, and the 'Fundraiser' subtab is active. A table with columns for Fundraiser Name / Location, Election Type, Date, Attendees, Tickets Sold, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date is displayed. The 'Add' button is highlighted with a red star. A blue arrow points to the 'Fundraiser' subtab.

Fundraiser Name / Location	Election Type	Date	Attendees	Tickets Sold	Cash/Check Amount	In-Kind Value	In-Kind Description	Total to Date
No records to view								

- **FUNDRAISER CONTRIBUTION= AGGREGATE CONTRIBUTIONS UNDER \$50 RECEIVED AT A MASS COLLECTION EVENT**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'FUNDRAISER' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW CONTRIBUTION**

ADDING FUNDRAISER CONTRIBUTIONS

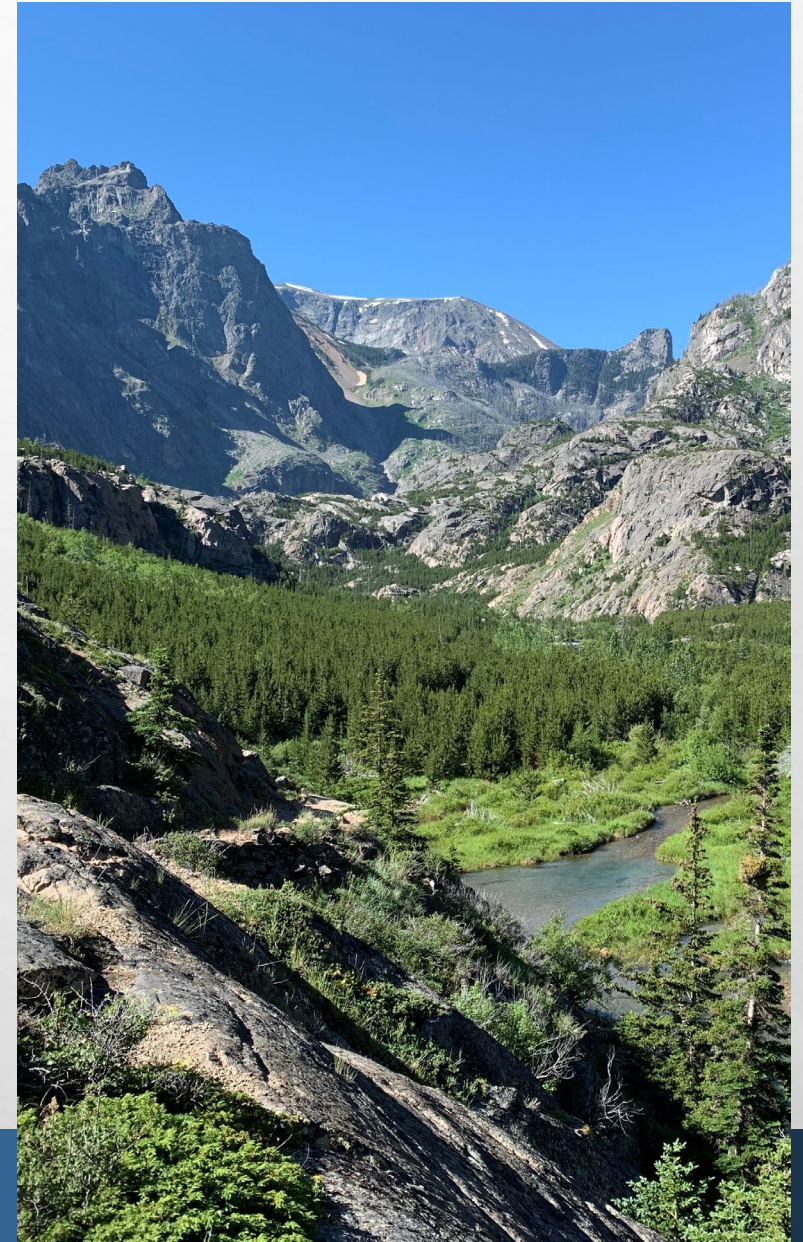


The screenshot displays the 'Edit Fundraisers' form in a web browser. The form is divided into two main sections: 'Report Period' and 'Report Detail Entry'. The 'Report Period' section includes 'From Date: 04/26/2020' and 'To Date: 05/25/2020'. The 'Report Detail Entry' section contains several fields: 'Election Type' (a dropdown menu), 'Date of Fundraiser' (a date picker), 'Name of Fundraiser' (a text input field with a placeholder example), 'Location (Venue, City)' (a text input field), 'Number of Attendees' (a text input field), 'Number of Tickets Sold' (a text input field), 'Cash/Check Amount' (a text input field with a dollar sign), 'In-Kind Value' (a text input field with a dollar sign), 'In-Kind Description' (a text input field), and 'Total to Date Primary' (a text input field with a dollar sign). The form also features 'Prev' and 'Next' navigation buttons.

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

ADDING FUNDRAISER CONTRIBUTIONS

- **REMINDER- THE COMMITTEE MUST KNOW NAME OF ALL CONTRIBUTORS AT FUNDRAISER EVENTS. ANONYMOUS CONTRIBUTIONS ARE NOT ALLOWED!**
- **THE FUNDRAISER SUBTAB IS MEANT ONLY FOR CONTRIBUTIONS OF LESS THAN \$50.00 RECEIVED AT A SINGLE MASS COLLECTION EVENT**
 - **EXAMPLES: GOLF TRIP RAFFLE TICKET SALES; SILENT AUCTION EVENT**
 - **ANY CONTRIBUTION OF \$50.00 OR MORE FROM AN EVENT MUST BE REPORTED USING THE 'INDIVIDUALS' TAB**



ADDING FUNDRAISER CONTRIBUTIONS

- **REPORT EACH INDIVIDUAL MASS COLLECTION EVENT SEPARATELY**
 - **THE DATE OF THE EVENT, THE LOCATION OF THE EVENT, AND THE NUMBER OF ATTENDEES/TICKETS SOLD MUST BE INCLUDED FOR EACH INDIVIDUAL EVENT**



REFUNDS, ETC.

The screenshot shows the CERS interface for a Committee Campaign Finance Report. The 'Contributions' tab is selected, and the 'Refunds, Etc.' subtab is active. A table with columns for Entity, Election Type, Transaction Type, Previous Trans, Original Transaction, Original Transaction, Original Transaction, Date, and Cash/Check Amount is visible. The 'Add' button is highlighted with a red star. A blue arrow points to the 'Refunds, Etc.' subtab. The interface includes a navigation menu on the left, a top navigation bar, and a bottom navigation bar with buttons for Save, Exit, Download, and Template Data Load.

- **REFUNDS, ETC.= REFUNDS, REBATES, SIMILAR ACTIVITY RECEIVED BY THE COMMITTEE**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'REFUNDS, ETC.' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW REFUND, ETC.**
- **SAVE AFTER EVERY ENTRY!**

REFUNDS, ETC.

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Campaign Electronic Reporting System

Dashboard

Candidate

Committee

State of Montana

Edit Refunds, Etc.

TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries).

Row Details Entity Search

Report Period

From Date: 08/01/2020 To Date: 09/01/2020

Report Detail Entry

Entity Type - Please Select -

Election Type - Please Select -

Date Date

Entity or Last Name Entity or Last Name

First/Middle Initial First Name Middle Initial

Address Street Address

City/State/Zip City - Please Select - Zip Code

Cash/Check Amount \$ Cash/Check Amount

Transaction Type - Please Select -

Was this from a Previous Transaction?

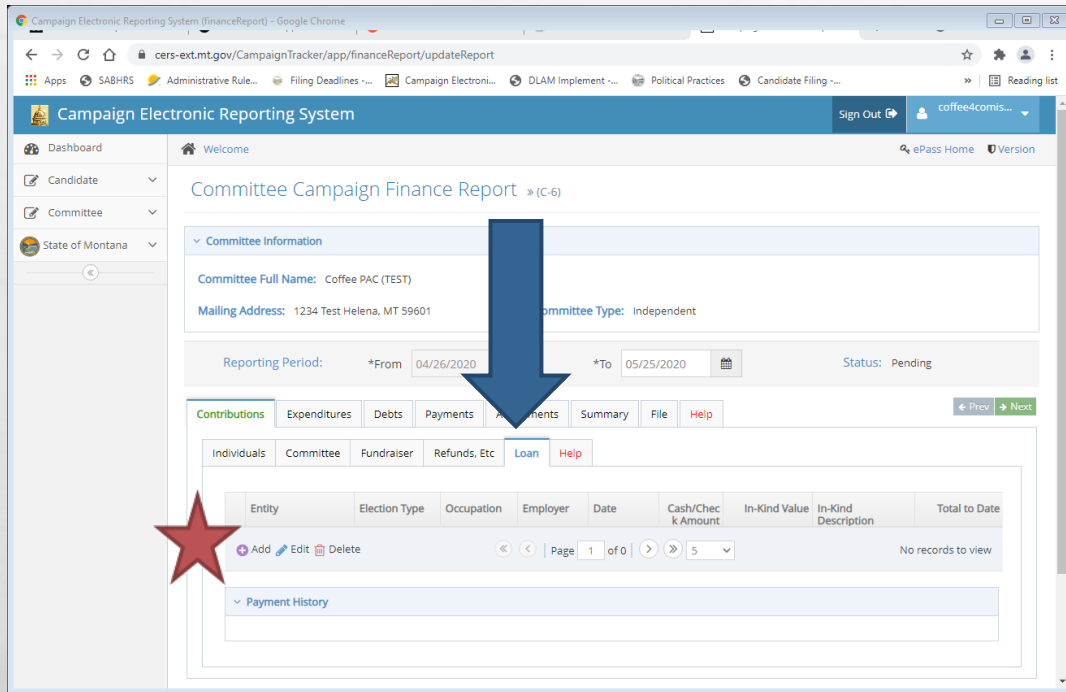
- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR CONTRIBUTOR**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

REFUNDS, ETC.

- **THE “REFUNDS, ETC.” TAB IS USED ONLY TO REPORT REFUNDS, REBATES, OR OTHER INDIRECT CONTRIBUTIONS RECEIVED BY THE COMMITTEE. EXAMPLES INCLUDE:**
 - **INTEREST EARNED FROM THE COMMITTEE BANK ACCOUNT**
 - **REBATES GIVEN TO THE COMMITTEE BY A VENDOR FOR PREVIOUS PURCHASES MADE**
 - **REFUNDS PROVIDED TO THE COMMITTEE BY A VENDOR FOR SERVICES THE COMMITTEE HAS ALREADY PAID FOR**



ADDING A LOAN



- **LOAN= CONTRIBUTION THE COMMITTEE IS OBLIGATED TO PAY BACK**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'LOANS' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW LOAN**

ADDING A LOAN

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Apps SABHRS Administrative Rule... Filing Deadlines... Campaign Electroni... DLAM Implement... Political Practices Candidate Filing... Reading list

Edit Loans

TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries).

Row Details Entity Search

Report Period

From Date: 04/26/2020 To Date: 05/25/2020

Report Detail Entry

Entity Type: - Please Select -

Election Type: - Please Select -

Date of Loan: Date

Last Name: Entity or Last Name

First/Middle Initial: First Name Middle Initial

Address: Street Address

City/State/Zip: City - Please Select - Zip Code

Employer: Employer

Occupation: Contributor's Occupation

Total to Date

records to view

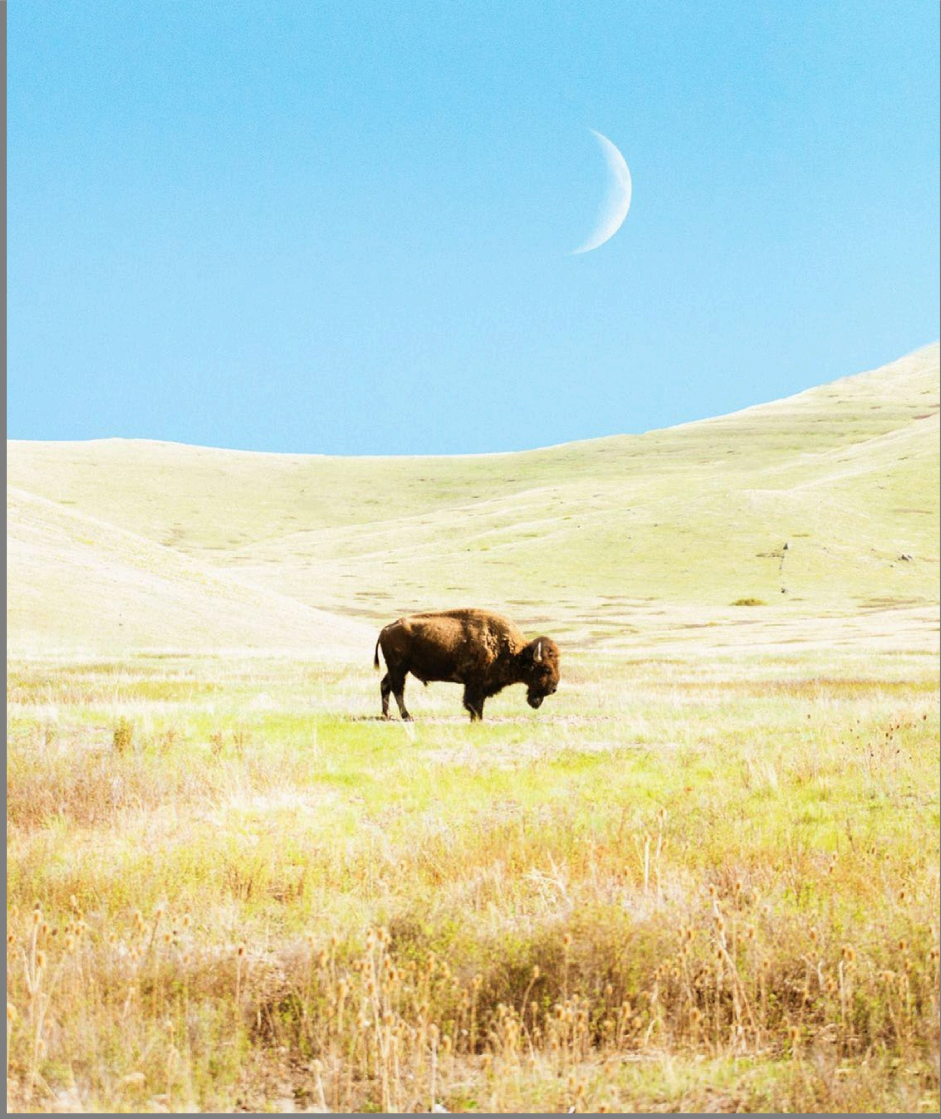
← Prev → Next

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR CONTRIBUTOR**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

REVIEW

LET'S NAVIGATE ON CERS - REAL TIME EXAMPLE
QUESTIONS FROM PARTICIPANTS





REPORTING EXPENDITURES

- **AN EXPENDITURE IS A PURCHASE OR PAYMENT MADE BY A COMMITTEE TO SUPPORT OR OPPOSE CANDIDATE/S OR BALLOT ISSUE/S**
 - **EXAMPLE EXPENDITURES: FLIERS SUPPORTING BALLOT ISSUE A; RADIO ADVERTISEMENTS OPPOSING CANDIDATE B; TELEVISION COMMERCIALS ENDORSING ALL COFFEE PARTY CANDIDATES**
- **REPORT ALL EXPENDITURES USING THE “EXPENDITURES” TAB**

EXPENDITURE VS. INDEPENDENT EXPENDITURE

- **EXPENDITURE**= AN EXPENDITURE COORDINATED WITH THE CANDIDATE/BALLOT ISSUE IT IS MEANT TO BENEFIT
- **EXAMPLES: CONTRIBUTION MADE DIRECTLY TO A CANDIDATE; CAMPAIGN MAILER FINANCED BY A COMMITTEE IN COLLABORATION WITH A SEPARATE BALLOT ISSUE COMMITTEE**
- **REPORT USING THE 'EXPENDITURES' SUBTAB**
- **INDEPENDENT EXPENDITURE**= AN EXPENDITURE MEANT TO SUPPORT OR OPPOSE A CANDIDATE/BALLOT ISSUE THAT IS NOT COORDINATED WITH A CANDIDATE OR BALLOT ISSUE
- **REPORT USING THE 'INDEPENDENT EXPENDITURES' SUBTAB**

ADDING AN EXPENDITURE

- **UNDER EXPENDITURES TAB, NAVIGATE TO THE 'EXPENDITURES' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW EXPENDITURE**

The screenshot displays the 'Campaign Electronic Reporting System' interface. The main content area is titled 'Committee Campaign Finance Report > (c-6)'. Below the title, there is a section for 'Information' with fields for 'Full Name: Coffee PAC (TEST)', 'Address: 1234 Test Helena, MT 59601', and 'Committee Type: Independent'. A 'Reporting Period' section shows dates from '04/26/2020' to '05/25/2020' with a 'Status: Pending'. A navigation bar includes tabs for 'Contributions', 'Expenditures', 'Debts', 'Payments', 'Attachments', 'Summary', 'File', and 'Help'. The 'Expenditures' tab is active, and within it, the 'Independent Expenditures' subtab is selected. Below the subtab is a table with columns: Entity, Election Type, Description of Expense, Refund, Platform, Quantity, Specific Services, Attachment, Corp Funds, Date, and Amount. The table is currently empty, showing 'No records to view'. A red star is placed over the 'Add' button in the table's toolbar. A green arrow points from the 'Expenditures' tab to the 'Add' button.

Entity	Election Type	Description of Expense	Refund	Platform	Quantity	Specific Services	Attachment	Corp Funds	Date	Amount
No records to view										

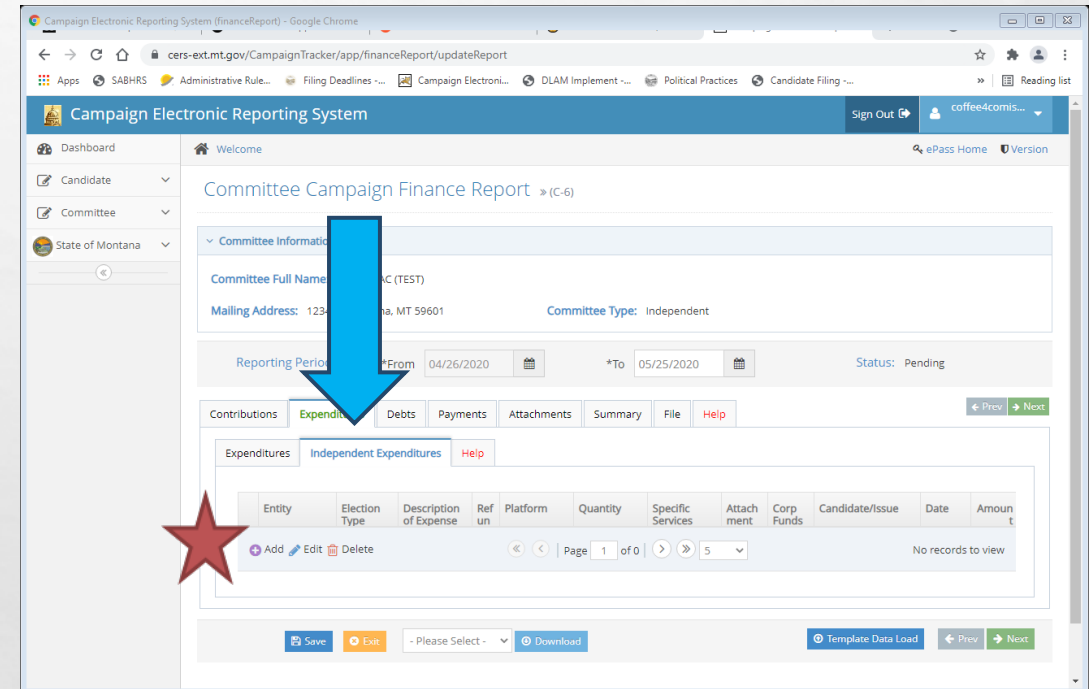
ADDING AN EXPENDITURE

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR ENTITY**
- **WHEN ALL REQUIRED INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

The screenshot shows the 'Edit Expenditures' form in the Campaign Electronic Reporting System (CERS). The form is titled 'Edit Expenditures' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)'. The form is divided into two main sections: 'Report Period' and 'Report Detail Entry'. The 'Report Period' section includes 'From Date: 04/26/2020' and 'To Date: 05/25/2020'. The 'Report Detail Entry' section includes several fields: 'Entity Type' (dropdown menu), 'Election Type' (dropdown menu), 'Date' (text input with a calendar icon), 'Last Name/Vendor Name' (text input), 'First/Middle Initial' (text input), 'Address' (text input), 'City/State/Zip' (text input, dropdown menu, and text input), and 'Amount' (text input with a dollar sign). There are also two checkboxes: 'Is this an over contribution limit refund?' and 'Is this expenditure paid out of corporation funds?'. The form is displayed in a browser window with the URL 'cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport'.

ADDING AN INDEPENDENT EXPENDITURE

- **UNDER EXPENDITURES TAB, NAVIGATE TO THE 'INDEPENDENT EXPENDITURES' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW INDEPENDENT EXPENDITURE**



The screenshot displays the Campaign Electronic Reporting System interface. The main content area shows the 'Committee Campaign Finance Report' for a committee named 'C (TEST)'. The reporting period is from 04/26/2020 to 05/25/2020, and the status is 'Pending'. The 'Expenditures' tab is selected, and the 'Independent Expenditures' subtab is active. A table with columns for Entity, Election Type, Description of Expense, Ref un, Platform, Quantity, Specific Services, Attach ment, Corp Funds, Candidate/Issue, Date, and Amount is visible. Below the table, there is an 'Add' button (indicated by a red star) and a 'Delete' button. A large blue arrow points to the 'Add' button. The interface also includes a sidebar with navigation options like Dashboard, Candidate, Committee, and State of Montana, and a top navigation bar with 'Sign Out' and 'coffee4comis...'.

ADDING AN INDEPENDENT EXPENDITURE

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR ENTITY**
- **WHEN ALL REQUIRED INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

The screenshot shows the 'Edit Expenditures: Independent' form in the Campaign Electronic Reporting System (CERS). The form is titled 'Edit Expenditures: Independent' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries).' The form is divided into two main sections: 'Report Period' and 'Report Detail Entry'. The 'Report Period' section includes 'From Date: 04/26/2020' and 'To Date: 05/25/2020'. The 'Report Detail Entry' section includes several fields: 'Entity Type' (dropdown menu), 'Election Type' (dropdown menu), 'Date' (text input with a calendar icon), 'Last Name/Vendor Name' (text input), 'First/Middle Initial' (text input with 'First Name' and 'Middle Initial' sub-headers), 'Address' (text input with 'Street Address' sub-header), 'City/State/Zip' (text input with 'City' sub-header, a dropdown menu for state, and 'Zip Code' sub-header), and 'Amount' (text input with a dollar sign and 'Amount' sub-header). There are also two checkboxes at the bottom: 'Is this an over contribution limit refund?' and 'Is this expenditure paid out of corporation funds?'. The form is displayed in a browser window with the URL 'cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport'.



REPORTING EXPENDITURES

- **EXPENDITURES MUST BE REPORTED ON THE FINANCE REPORT COVERING THE PERIOD WHERE THE EXPENDITURE WAS MADE**
- **EXPENDITURES MUST BE SUPPORTED BY A “WRITTEN AGREEMENT, INVOICE, BILLING STATEMENT, OR SIMILAR DOCUMENTATION APPROPRIATE TO THE TRANSACTION”,**
[44.11.502](#), ARM



REPORTING EXPENDITURES

- **ALL EXPENDITURES MUST BE REPORTED WITH THE FULL NAME AND ADDRESS OF THE VENDOR, DATE OF THE EXPENDITURE, PURPOSE OF THE EXPENDITURE, AND FULL AMOUNT OF THE EXPENDITURE**
- **INDEPENDENT EXPENDITURES MUST ALSO NAME THE CANDIDATE/S OR ISSUE/S THE EXPENDITURE WAS INTENDED TO BENEFIT**



REPORTING EXPENDITURES

- **“REPORTS OF EXPENDITURES MADE TO A CONSULTANT, ADVERTISING AGENCY, POLLING FIRM, OR OTHER PERSON THAT PERFORMS SERVICES FOR OR ON BEHALF OF A CANDIDATE, POLITICAL COMMITTEE, OR JOINT FUNDRAISING COMMITTEE MUST BE ITEMIZED AND DESCRIBED IN SUFFICIENT DETAIL TO DISCLOSE THE SPECIFIC SERVICES PERFORMED BY THE ENTITY TO WHICH PAYMENT OR REIMBURSEMENT WAS MADE”, [13-37-229\(2\)\(B\)](#), MCA**

ADD AN ATTACHMENT

CAN ADD A RECEIPT, STATEMENT,
OR INVOICE AS AN ATTACHMENT
WHEN REPORTING AN
EXPENDITURE

Report Period

From Date: 03/16/2020 To Date: 04/15/2020

Report Detail Entry

Entity Type: - Please Select -

Election Type: - Please Select -

Date:

Last Name/Vendor Name:

First/Middle Initial:

Address:

City/State/Zip: - Please Select -

Amount: \$

Is this an over contribution limit refund?

Description of Expense:

Is this an electioneering communication?

Platform:

Quantity:

Subject Matter:

Check this box if you have attachments for this transaction

Examples of Paid Communications

1. Newspaper ad in the Helena IR, published xxx/xx/xx only, Description of education platform
2. Facebook post, boosted xxx/xx/xx-xx/xx/xx, "Outdoor rec is vital to MT's economy"
3. Campaign mailer, 5,000 printed and mailed, candidate biography



ADD AN ATTACHMENT

TO ADD AN ATTACHMENT, USE THE 'ATTACHMENTS' TAB

Candidate Campaign Finance Report » (C-5)

Candidate Information

Candidate Full Name: Coffee, J. Election Year: 2020
Mailing Address: PO Box 1234 Helena, MT 59601 Office Sought: County Commissioner

Reporting Period: *From 03/16/2020 *To 04/15/2020

Contributions Expenditures Debts Payments **Attachments** Summary File Help

Attach Files Help

File Name	Description	Reference Date	Reference Type
+ Add Edit Delete View			

Page 1 of 5

Save Exit Upload - Please Select - Download

Edit Attach Files

TIP: Upload PDF files to attach to your report.

Report Period

From Date: 03/16/2020 To Date: 04/15/2020

Attachment Entry

File Name	File Type	Size
+ Add Attachment		
File Name	File Name	
Description	Enter description of attachment	
Reference Date	Reference Date	
Reference Type	- Please Select -	

Save Attachment Cancel

DATE/S of POSTS
When reporting paid social media posts be sure to include date range of paid posts and cost per day, month, period, etc.

PAID SOCIAL POST
Boosted, promoted, sponsored advertisements on social media platforms may be considered election or electioneering communications. Such communications are required to be reported on a campaign finance report

DATE/s & Cost of Boost/Ad

Boosted, Sponsored, Promoted, Advertisement

PURPOSE & SUBJECT MATTER

ATTRIBUTE (Paid for by)

SUBJECT MATTER
As with any expenditure, include the purpose, quantity (in case of social media, date range and cost per range), subject matter, and distinguish between like expenditures.

ATTRIBUTE
All paid social media posts must include the proper attribution (PAID FOR BY). It is recommended you attribute posts likely to be boosted or a later date - include an attribution in the description section of the post for images and videos.

MONTANA
Commissioner of Political Practices

SOCIAL MEDIA EXPENDITURE REPORTING

- **AS WITH ANY OTHER EXPENDITURE, REPORT ALL PAID SOCIAL MEDIA ACTIVITIES**
- **IF CONTRACTED OUT OR PART OF AN AD AGENCY SERVICE, MUST BE ITEMIZED**

REPORTING – DEBTS AND PAYMENTS



ADDING A DEBT

- **DEBT= OBLIGATION OWED BUT NOT YET PAID BY COMMITTEE**
- **UNDER DEBTS TAB, NAVIGATE TO THE 'DEBT/LOAN PAYMENTS' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW DEBT**

The screenshot displays the Campaign Electronic Reporting System (CERS) interface. The main content area shows the 'Committee Campaign Finance Report' for 'Coffee PAC (TEST)'. The 'Debt/Loan Payments' subtab is active, and the 'Add a New Debt' section is visible. A yellow arrow points to the 'Add' button in the 'Add a New Debt' section, which is highlighted with a red star. The 'Add a New Debt' section includes a table with columns: Entity, Election Type, Purpose of Debt, Platform, Quantity, Specific Services, Date, Type, Debt Amount, and Balance Due. Below the table, there are 'Add', 'Edit', and 'Delete' buttons, and a pagination control showing 'Page 1 of 0'.

Entity	Election Type	Purpose of Debt	Platform	Quantity	Specific Services	Date	Type	Debt Amount	Balance Due
No records to view									

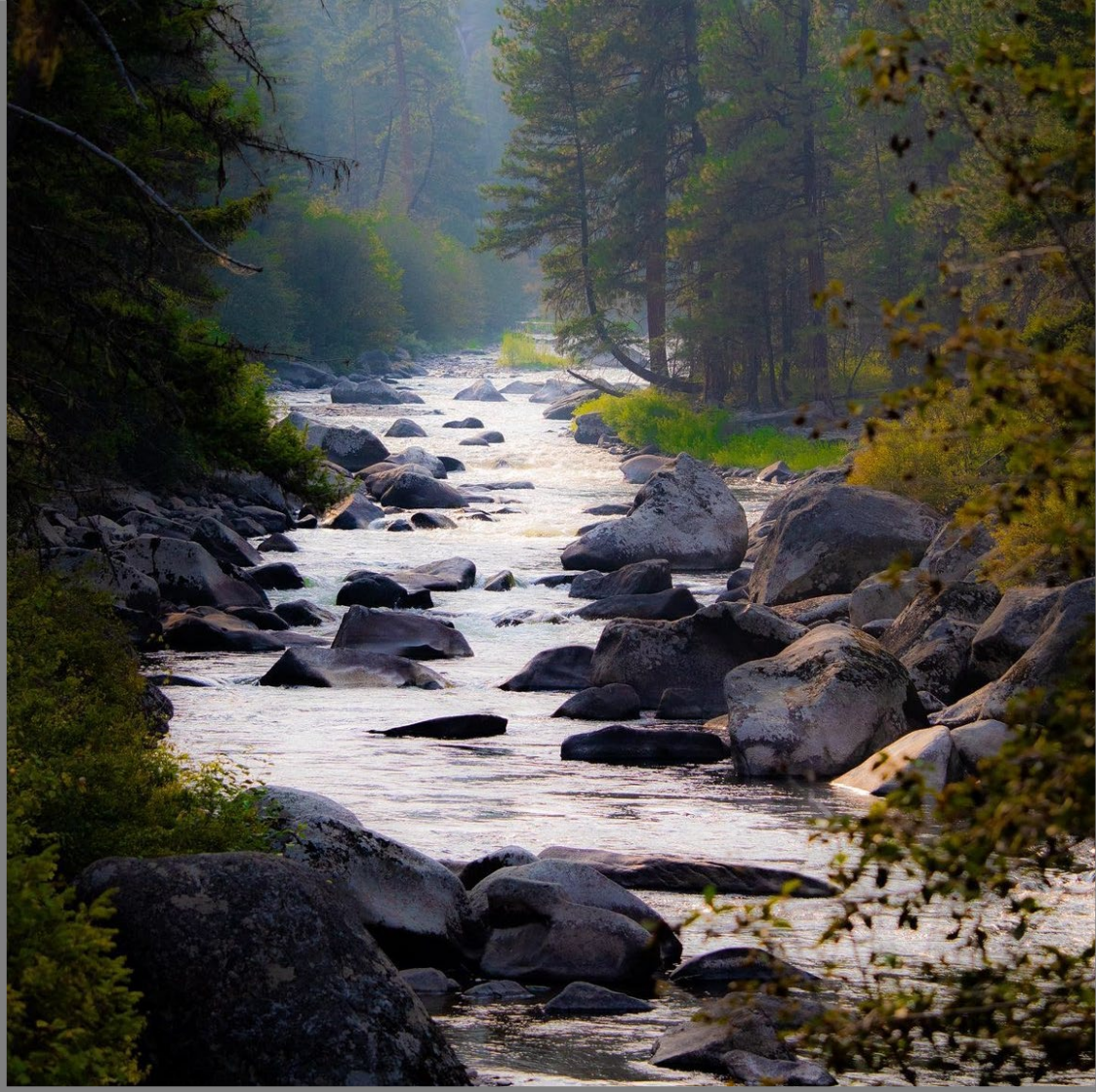
ADDING A DEBT

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR ENTITY**
- **WHEN ALL REQUIRED INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

The screenshot shows the 'Edit Debts' form in the Campaign Electronic Reporting System. The form is titled 'Edit Debts' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)'. The form is divided into two tabs: 'Row Details' and 'Entity Search'. The 'Row Details' tab is active, showing the following fields:

- Report Period:** From Date: 04/26/2020, To Date: 05/25/2020
- Report Detail Entry:**
 - Entity Type: - Please Select -
 - Election Type: - Please Select -
 - Date: Date
 - Last Name/Vendor Name: Individual's Last Name/Vendor's Name
 - First/Middle Initial: First Name, Middle Initial
 - Address: Street Address
 - City/State/Zip: City, - Please Select -, Zip Code
 - Debt Amount: \$ Debt Amount

The form also includes a 'Submit' button and a 'Show all' button. The browser address bar shows the URL: cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport.



DEBTS

- **REPORT DEBTS WITH SAME LEVEL OF DETAIL AS EXPENDITURES**
- **DEBTS OWED BY THE COMMITTEE MUST BE REPORTED AT THE TIME THE OBLIGATION IS INCURRED**
 - **COMMON REPORTING ERROR – WAITING FOR INVOICE TO REPORT**
 - **IF YOU DO NOT KNOW AMOUNT, ESTIMATE (YOU CAN AMEND IF NECESSARY)**

ADDING A PAYMENT

- **PAYMENT= PAYMENT PROVIDED ON A PREVIOUSLY REPORTED DEBT OR LOAN**
- **UNDER PAYMENTS TAB, NAVIGATE TO THE 'PAYMENTS' SUBTAB**
- **SELECT A DEBT OR LOAN TO MAKE A PAYMENT ON, THEN CLICK 'ADD PAYMENT' TO ADD A NEW PAYMENT**

The screenshot displays the 'Campaign Electronic Reporting System' interface. The main content area shows the 'Committee Campaign Finance Report' for 'Coffee PAC (TEST)'. The 'Payments' tab is selected, and the 'Add Payment' button is highlighted with a red star. A yellow arrow points to the 'Payments' tab. The interface includes a navigation menu on the left, a dashboard, and a table for recording payments.

Entity	Date	Type	Debt Amount	Date Paid	Paid Amount	Balance Due
+ Add Payment						

Page 1 of 0 | 5

ADDING A PAYMENT

- **ENTER THE DATE OF THE PAYMENT IN THE 'DATE FIELD'**
- **ENTER THE AMOUNT OF THE PAYMENT IN THE 'PAID AMOUNT' FIELD**
- **WHEN DATE AND PAYMENT AMOUNT INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

The screenshot displays the 'Edit Debt & Loan Payments' form within the Campaign Electronic Reporting System. The form is titled 'Row Details' and includes the following fields and information:

- Report Period:** From Date: 07/16/2021, To Date: 08/14/2021
- Report Detail Entry:**
 - Entity: Coffee, J
1209 8th Ave., Helena, MT 59601
 - Type: Loan
 - Debt Amount: \$15.00
 - Date:
 - Paid Amount:
 - Balance Due: \$5.00

At the bottom of the form, there are 'Submit' and 'Cancel' buttons. Below the form, a table shows reporting period details:

Reporting Period From	Reporting Period To	Date Paid	Paid Amount
05/01/2021	06/15/2021	06/09/2021	\$ 10.00



PAYMENTS

- **PAYMENTS ON OUTSTANDING DEBTS OR LOANS OWED BY THE COMMITTEE ARE REPORTED USING THE 'PAYMENTS' TAB**
 - **OBLIGATIONS DO NOT HAVE TO BE PAID OFF IN FULL ALL AT ONCE- CAN PAY OFF INCREMENTALLY**

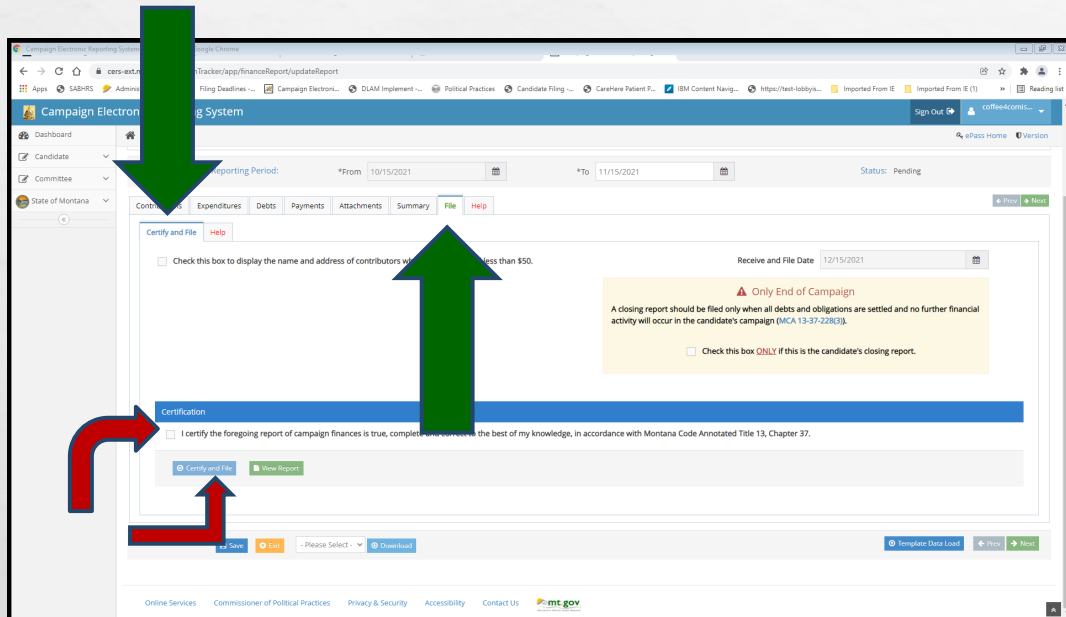
REVIEW

**LET'S NAVIGATE ON CERS - REAL TIME
EXAMPLES**

QUESTIONS FROM PARTICIPANTS



STEP 3: CERTIFY AND FILE THE REPORT



- FROM THE 'FILE' TAB, NAVIGATE TO THE 'CERTIFY AND FILE' SUBTAB
- CERTIFY THE REPORT, THEN CLICK 'CERTIFY AND FILE'
- A REPORT IS NOT FILED UNTIL IT HAS BEEN CERTIFIED AND FILED!

ADDITIONAL ITEMS AND INFORMATION

- **ATTRIBUTION**
- **COMMITTEE TO KEEP RECORDS**
- **INSPECTION REPORTS AND EXAMS**
- **ORDERS OF NONCOMPLIANCE AND FORMAL CAMPAIGN COMPLAINTS**

ATTRIBUTION



- **ALL PAID CAMPAIGN MATERIALS REQUIRE A 'PAID FOR BY' ATTRIBUTION MESSAGE, [13-35-225, MCA](#).**
 - ***INCLUDES ANY PAID SOCIAL MEDIA ACTIVITY!***
- **MUST INCLUDE THE STATEMENT 'PAID FOR BY' WITH THE NAME OF THE COMMITTEE, COMMITTEE ADDRESS, AND NAME OF COMMITTEE TREASURER/OTHER LISTED OFFICER**
- **EXAMPLE: PAID FOR BY MONTANANS FOR COFFEE, PO BOX 1, HELENA, MT 59601. J COFFEE, TREASURER**

ATTRIBUTION WEBPAGE

ATTRIBUTION INFORMATION



Attribution Information
(See [Mont. Code Ann., § 13-35-225](#) and 44.11.601(2), ARM for legal details)

All election and electioneering communications are legally required to include attribution that identifies the entity that paid for the communication.

Who must comply with attribution requirements?

1. Candidates,
2. Committees,
3. Individuals who are not a candidate, and
4. Individuals who are not required to register as a political committee.

To understand how to report paid communications in campaign finance reports, candidates and committees should reference the [Expenditures: Paid Communications](#) page.

FYI: Candidates who run paid advertisements on Facebook are encouraged to include their full "paid for by" attribution message in the "About" section of their Facebook page, so that this information is available for any individual ad when viewed via the Ads Library under "Ad Details." Read the rest of the February 20202 guidance [here](#). The full attribution message should also be provided for paid Facebook ads as:

- a fixed textual component in the body of an ad, or
- a spoken message at the beginning or end of an ad, or
- an image appearing at the beginning of an ad, or
- within the body of a Facebook post that accompanies a paid ad, etc.

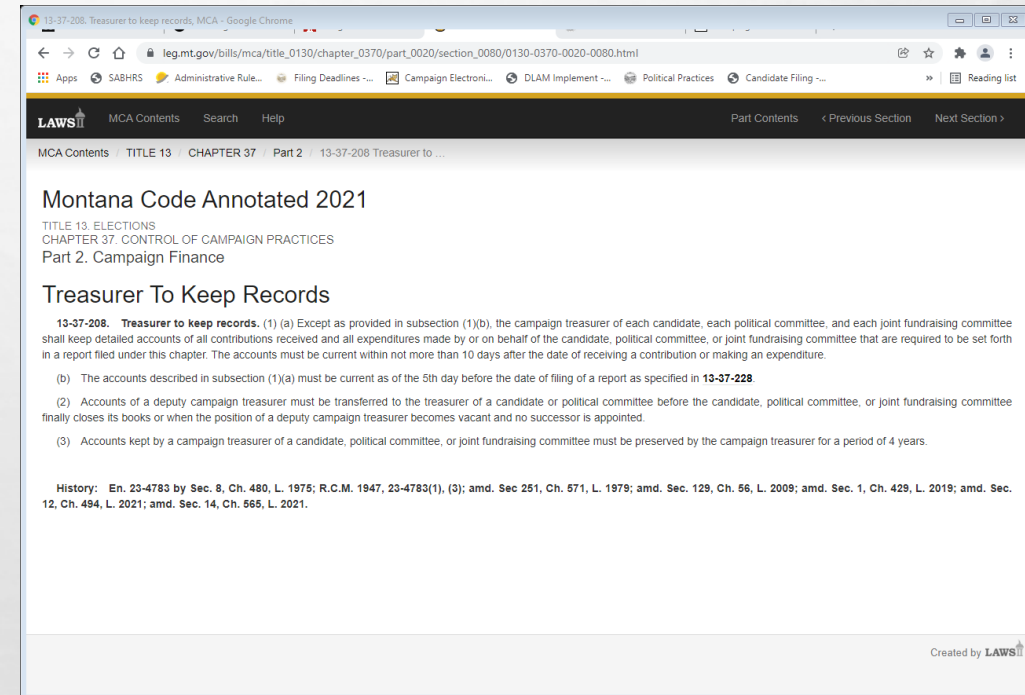
Brochure (web) Brochure (print quality)

- ▶ Attribution Information 101: What is an election communication?
- ▶ What must an attribution say and where must it be placed?
- ▶ Attribution FAQs: Texts and Unattributed Materials
- ▶ Attribution Information for Non-Attributed Materials

<https://politicalpractices.mt.gov/Education-and-Resources/Attribution-Information>

COMMITTEE TO KEEP RECORDS

- **FOR EACH COMMITTEE, THE TREASURER “SHALL KEEP DETAILED ACCOUNTS OF ALL CONTRIBUTIONS RECEIVED AND ALL EXPENDITURES MADE BY OR ON BEHALF OF THE CANDIDATE”, [13-37-208, MCA](#)**
- **RECORDS MUST BE KEPT FOR 4 YEARS!**



INSPECTION REPORTS & EXAMS

- **AFTER A REPORT IS FILED, COPP WILL PROVIDE GUIDANCE WITH CURSORY INSPECTION REPORTS**
 - **MAKE REVISIONS AS REQUESTED**
- **EXAM AT END OF ELECTION CYCLE**
- **IT IS THE COMMITTEE'S ULTIMATE RESPONSIBILITY TO REPORT CORRECTLY AND COMPLETELY**

CFR Compliance -

Campaign Finance Report DATE: 9/14/2017 Inspection Exam

Compliance Specialist: Scott Cook

REFERENCE REPORT: 02/14/17-08/28/17

An initial compliance examination has been completed for the above referenced report. Please review and make all required revision of the following items that may become campaign finance violations. Correct all checked marked and noted items. Should you need assistance please call 406.444.3919 or email cpccompliance@mt.gov. Thank you.

CONTRIBUTIONS Section / Issues		
Section	Item	Explanation / Notes
Individual Contributors	Contributor Ford, Joe E has occupation listed as Consultant	More detail is required as to the occupation of this contributor; please c the specific type of consulting
Individual Contributors	Contributor Martin, Colleen has occupation listed as Fundraiser	More detail is required as to the occupation of this contributor; please c what is meant by Fundraiser
Individual Contributors	Contributor O'Connor, Roy S has occupation listed as Investor	More detail is required as to the occupation of this contributor; please c what is meant by Investor
Individual Contributors	Address missing for contributor Wakimoto, Ronald	Please provide the full mailing address for this contributor, as it is missi report
OTHER:		
EXPENDITURES Section / Issues		
Section	Item	Explanation / Notes
Expenditures: Other	Brock Consulting LLC (5 total entries)	We need more detail for each of the 5 expenditures listed on the report purpose 'Campaign Services'- what were the specific services provided, was the specific purpose of each expenditure?
Expenditures: Other	Monroe, Callie	We need more detail for this expense- what is included in the 'Event Entertainment' descriptor?
Expenditures: Other	United States Post Office (2 entries)	We need more detail as to what was included in the Postage expenditure 04/12/17 and 05/23/17?

CS3 (Scott) Page 1

OTHER:

An initial facial inspection of the campaign finance report found deficiencies based on the information that you have provided to this office. Please correct the deficiencies as soon as possible, and no later than 10 business days from the receipt of this communication.

Jeffrey A. Mangan
Montana Commissioner of Political Practices

EXAMS ONLY:
Failure to do so could result in a campaign finance complaint sufficiency finding, the issuance of an order of noncompliance, or potential enforcement action in state district court.

Jeffrey A. Mangan
Montana Commissioner of Political Practices

CS3 (Scott) Page 2

ORDER OF NONCOMPLIANCE AND FORMAL COMPLAINTS

- **THE COMMISSIONER MAY FILE AN ORDER OF NONCOMPLIANCE COMPELLING COMPLIANCE WITH ALL REPORTING LAWS/RULES**
- **FAILURE TO FILE REPORTS AS REQUIRED OR FULLY/ACCURATELY DISCLOSE CONTRIBUTIONS RECEIVED AND/OR EXPENDITURES MADE MAY LEAD TO A FORMAL CAMPAIGN FINANCE COMPLAINT BEING FILED AGAINST A COMMITTEE**
 - **COMPLAINT PROCESS IS PUBLIC- ANYONE CAN FILE A COMPLAINT**

Phone: 406-444-2942
Fax: 406-444-1643
www.politicalpractices.mt.gov

Campaign Finance and Practices

Complaint Form (08/17)

HAND DELIVERED

SIGNED/NOTARIZED

Type or print in ink all information on this form except for verification signature

Person bringing complaint (Complainant):

Complete Name _____

Complete Mailing Address _____

Phone Numbers: Work _____ Home _____

Person or organization against whom complaint is brought (Respondent):

Complete Name _____

Complete Mailing Address _____

Phone Numbers: Work _____ Home _____

Please complete the second page of this form and describe in detail the facts of the alleged violation.

Verification by oath or affirmation

State of Montana, County of _____

I, _____, being duly sworn, state that the information in this Complaint is complete, true, and correct, to the best of my knowledge and belief.

(SEAL)

Signature of Complainant

Subscribed and sworn to before me this ____ day of _____, _____.

Notary Public

My Commission Expires:

QUESTIONS? CONTACT US!

- [HTTPS://POLITICALPRACTICES.MT.GOV/](https://politicalpractices.mt.gov/)
- EMAIL: CPPHELP@MT.GOV AND CPPCOMPLIANCE@MT.GOV
- PHONE: (406) 444-2942
- FACEBOOK/TWITTER: @MONTANACOPP
- ADDITIONAL RESOURCES:
 - [THE COMMITTEE AND TREASURER GUIDE TO NAVIGATING CERS](#)
 - [ACCOUNTING AND REPORTING MANUAL FOR POLITICAL COMMITTEES \(PINK BOOK\)](#)
- PHOTO CREDIT:
 - SCOTT COOK (SLIDES 22, 23, AND 26)
 - VISIT MONTANA (VISITMT.COM AND FACEBOOK.COM/VISITMONTANA) FOR ALL OTHERS