

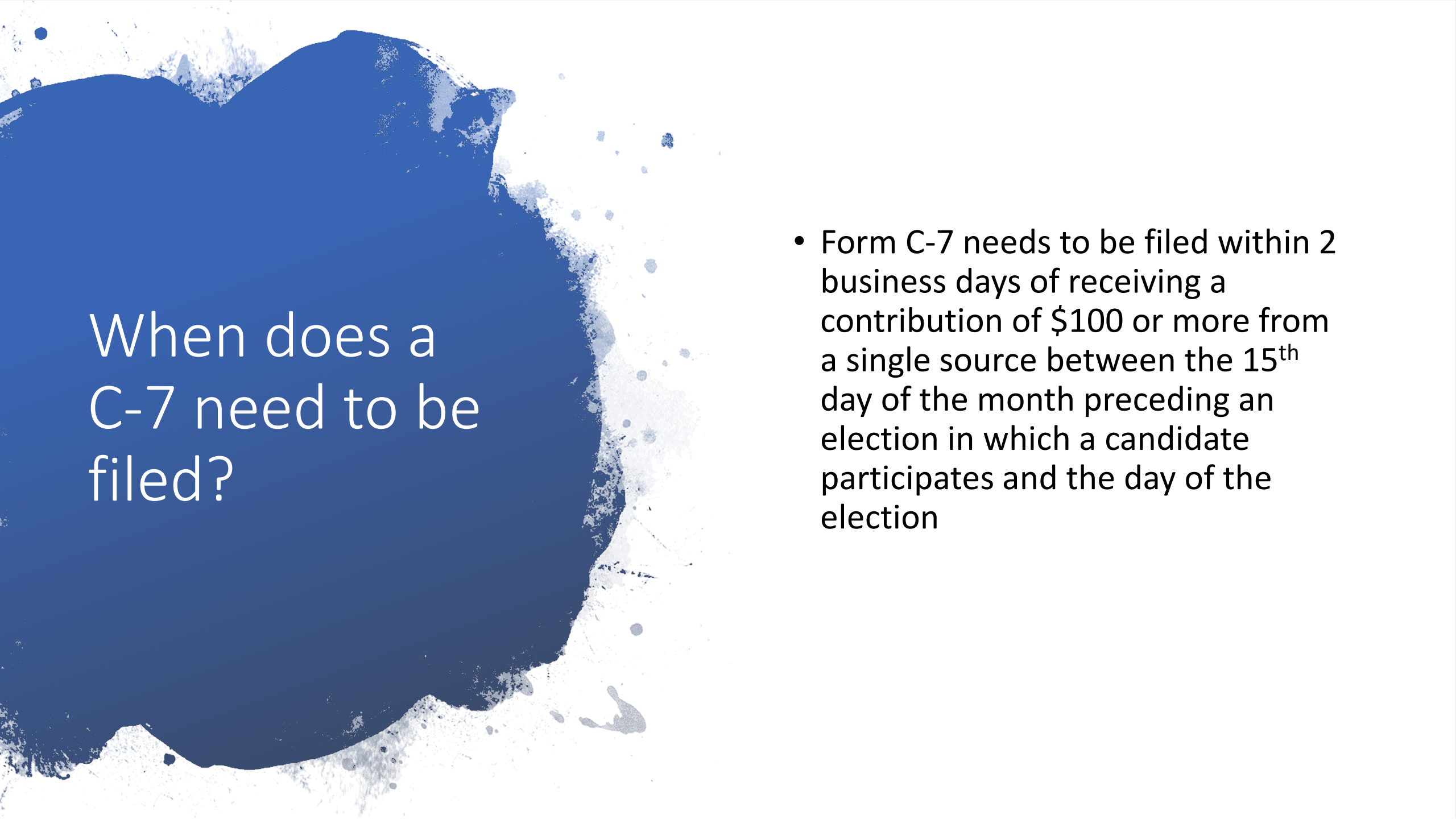
Municipal (city)
candidate C-7/C-7E
training

August 2021

What is a C-7?

- Candidates for elected office are required to disclose contributions of \$100 or more received “between the 15th day of the month preceding an election in which the candidate participates and the day of the election” within 2 business days, 13-37-226(1)(c), Mont. Code Ann.
- Form C-7, the “Notice of Pre-Election Contributions”, is the method candidates use to disclose these contributions

Political Committees are required to file a C-7 for contributions of \$500 or more received between the 25th of the month preceding an election and election day, 13-37-226(2)(c), Mont. Code Ann.

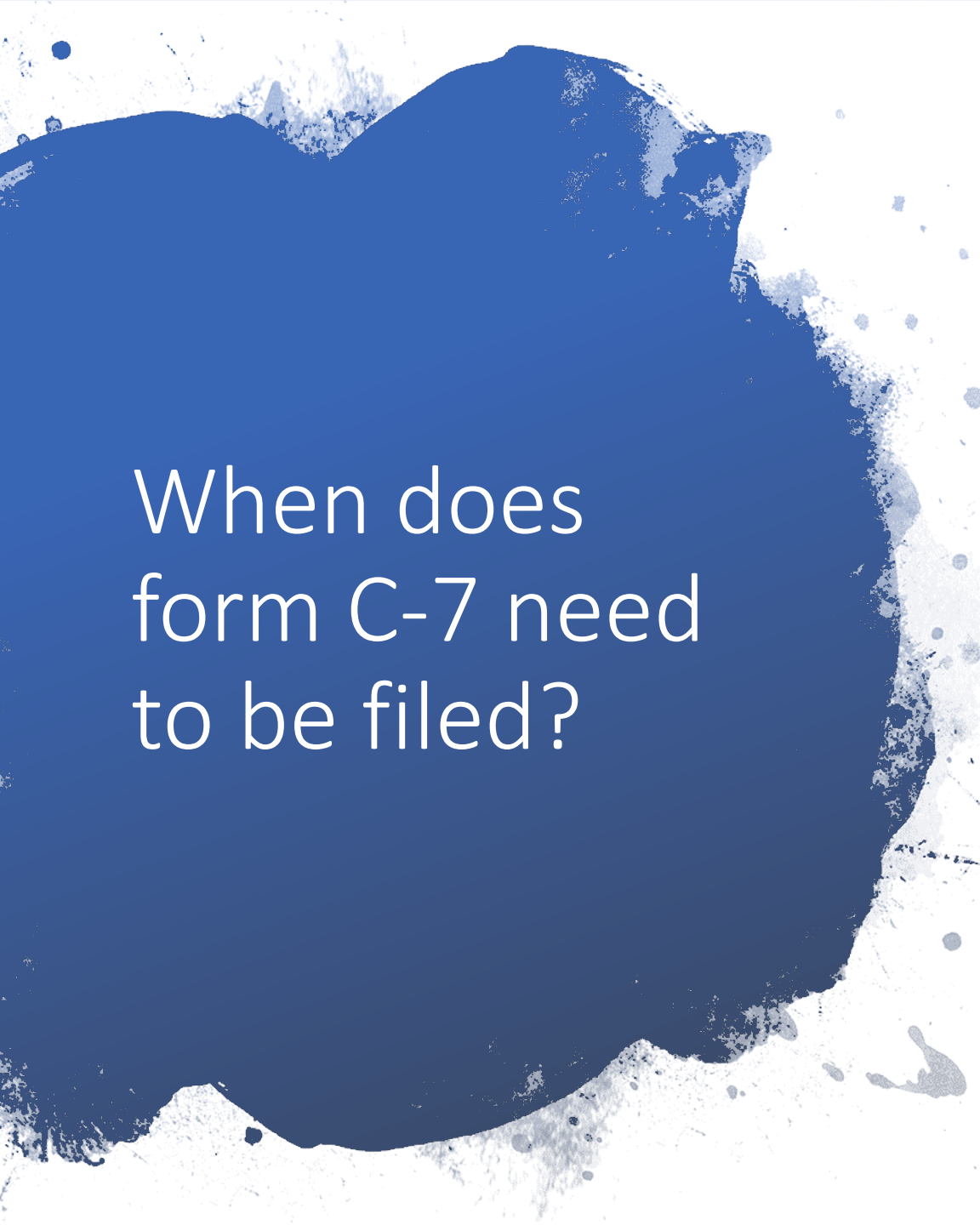


When does a
C-7 need to be
filed?

- Form C-7 needs to be filed within 2 business days of receiving a contribution of \$100 or more from a single source between the 15th day of the month preceding an election in which a candidate participates and the day of the election

When does a C-7 need to be filed?

- If your municipality ***IS*** conducting a primary election, you would be required to file form C-7 as necessary August 15-September 14
- If your municipality is ***NOT*** conducting a primary election, you will not need to file form C-7 August 15-September 14. You may continue to disclose all contributions received via periodic C-5 reports



When does
form C-7 need
to be filed?

- **ALL** candidates will be required to file form C-7 as necessary for the general election period (October 15-November 1)

How do I file a C-7?

- There are three steps to filing a C-7:
 - Step 1: Log into the CERS system and select the 'Add New C7' icon
 - Step 2: Enter relevant contribution/s
 - Step 3: Use the 'File' tab to Certify and File the C-7 report

Step 1- 'Add New C7'

The screenshot shows the Campaign Electronic Reporting System interface. The browser address bar displays `cers-ext.mt.gov/CampaignTracker/app/reportList`. The page title is "Campaign Electronic Reporting System". The user is logged in as "coffee4comis...".

The main content area is titled "Candidate Report List". It includes a search bar and a table with the following data:

	From	To	Report Title	Type	Status	Report
<input type="checkbox"/>	06/16/2021	07/15/2021	Candidate Campaign Finance Report	C5	Amended	Periodic
<input type="checkbox"/>	05/01/2021	06/15/2021	Candidate Campaign Finance Report	C5	Amended	Initial

Below the table, it says "Showing 1 to 2 of 2 entries". At the bottom of the page, there are several buttons: "View Report", "Update or Amend Report", "Add New C7", "Add New C7E", "Go Back", and "Exit". A blue arrow points to the "Add New C7" button, and an orange arrow points to the first row of the table.

Step 2- Enter Contribution/s

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/newC7Report

Campaign Electronic Reporting System

Sign Out coffee4comis...

Dashboard Welcome ePass Home Version

Candidate Campaign Finance Report (C-7)

Candidate Information

Candidate Full Name: Coffee, J Election Year: 2021

Mailing Address: 1209 8th Ave. Helena, MT 59601 Office Sought: Mayor

Reporting Period: *From 08/15/2021 *To 08/16/2021 Status: New

Contributions File Help

Individuals Committee Fundraiser Refunds, Etc Loan Self Help

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

+ Add Edit Delete Page 1 of 0 5

Save Exit Upload - Please Select - Download

Step 3- Certify and File

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/newC7Report

Campaign Electronic Reporting System Sign Out coffee4comis...

Dashboard Welcome ePass Home Version

Candidate Candidate Committee State of Montana

Candidate Campaign Finance Report »(C-7)

Candidate Information

Candidate Full Name: Coffee, J Election Year: 2021

Mailing Address: 1209 8th Ave. Helena, MT 59601 Office Sought: Mayor

Reporting Period: *From 08/15/2021 *To 08/16/2021 Status: Pending

Contributions File Help

Certify and File Help

Check this box to display the name and address of contributors who have contributed less than \$35.

Certification

I certify the foregoing report of campaign finances is true, complete and correct to the best of my knowledge, in accordance with Montana Code Annotated Title 13, Chapter 37.

Certify and File View Report



Tips for filing a C-7!

- The date range on a C-7 should be limited to include only 2 business days
 - Create and file a new C-7 for each 48-hour period as needed



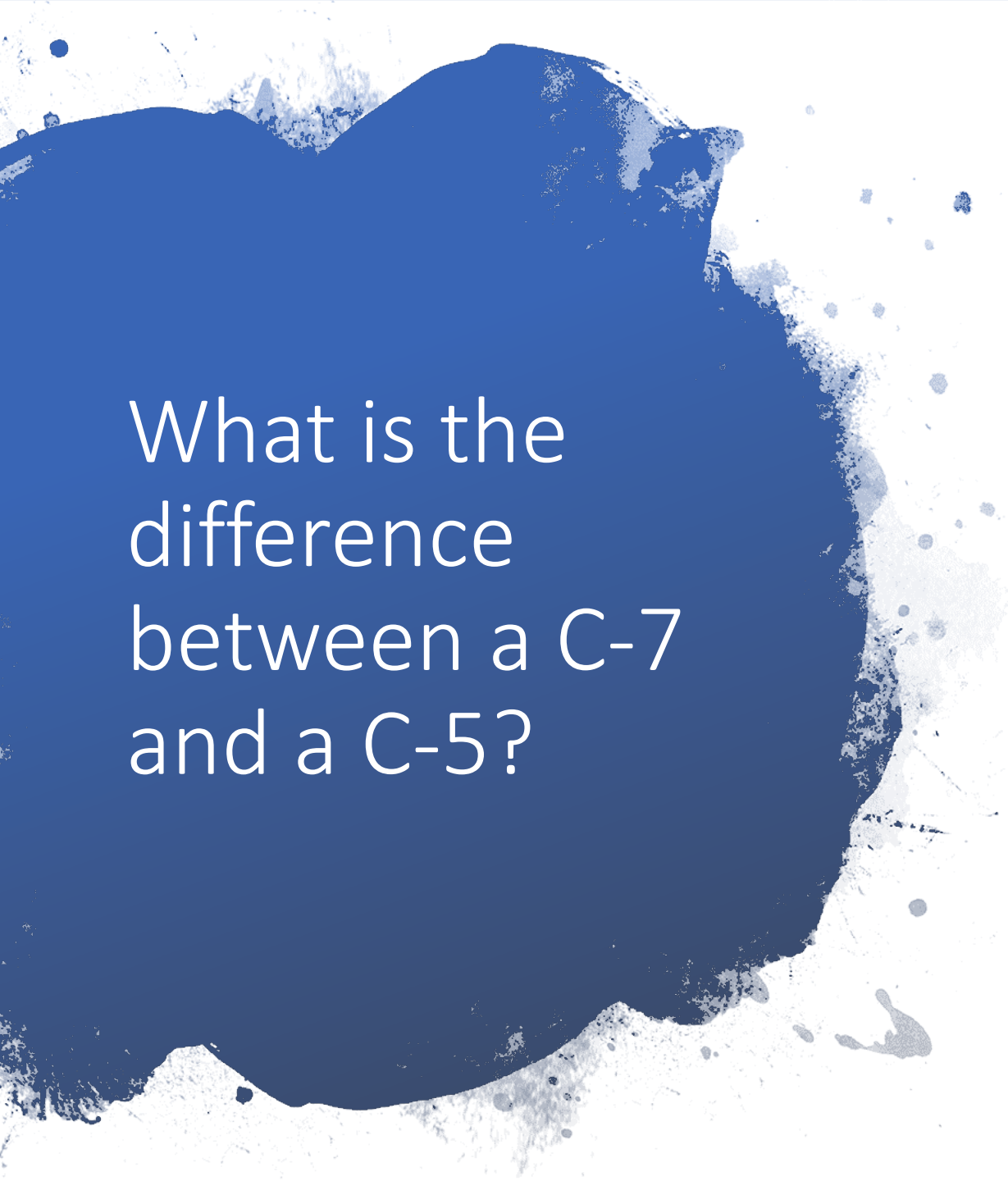
Tips for filing a C-7!

- A C-7 can include contributions received from more than one source
 - All contributions received of \$100 or more within a 48-hour period can be included on one C-7



Tips for filing a C-7

- Remember to include all required contributor information!
 - A contributor's name, address, occupation, and employer must be included on the C-7
 - Describe the specific goods or services contributed in-kind



What is the
difference
between a C-7
and a C-5?

- Form C-7 is the “Notice of Pre-Election Contributions”
 - Only allows for reporting of contributions received
 - Cover only short, 48-hour periods
- Form C-5 is the candidate campaign finance report
 - Allows for reporting of both contributions received ***and*** expenditures made
 - Covers entire reporting period

REVIEW

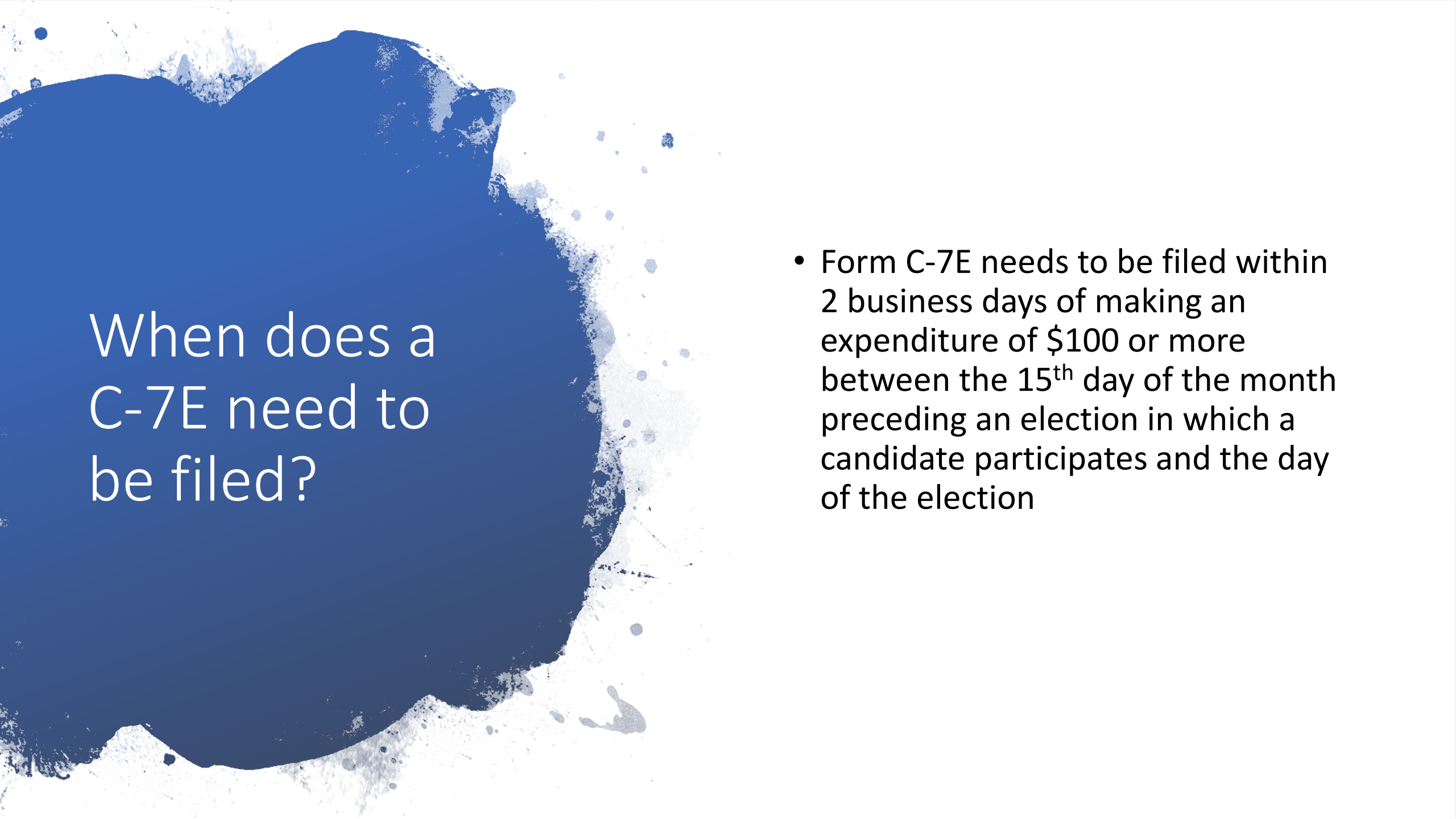
- Questions from participants



What is a C-7E?

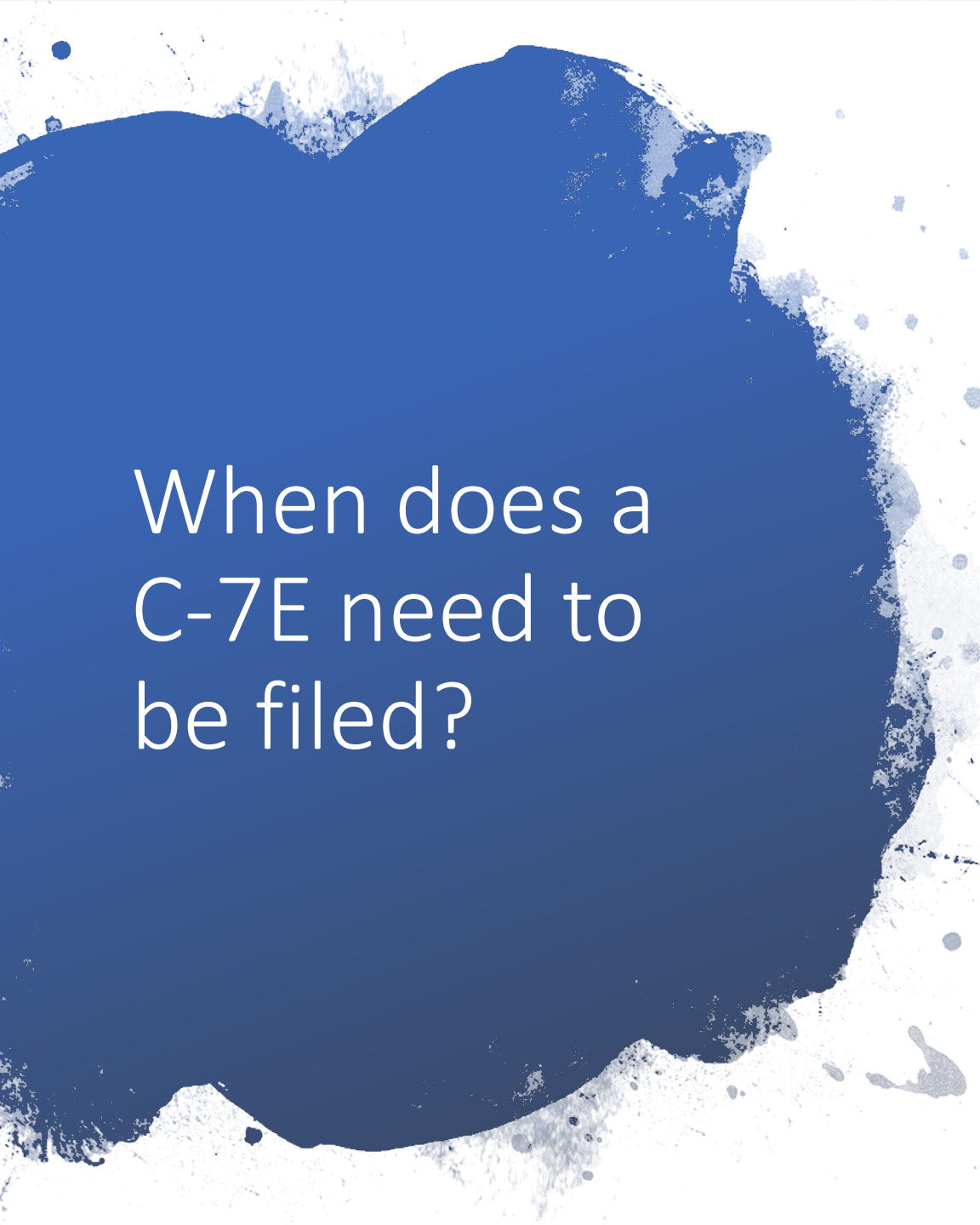
- Candidates for elected office are required to disclose expenditures of \$100 or more made “between the 15th day of the month preceding an election in which the candidate participates and the day of the election” within 2 business days, 13-37-226(1)(d), Mont. Code Ann.
- Form C-7E, the “Notice of Pre-Election Expenditures”, is the method candidates use to disclose these expenditures

Political Committees are required to file a C-7E for expenditures of \$500 or more made between the 25th of the month preceding an election and election day, 13-37-226(2)(d), Mont. Code Ann.



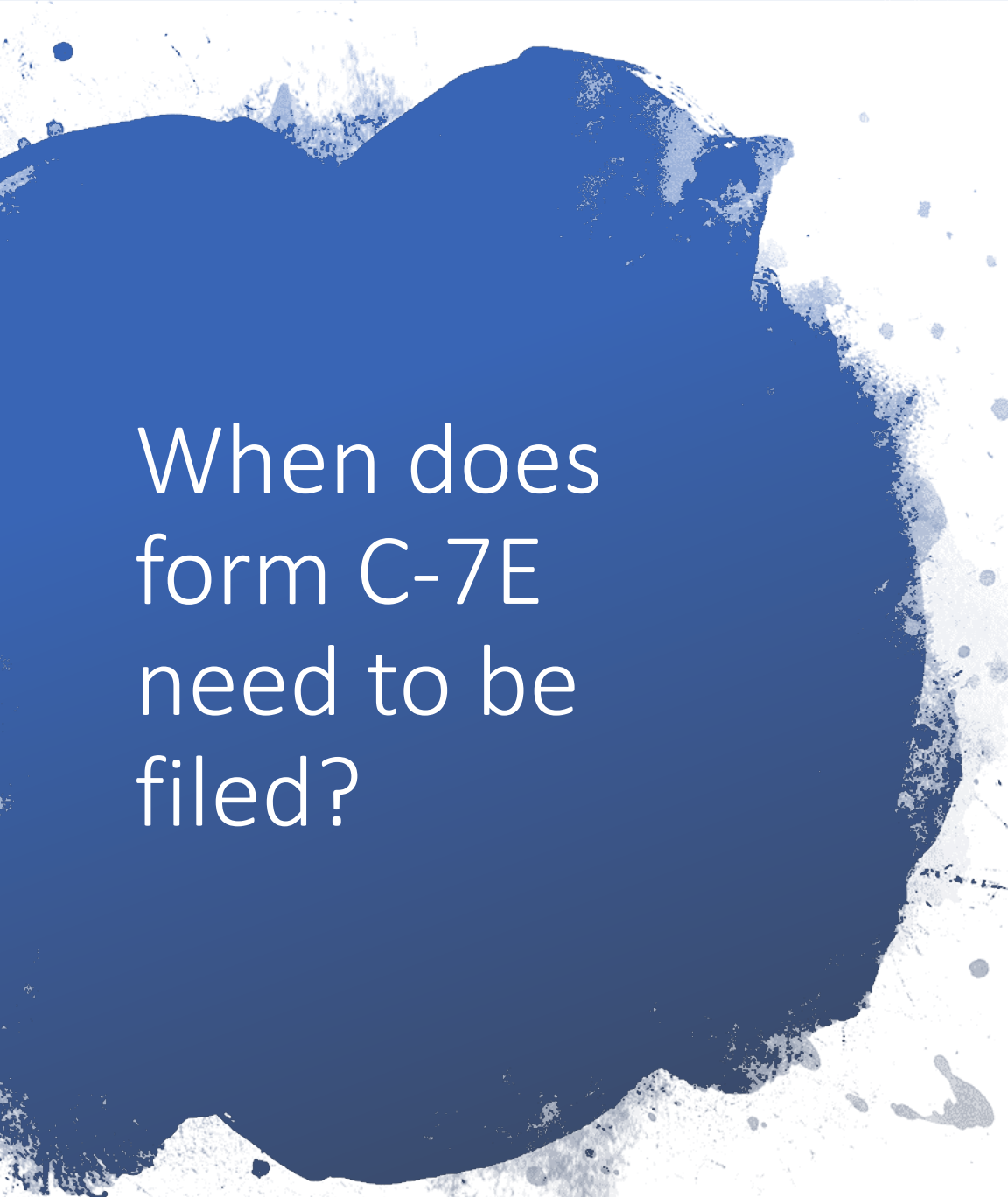
When does a
C-7E need to
be filed?

- Form C-7E needs to be filed within 2 business days of making an expenditure of \$100 or more between the 15th day of the month preceding an election in which a candidate participates and the day of the election



When does a
C-7E need to
be filed?

- If your municipality ***IS*** conducting a primary election, you would be required to file form C-7E as necessary August 15-September 14
- If your municipality is ***NOT*** conducting a primary election, you will not need to file form C-7E August 15-September 14. You may continue to disclose all expenditures via periodic C-5 reports



When does
form C-7E
need to be
filed?

- **ALL** candidates will be required to file form C-7E as necessary for the general election period (October 15-November 1)

How do I file a C-7E?

- There are three steps to filing a C-7E:
 - Step 1: Log into the CERS system and select the 'Add New C7E' icon
 - Step 2: Enter relevant expenditure/s
 - Step 3: Use the 'File' tab to Certify and File the C-7E report

Step 1- 'Add New C7E'

The screenshot shows the Campaign Electronic Reporting System interface. The browser address bar displays `cers-ext.mt.gov/CampaignTracker/app/financeReport/cancel`. The page title is "Campaign Electronic Reporting System". The user is logged in as "coffee4comis...". The interface includes a navigation menu on the left with options: Dashboard, Candidate, Committee, and State of Montana. The main content area shows a "Welcome" message and a "Mailing Address" field with the value "1209 8th Ave. Helena, MT 59601". Below this is an "Instructions" section with three bullet points: "To add a new report, click the button below that corresponds to the report you wish to file (e.g. Add New C5, Add New C7). If multiple candidate accounts exist, you must check the box next to the relevant candidate 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.", and "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." Below the instructions is a "Candidate Report List" section with a "Display 5 records" dropdown and a search field. The table below shows two entries:

	From	To	Report Title	Type	Status	Report
<input type="checkbox"/>	06/16/2021	07/15/2021	Candidate Campaign Finance Report	C5	Amended	Periodic
<input type="checkbox"/>	05/01/2021	06/15/2021	Candidate Campaign Finance Report	C5	Amended	Initial

Showing 1 to 2 of 2 entries

At the bottom of the page, there are several buttons: "View Report", "Update or Amend Report", "Add New C7E", "Go Back", and "Exit". A blue arrow points to the "Add New C7E" button, and an orange arrow points to the "Add New C7E" button from the table area.

Step 2- Enter Expenditure/s

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/newCandidateC7eReport

Campaign Electronic Reporting System

Sign Out coffee4comis...

Dashboard Welcome ePass Home Version

Candidate Information

Candidate Full Name: Coffee, J Election Year: 2021

Mailing Address: 1209 8th Ave. Helena, MT 59601 Office Sought: Mayor

Reporting Period: *From 08/15/2021 *To 08/16/2021 Status: New

Expenditures Attachments File Help

Expenditures Help

Entity	Election Type	Description of Expense	Electionee ring	Ref und	Platform	Quantity	Subject Matter	Attachme nt	Date	Amount
No records to view										

Add Edit Delete

Page 1 of 0 5

Save Exit Upload - Please Select - Download

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Step 3- Certify and File

The screenshot displays the 'Candidate Campaign Finance Report' (C-7E) form in the Campaign Electronic Reporting System. The form includes the following fields:

- Candidate Information:**
 - Candidate Full Name: Coffee, J
 - Election Year: 2021
 - Mailing Address: 1209 8th Ave, Helena, MT 59601
 - Office Sought: Mayor
- Reporting Period:**
 - *From: 08/15/2021
 - *To: 08/16/2021
 - Status: Pending

The 'Certify and File' section contains a certification checkbox and two buttons:

- I certify the foregoing report of campaign finances is true, complete and correct to the best of my knowledge, in accordance with Montana Code Annotated Title 13, Chapter 37.
- [Certify and File](#) (highlighted with a blue arrow)
- [View Report](#) (highlighted with an orange arrow)



Tips for filing a C-7E!

- The date range on a C-7E should be limited to include only 2 business days
 - Create and file a new C-7E for each 48-hour period as needed



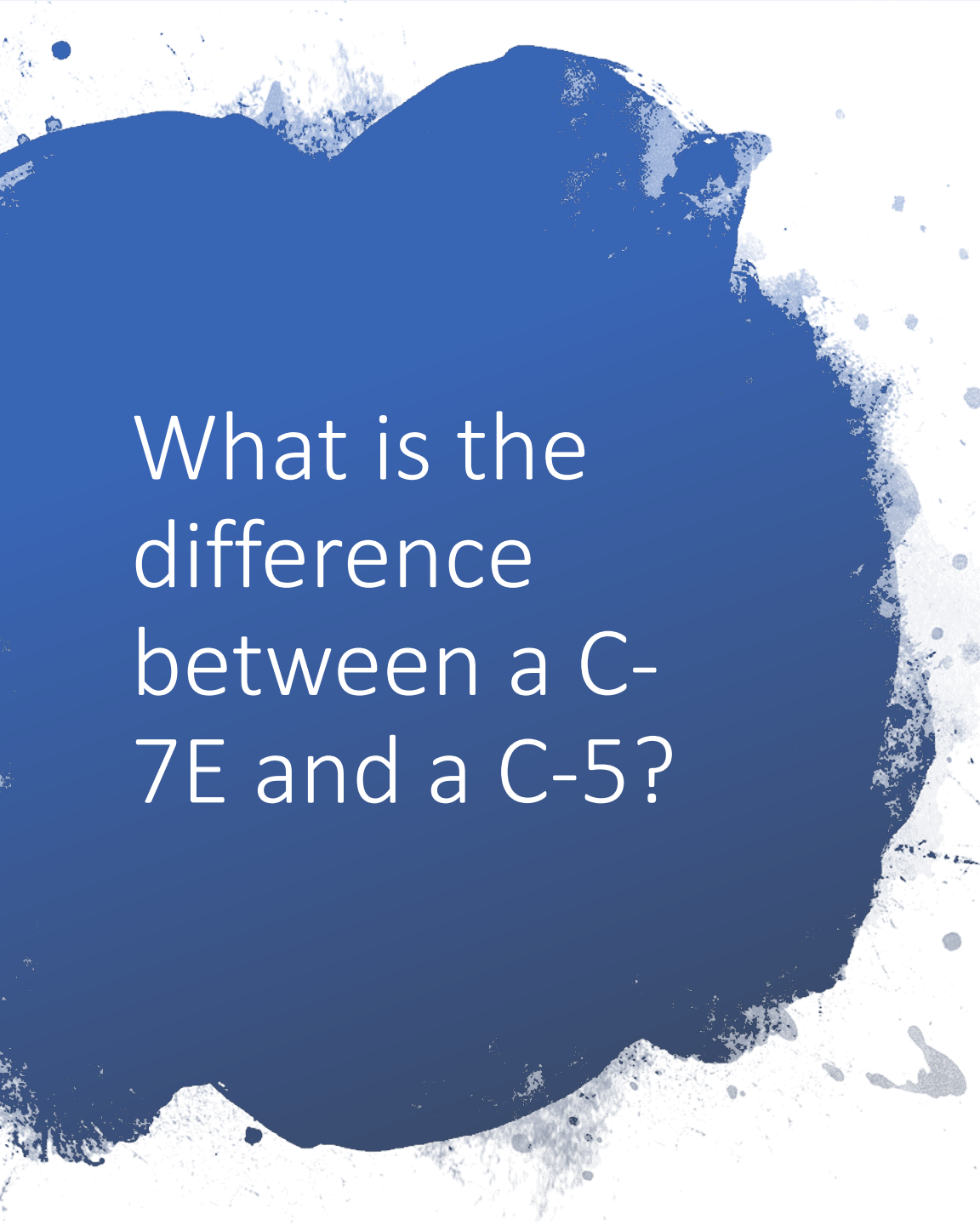
Tips for filing a C-7E!

- A C-7E can include more than one expenditure made!
 - All expenditures made of \$100 or more within a 48-hour period can be included on one C-7E



Tips for filing a C-7E!

- Remember to describe expenditures with all required detail on a C-7E!
 - Expenditures “made to a consultant, advertising agency, polling firm, or other person that performs services for or on behalf of a candidate” must be “itemized and described in sufficient detail to disclose the specific services performed”, 13-37-229(2)(b), Mont. Code Ann.



What is the
difference
between a C-
7E and a C-5?

- Form C-7E is the “Notice of Pre-Election Expenditures”
 - Only allows for reporting of expenditures made
 - Cover only short, 48-hour periods
- Form C-5 is the candidate campaign finance report
 - Allows for reporting of both contributions received ***and*** expenditures made
 - Covers entire reporting period

REVIEW

- Questions from participants



2021 municipal (city) primary election

- August 15: primary election C-7 and C-7E periods begin
 - File form C-7 within 2 business days if a \$100 contribution from a single source is received between August 15 and primary election day
 - File form C-7E within 2 business days if an expenditure of \$100 or more is made between August 15 and primary election day
 - Applicable only to candidates whose municipality is conducting a primary election

Changes coming
to C-7/C-7E
period that will
apply to the
municipal (city)
general election!

- Senate Bill 224, passed by the 2021 Montana Legislature and signed into law, will change the C-7/C-7E requirements
 - Amount triggering a C-7/C-7E will be raised to \$125 (from current \$100)*
 - The C-7/C-7E filing period will be changed to end on the day before an election (currently runs through election day)
 - Neither bookkeeping expenses paid for campaign reporting/compliance or payroll expenses will need to be included on a C-7/C-7E. These expenses will still need to be disclosed on the relevant C-5 report!

*Amount changed to \$250 for candidates for Statewide office

Changes coming
to C-7/C-7E
period that will
apply to the
municipal (city)
general election!

- SB 224 takes effect on October 1, 2021.
Will apply to the municipal (city)
November general election
- **SB 224 does not apply to the
September primary!**

2021 municipal (city) general election

- October 15: general election C-7 and C-7E period begins
 - File form C-7 within 2 business days if a contribution of \$125 or more is received from a single source is received between October 15 and November 1
 - File form C-7E within 2 business days if an expenditure of \$125 or more is made between October 15 and November 1
 - Applicable to all candidates!

Reminder!

- Periodic C-5 campaign finance report due on or before August 20, 2021!
 - Report needs to disclose all contributions received and expenditures made between July 16, 2021 and August 14, 2021



Questions?
Contact Us!

- <https://politicalpractices.mt.gov/>
- Email: cpphelp@mt.gov and cppcompliance@mt.gov
- Phone: (406) 444-2942
- Facebook/Twitter: @MontanaCOPP