

Candidate Guide to Navigating the Campaign Electronic Reporting System (CERS)

File Edit View Favorites Tools Help

Campaign Electronic Reporting System

Dashboard Welcome

Candidate

Committee

State of Montana

Welcome to the Campaign Electronic Reporting System Dashboard » Sign in to get started.

News and Information

On-line reporting will be **required** for all statewide candidate campaigns, state district candidates (legislature, district court judge, and public service commission), and all political candidates. Scott, Karen and Noah work extremely hard at making your on-line reporting experience a positive one. If at any time you need assistance feel free to contact our office. We can be reached at 444-2942 or at cphelp@mt.gov.

CERS is a user-friendly system that aides in tracking things like total-to-date, contribution limits, and other required reporting information. Users will receive notifications of missing information prior to filing a report. This step could reduce the headache of having to deal with the formal complaint process during your busy campaign season.

Reporting calendars and other helpful information is available on the website at www.politicalpractices.mt.gov.

Good luck with your campaigns!

Instructions for new candidate registration

- Once you request to register a new candidate, there will likely be a time-lag while the request is evaluated by one of us at CPP. Once your request is approved, an email will be sent to you. If you would like to hurry this process along, send me an email ([Contact Us](#)) letting us know you've entered a request to register.

⚠ Don't use your browser 'back' or 'forward' buttons to move among pages. Use the buttons you will find within the service to ensure the process completes properly.

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Introduction to the Campaign Electronic Reporting System

What is the Campaign Electronic Reporting System (CERS)?

CERS is a user-friendly system that helps candidates and committees disclose and report the money they receive and spend to support or oppose candidates and ballot issues.

Montana's campaign finance laws ensure that the public can engage with a transparent reporting of money in elections. CERS makes campaign finance reports publicly available. Candidates and committees ensure transparency in Montana's democratic processes by periodically filing legally-required campaign finance reports.

The COPP reviews all financial reports filed by candidates and committees ([13-37-121\[1\]](#), MCA). COPP Compliance Specialists are available full-time during work hours (8:00 am to 5:00 pm, Monday-Friday) to provide campaign finance reporting support to candidates and committees.

Who must use CERS to register and for campaign finance reporting?

All candidates* are required to use CERS to file their campaign finance reports.

When you file a Statement of Candidate in CERS, you must first create a CERS account. This same account will be used to enter campaign finance reports. Creating a CERS account and filing a Statement of Candidate is detailed below in Part 1.

**2019 candidates for election to municipal (city) offices are exempt from this requirement. While use of the CERS system of electronic reporting is encouraged and welcomed for these candidates, it is not required.*

Part 1: Create an Account and File a Statement of Candidate

Step 1: Access ePass and Create a User Login

- To register a candidate or a candidate’s campaign using the CERS system, you will first need to log into the CERS system ([Guide to Registering as a Candidate](#)). Access the CERS database through <https://camptrackext.mt.gov/CampaignTracker/dashboard>. This link is also available at the COPP’s [Online Services](#) page, through the “Access the Campaign Electronic Reporting System (CERS)” link.
- From the CERS dashboard, select the **Access my Accounts** icon. This will take you to the ePass Montana login page.
- Login via ePass Montana. If you already have an active ePass Montana account, you may log in using that username and password. If you do not already have an active ePass account or cannot remember your login information, ePass gives you the option to create a new account (See the text: *If you do not have an account, you can create one [here](#)*).
- After you successfully login via ePass, you will automatically be redirected back to CERS. If you have successfully logged in, you will see your username in the upper right corner in CERS.

After logging in, you will see the below image. To register a new candidate or campaign, make sure you have selected the **Candidates** tab, and then click **Add new registration**.

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

Candidates Committees Access ID Search

Candidate List

Display 5 records Search:

| | Candidate Name | Year | Status | C-3 | Address | Campaign | Office | County |
|--------------------------|----------------|------|--------|-----|---------------------------------------|----------------|-----------------------|---------------|
| <input type="checkbox"/> | [REDACTED] | 2019 | Closed | Yes | 123 MailingAddress, Helena, MT 59601 | City | City Treasurer | Lewis & Clark |
| <input type="checkbox"/> | [REDACTED] | 2018 | Active | No | 1234 Big Dreams Way, Helena, MT 59601 | State District | House District No. 01 | Lewis & Clark |

Showing 1 to 2 of 2 entries

« < 1 > »

✓ Add New Registration ✓ View Registration ✓ Amend Registration ✓ File/View C-3 ✓ Finance Reports

Step 2: Determine if Your Candidate Name Already Exists in CERS. If Needed, Register Name

The screenshot shows the CERS Candidate Search interface. It features a navigation bar at the top with 'Candidates', 'Committees', 'Access ID', and 'Search'. A sidebar on the left contains 'Candidate Search', 'Committee Search', 'Contribution Search', and 'Expenditure Search'. The main area has input fields for 'Last Name', 'First Name', 'Middle Initial', and 'Election Year'. At the bottom, there are three buttons: 'Add New Registration' (highlighted in yellow), 'Search Candidate', and 'Reset'.

Before you can add a new registration, the CERS system requires you to search for the candidate's name in case the candidate already created a candidate CERS account. To search:

1. Fill out the **Candidate** name and the election year.
2. Then, click the **Search Candidate** button.
 - *If the candidate previously registered* in the CERS system for a prior election year, select that candidate by clicking the box to the left of the prior registration for that candidate, and select the **Add New Registration** icon.
 - *If the candidate's name does come up* for the current election year, that means that the candidate has already registered in the CERS system for that current election year. If this is the case, ***please contact the COPP for assistance accessing the existing account*** instead of creating a second profile.
 - *If the candidate's name does not come up* from a search, click **Add New Registration** to add a new registration for that candidate for the current election year.

Step 3: Enter in Your Candidate Campaign Information

1. Click the upper dropdown option from the Statement of Candidate form and select your **Campaign Type** (City, County, School, State District, or Statewide).
 - a. Are you uncertain which specific office you will run for? Read about your options for filing as an exploratory candidate [here](#).
2. Fill out all information in the **Candidate Information** section.
 - a. In the section for **Affidavit of Reporting Status** (***city, school, and county candidates only***), select the correct 'box' designation. Choose B box for campaigns that will spend and receive under \$500 combined, or C box for campaigns that will spend and receive over \$500 combined.
3. Fill out information in the **Campaign Treasurer Information** section.
 - a. A treasurer must be appointed and certified on the Statement of Candidate form. Candidates can appoint themselves to be their own treasurers. If there are changes, an amended candidate statement (C-1 or C-1A form) must be submitted within 5 days.
 - b. Treasurers are responsible for depositing and disbursing funds and keeping accurate accounts. The treasurer and deputy treasurer are the only people authorized to make deposits or draw checks on the campaign account.
 - c. Often candidates appoint themselves as either treasurer or deputy treasurer so they have access to their campaign accounts.
4. If relevant to your campaign, fill out the **Deputy Treasurer Information** section. Not all campaigns will have a Deputy Treasurer. You will need to select the purple **Add** button, enter in the deputy treasurer's information, and click **Submit**.
5. When all candidate information is entered, select **Save** at the bottom of the page.
6. Verify all candidate information is correct. If you need to make edits, click the **Edit Information** button, update info, and then click **Save**.
7. Certify all information is true by clicking the **Certification** box at the bottom of the page.
8. Select **Submit and File**.
9. You will now receive an email verifying your successful filing to the email address you provided.
10. You have the option to file a Form C-3 ([Code of Fair Campaign Practices](#)) in CERS. Any candidate who desires to subscribe to the Code of Fair Campaign Practices may file a Form C-3. Signing the form is voluntary, and a failure or refusal to sign is not a violation of election laws.
11. You will now be able to navigate back to your [CERS homepage](#). From this page, you can:
 - a. Add a new registration or campaign finance report,
 - b. View your registration,
 - c. Amend your candidate statement or a campaign finance report,
 - d. File and view C-3, and
 - e. Create a finance report (Finance Reports).

Step 4: How to Update a Statement of Candidate

If any of the information in a candidate's statement of candidate changes, the candidate must file an amended form providing the new information within five days after the change is occurs ([13-37-204, MCA](#), [44.11.303\(2\), ARM](#)).

Your candidate registration must be updated in CERS if any of the below information changes:

- The campaign type,
- Candidate contact information (address, email, phone number, etc.),
- Political party,
- Bank information, and the
- Treasurer or deputy treasurer information.

To amend a candidate's registration, navigate to the CERS' homepage, and login via ePass Montana. Then, check the box next to the candidate's name to select their current registration, and click **Amend Registration**. Edit and amend the relevant information in the candidate's Statement of Candidate. Then, check and certify that the registration information is true, complete, and correct, and then select **Submit and File** to save the updates.

Part 2: Create a Campaign Finance Report

Select the Campaign Finance Report Type (C-5 or C-7) and Set the Reporting Period

Once logged in to CERS, candidates can easily file campaign financial reports. Simply select the candidate campaign account for the relevant election year and select the blue **Finance Reports** button. From the following page, select **Add New C5** to add a new campaign financial report or **Add New C7** to add a new Notice of Pre-Election Contributions (Form C7 is only required to be filed for certain contributions received in the immediate runoff to an election. For details, -see [here](#) and [here](#) for more information).

Before you create a new campaign finance report, remember that:

- A new campaign finance report cannot be created if a prior report is pending.
- A candidate accesses their accounts through the candidate dashboard. This page will also list all campaign finance reports previously filed by the candidate. These finance reports can be amended at any time (See Part 9 for details on amending reports).

After creating a new finance report, select the date range the report will cover using the dropdown calendar option (see image below). This time period must mirror the reporting periods as defined on the [COPP's reporting page](#). The time period covered by the report includes up to the fifth day before the due date of the appropriate report. All accounts must be current up to the fifth day before the report due date.

The screenshot displays the CERS reporting interface. At the top, there is a 'Reporting Period:' section with '*From' and '*To' date fields. A calendar dropdown is open, showing the month of July 2019. The calendar grid has columns for days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and rows for dates. The date '8' is highlighted. Below the calendar, there are tabs for 'Candidate', 'Loans', 'Fundraisers', 'Committee', and 'Individual'. There are also fields for 'Election Type' and 'In-Kind Descr'. At the bottom of the interface, there are buttons for 'Save', 'Exit', 'Upload', and 'Download', along with a '- Please Select -' dropdown menu. The page number 'Page 1 of 0' is visible at the bottom right.

Campaign finance information is entered into the CERS system by candidates or treasurers via the following tabs (The functions and purposes of each tab are detailed in Part 3):

1. Schedule A: Contributions

By law ([13-1-101\(9\), MCA](#)), a contribution is defined as a “...distribution of money or anything of value to support or oppose a candidate or ballot issue.” If an individual, political committee, or other entity provides a campaign with money or goods or services of value for free or at a reduced rate to support your candidacy, that would be considered a contribution. In **Schedule A**, report: 1) candidate contributions (contributions made by the candidate to their own campaign), 2) loans, 3) fundraisers, 4) committee contributions, and 5) individual contributions (contributions made by individuals other than the candidate).

2. Schedule B: Expenditures (Expenses)

By law ([13-1-101 \(17\) \(a\), MCA](#)), an expenditure is defined as “a purchase, payment, distribution, loan, advance, promise, pledge, or gift of money or anything of value made by a candidate or political committee to support or oppose a candidate or ballot issue.” Expenditure details must be disclosed in **Schedule B** using the **Other Expend** subtab. An expenditure is any money a campaign spends in support of that candidate, with limited exceptions (see [13-1-101 \(18\) \(b\), MCA](#)).

3. Schedule C: Debts

A candidate must report the full name and mailing address of each person or entity to whom the campaign owes a debt or financial obligation. Debt details must include: the amount, the date the debt or obligation was contracted, and the purpose of the debt or contracted obligation. If the exact amount is unknown at the time of filing, the estimated debt amount must be reported (see [44.11.506 ARM](#)).

4. Payments

A candidate must report information about all payments made on the campaign’s outstanding debts or loans in the **Payments** tab. In this tab, previously reported debts or loans can be selected to record payments.

5. Summary

The **Summary** tab keeps a running total of money received and spent by the campaign during the current reporting period. The summary details the campaign’s bank balance at the start of the reporting period, all reported contributions received by the campaign, total campaign expenses, and the ending bank balance for both the primary and general election accounts.

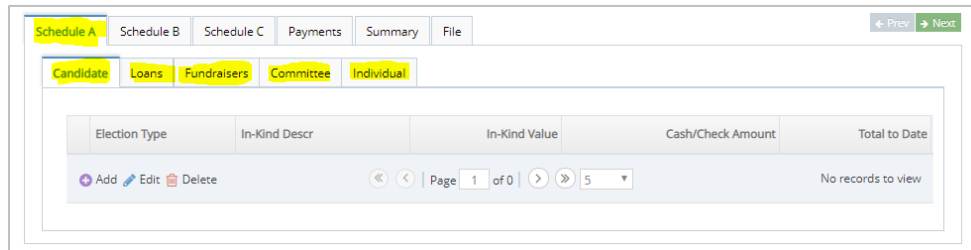
6. File

The **File** tab is where the final steps of filing a campaign finance report are completed. To file a report, check the box to certify that all information is correct, and then click the “Certify and File” button.

Part 3: Add Contributions (Schedule A) in CERS

Types of Contributions

Contributions can come from individuals, committees (political committees, political action committees (PACs), and political party committees), and the candidate. [Contributions limits](#) exist for both a primary and general election and apply to all contributions received from committees or individuals (candidate contributions to their own campaign are exempt from contribution limits. If a candidate does not have a primary election, they can receive contributions *only* for the general election.



The screenshot shows the CERS interface for adding contributions. At the top, there are tabs for Schedule A, Schedule B, Schedule C, Payments, Summary, and File. Below these are subtabs for Candidate, Loans, Fundraisers, Committee, and Individual. The main area contains a table with columns for Election Type, In-Kind Descr, In-Kind Value, Cash/Check Amount, and Total to Date. Below the table are buttons for Add, Edit, and Delete, and a pagination control showing Page 1 of 0. A message at the bottom right states "No records to view".

Enter contributions based on the relevant **Schedule A** subtab:

1. Candidate Contributions

Enter in information about the candidate's contributions (both monetary and in-kind) to their own campaign in the **Candidate** subtab. Candidate contributions would only include personal funds given to the campaign for which the candidate will not seek reimbursement. Candidates should record personal funds given to the campaign as loans to the campaign if they will seek reimbursement.

2. Loans

By definition, any loan to a campaign is a contribution ([ARM, 44.11.405](#)) and all contribution limits apply. Any loan (regardless of its amount) made to the campaign during the current reporting period is reported in the **Loans** subtab, even if the loan is repaid during the same reporting period. A candidate must report personal loans made to their campaign in this subtab (reference [this step-by-step guide](#)).

3. Fundraisers (and rebates, refunds, and interest)

Enter in contributions received from fundraisers, rebates (e.g. if a candidate was invoiced for a project and the total was less than originally paid), refunds, and interest (e.g. from a bank account) in the **Fundraisers** subtab.



The screenshot shows the 'Edit Interest, Rebates, Refunds, and Fundraisers' subtab. It features a search bar with 'Entity Search' and 'Row Details' options.

- To report contributions from a fundraiser or mass collection event (pass the hat, auction event, raffle, etc.), the following information must be disclosed: Whether the contributions received at the event go to the candidate's primary or general account, the date and location of the event, the type of event, the approximate

number of attendees, the number of tickets sold (if relevant), and the total amount raised ([44.11.406 ARM](#)). Any individual contributions of \$35 or more received at a fundraiser event must be reported using the **Individual** subtab in Schedule A.

- Contributions of \$35 or less received at mass collection events may be recorded and reported in the **Fundraiser** subtab as one lump sum entry.
- Each individual fundraising event held by the campaign must be reported separately.
- Remember: Anonymous contributions are illegal. The source of contributions from a fundraiser must always be recorded, even if an individual's fundraising-related contribution does not meet the \$35 reporting threshold. If the source of a contribution received is not known, that money must be donated to a nonprofit organization.

4. Committee

Contributions received from a political committee must be entered in the **Committee** subtab.

- Committee contribution details must include: whether the contribution is designated for the primary or general election, the date the contribution was received, information about the committee (the committee type, name, and the address), and whether the contribution was a monetary or in-kind contribution.
- All in-kind contributions must include a description of the specific items or services received by the campaign.
- [Committee contribution limits](#) apply and aggregate contributions are tracked and displayed in CERS.

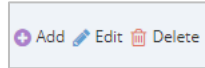
5. Individual

Contributions received from individuals must be entered in the "Individuals" tab.

- Individual contribution details must include whether the contribution is designated for the primary or general election, the date the contribution was received, information about the individual (name, address, employer and occupation are required for individuals who contribute \$35 or more), and whether it was a monetary or in-kind contribution.
- **Tip:** "Consultant" is too vague when detailing a contributor's occupation. Be specific. Instead, enter the specific type of consultant: "Marketing consultant," "media consultant," "political strategy consultant," "Mary Kay consultant."
- All in-kind contributions must include a description of the specific items or services received by the campaign.

Add a New Contribution

To add in contribution information, open the relevant Schedule A subtab (Candidate, Loans, Fundraisers, Committee, Individual), and select the purple **Add** button. Contribution information can also be **edited** and **deleted** in the subtabs.



All contribution types *except* the **Candidate** subtab will be redirected to a screen with an **Entity Search** and a **Row Details** tab (see image below).

A screenshot of a web application interface. At the top, there are two tabs: 'Entity Search' (highlighted in yellow) and 'Row Details'. Below the tabs is a search form with a dropdown menu for 'Entity Type' (set to '- Please Select -'), a text input for 'Entity or Last Name', a checkbox for 'Search All Campaigns', and text inputs for 'First Name' and 'Middle Initial'. Below the form is a row of buttons: 'Search', 'Select', 'Use Candidate', 'Cancel', 'Reset', and 'Create New Entity Hint'. At the bottom, there is a section titled 'Entity Search Results' with a 'Display 5 records' dropdown and a 'Search:' input field.

The **Entity Search** tab gives users the option to auto-populate previously saved contributor information. When adding a loan, fundraiser, committee, or individual contribution, once the purple **Add** button has been selected, the **Entity Search** option will appear. If an individual or entity has already been entered into CERS, this search option allows the information to be pulled up and does not require a manual entry.

To search for an individual or entity,

1. Select the **Entity Type** (Bank, Business, or Individual),
2. Enter in the entity or individual's name information, and
3. Select the **Search** button to see if the entity or individual already exists in the system.
 - *If* no "Entity Search Results" appear, click the **Row Details** tab to manually enter the information.
 - *If* the correct information is in the "Entity Search Results" section, check the box next to the relevant entity, and hit **Select**. You will then be redirected automatically to the **Row Details** screen.

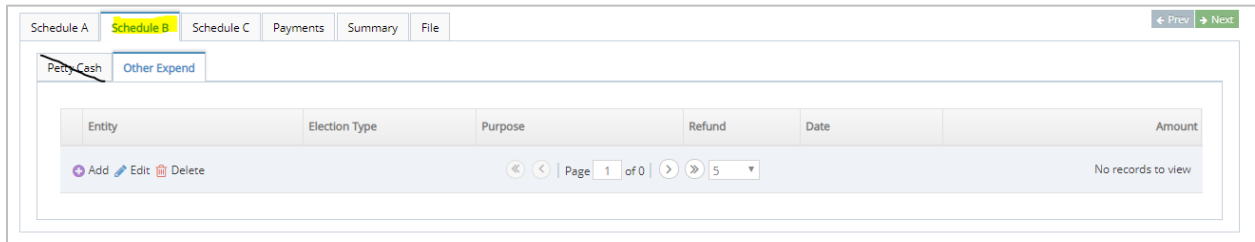
The **Row Details** tab is where users enter specific and identifying information about campaign contributions.

1. Select the "Election Type" to designate which election the contribution will support (Primary or General),
2. The date the contribution was received (the date the contribution was received by the campaign must be used, **NOT** the date the contributions was deposited into the campaign account),

3. Enter information to identify the contributor source (e.g. the contributor's name, address, occupation and employer for individual contributions, the committee name and address for committee contributions).
4. An **in-kind contribution** means the furnishing of services, property, or rights without charge or at a charge which is less than fair market value ([44.11.702, ARM](#)). Frequently, in-kind contributions come in the form of services for which charges usually are made but which are rendered to the campaign free of charge or at a discounted amount. If something is sold to the campaign at less than fair market value, the difference must be recorded as an in-kind contribution. A detailed description is required for all in-kind contributions.
5. The **Purpose/Description** section must describe the in-kind contribution the candidate has reported receiving and must be detailed enough to distinguish between items or services that may be similar in nature.

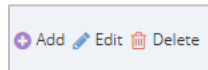
Once all contribution details have been entered into the **Row Details** section, select the **Submit** button, and then select the blue **Save** button. The **Save** button must be selected after every entry, or the CERS system may override that entry or duplicate the entity for each subsequent entry you make.

Part 4: Add Expenditures (Schedule B) in CERS

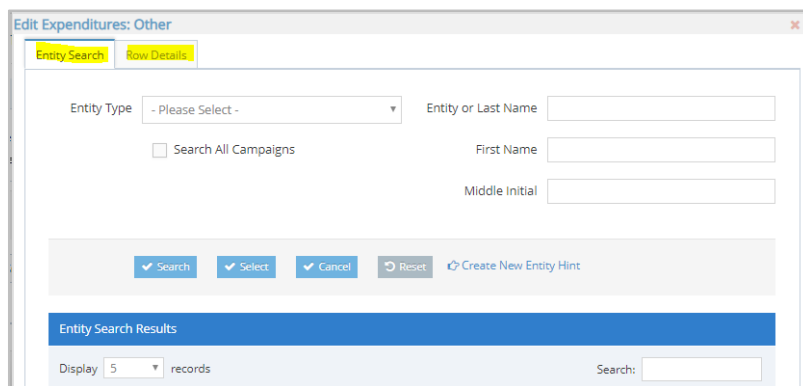


All campaign expenditures must be entered in **Schedule B**, specifically the **Other Expend** subtab.

To add in a candidate expenditure, select the **Other Expend** subtab, and click the purple **Add** button. Expenditure information can also be **edited** and **deleted** in this subtab.



In the next screen, there will be an **Entity Search** and a **Row Details** tab (see image below).



The **Entity Search** tab gives users the option to auto-populate previously entered expenditure information. If an individual or entity has already been entered into CERS, this search option allows the information to be pulled up and does not require a manual entry.

To search for an individual or entity to identify them as the source of an expenditure,

1. Select the **Entity Type** (Bank, Business, or Individual),
2. Enter in the entity or individual's name, and
3. Select the **Search** button to see if the entity or individual already exists in the system.
 - If the correct information is in the "Entity Search Results" section, check the box next to the relevant entity, and hit **Select**. You will then be redirected automatically to the **Row Details** screen.
 - If no "Entity Search Results" appear, click **Create New Entity** to manually enter the information. Once the information is entered, click **Submit**. The next screen redirects to the **Row Details** screen.

The **Row Details** tab is where users enter specific and identifying information about campaign expenditures.

1. Select "Election Type" to designate which election the expenditure will support (General or Primary).
2. "Date" represents the date the expenditure was paid to the individual, business, or other entity.
3. Under "Purpose," candidates are required to disclose expenditure details to provide enough detail so expenditures are both distinguishable from other expenses and are easily attributed back to their source.
 - Paid communications must identify: 1) the material's platform/medium (e.g. newspaper ad, Facebook boosted post, Google banner ad, billboard, etc.), 2) quantity of the materials or the dates the paid material ran, and 3) the material's subject matter. See [this link](#) for guidance on reporting paid communications.
 - **PLEASE NOTE** that the CERS software limits a **Purpose** description to a 150-character limit. If more detail is needed, include an addendum. To add an addendum, first, note in the **Purpose** description "See addendum." Then, email a copy of the addendum to cppcompliance@mt.gov and explain that the addendum goes with the report dated xx/xx/xxxx-xx/xx/xxxx. While the COPP will make sure the addendum is saved with the report and easily available for the public to find, addendums cannot be uploaded or entered directly into CERS by the COPP.

Once an expenditure's details have been entered into the **Row Details** section, select the **Submit** button, and then select the blue **Save** button. The **Save** button must be selected after every entry, or the CERS system may override that entry or duplicate the entry for each subsequent entry you make.

Often-Missed Expenditures

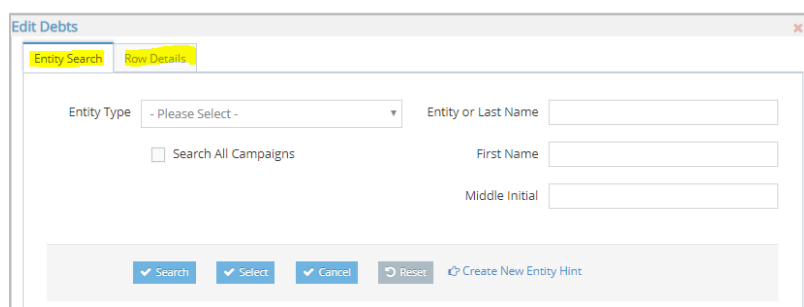
1. The candidate's filing fee is a mandatory reportable expenditure. The filing fee can be paid either out of the candidate's campaign account (if funds are available), or out-of-pocket by the candidate using personal funds. If personal funds are used, the filing fee needs to be reported as either an in-kind candidate contribution (if the candidate does not want to be reimbursed for that expense) or as an in-kind candidate loan (if the candidate wants to be reimbursed).
2. Vendor fees for any contribution-processing vendor (e.g. PayPal, ActBlue, Revv, etc.) must be reported as an expenditure.
3. Gas and mileage must be reported as an expenditure.
 - The COPP recommends that candidates who use their personal vehicle for campaign-related travel report the use of the vehicle and fuel costs as an expenditure based on [the federal reimbursement rate](#).
 - If the candidate's campaign uses a rental car for campaign-related expenses, the cost of the rental car and the cost of fuel must be reported as expenditures.
4. Expenses related to paid communications (e.g. Facebook, billboard, newspaper, or radio ads) must report the 1) platform, 2) quantities (the number of materials/ads and/or the dates the ad(s) ran), and the 3) subject matter of the ads. In-depth details are available on the COPP's [Expenditures: Paid Communications](#) webpage.

Part 5: Add Debts (Schedule C- Debts) in CERS

All debts or other monetary obligations owed by a campaign must be reported in Schedule C.

The full name and complete mailing address of the individual or business to whom the debt is owed, a detailed description of the debt or loan, the date incurred, and whether the obligation is for the primary or the general election must be reported. If the exact amount of a debt or obligation is not known, the estimated amount must be reported ([44.10.525\(2\), ARM](#)).

To add a new debt or unpaid loan, click the purple **Add** button under the grey **Entity** bar. Just like when a contribution or expenditure is added, the next screen will have two tabs: **Entity Search** and **Row Details**.



The screenshot shows a web form titled "Edit Debts" with two tabs: "Entity Search" (active) and "Row Details". The "Entity Search" tab contains the following fields and controls:

- Entity Type:** A dropdown menu currently set to "- Please Select -".
- Entity or Last Name:** A text input field.
- Search All Campaigns:** A checkbox that is currently unchecked.
- First Name:** A text input field.
- Middle Initial:** A text input field.
- Buttons:** A row of five buttons: "Search" (with a checkmark icon), "Select" (with a checkmark icon), "Cancel" (with a checkmark icon), "Reset" (with a circular arrow icon), and "Create New Entity Hint" (with a plus icon).

The **Entity Search** tab gives users the option to auto-populate a previously entered entity or individual's information. If the entity has already been entered into CERS, this search option allows the information to be pulled up and does not require a manual entry.

To search for an individual or entity to identify them as the source of a loan or debt,

1. Select the **Entity Type** (Bank, Business, or Individual),
2. Enter in the entity or individual's name, and
3. Select the **Search** button to see if the entity or individual already exists in the system.
 - If the correct information is in the "Entity Search Results" section, check the box next to the relevant entity, and hit **Select**. You will then be redirected automatically to the **Row Details** screen.
 - If no "Entity Search Results" appear, click **Create New Entity** to manually enter the information. Once the information is entered, click **Submit**. The next screen redirects to the **Row Details** screen.

The **Row Details** tab is where users enter specific and identifying information about campaign debts and loans.

1. Select the "Election Type" to designate which election the expenditure will support (Primary or General).
2. The "Date" reported must be the date the debt or obligation owed to an individual, business, or other entity was incurred.
 - Under "Purpose," candidates are required to describe debts owed with the same level of detail as is required of expenditures.

- PLEASE NOTE that the CERS software limits a "Purpose" description to a 150-character limit. If more detail is needed, include an addendum. To add an addendum, first, note in the "purpose" description "See addendum." Then, email a copy of the addendum to cppcompliance@mt.gov and explain that the addendum goes with the report dated xx/xx/xxxx-xx/xx/xxxx. While the COPP will make sure the addendum is saved with the report and easily available for the public to find, addendums cannot be uploaded or entered directly into CERS by the COPP.

Once a new debt has been entered into the **Row Details** section, select the **Submit** button, and then select the blue **Save** button. The **Save** button must be selected after every entry, or the CERS system may override that entry or duplicate the entity for each subsequent entry you make.

Part 6: Add Payments (on Debts and Loans) in CERS

All outstanding loans reported in **Schedule A** and debts or obligations reported in **Schedule C** will appear in the **Payments** tab. To enter payments on a loan or debt, select the check box next to the relevant loan or debt in the **Payments** tab. Then, under "Payment History," click the purple + **Add** button to record a new payment.

Enter in the date of the loan or debt payment, the amount paid, click **Submit**, and then **Save**. The **Save** button must be selected after every entry, or the CERS system may override that entry or duplicate the entity for each subsequent entry you make.

Part 7: Understand the Summary Tab

The **Summary** tab keeps a running total of money received and spent by the campaign during the current reporting period. The **Summary** tab details the campaign's bank balance at the start of the reporting period, all monetary contributions received by the campaign, the total amount of all campaign expenditures, and the ending bank balance for both the account (this is done for both the primary and general accounts).

- **Cash in Bank** is the ending balance of the previous report (this will be \$0 for the initial report). Please note that the beginning balance (cash in bank) includes all funds the candidate reported as having received on previous finance reports; this includes both contributions and loans.
- **Receipts** represent all contributions received during the current reporting period. These are added to the **Cash in Bank** balance and reflected in the **Subtotal** amount.
- **Expenditures** represent all campaign expenditures made by the candidate during the current reporting period, and are subtracted from the **Subtotal**.
- The difference between the **Subtotal** and current reporting period **Expenditures** is shown in the **Cash in Bank – Ending Balance**. This balance should correspond with the candidate's accounts as of the closing date of the reporting period; that is, the fifth day before the report is due.

Part 8: File a Campaign Finance Report

Select the **File** tab to file a campaign finance report. To file, check the box to certify that all information is correct, and then click the “Certify and File” button.

If a campaign finance report needs to be amended later, this is possible by going back to the candidate dashboard, selecting the specific report, and selecting the “Update or Amend Report” button. A candidate has multiple options for closing out a report. Reference this [FAQ for Closing out a Candidate Campaign Account](#).

Filing options:

- **Display contributors’ names and addresses that contributed < \$35?** Candidates may select this option if they prefer that their finance report shows every individual contribution of less than \$35 received. If the option is not selected, CERS automatically aggregates those contributions and includes them as one mass contribution on the public view version of the report.
- The **Is this a closing report?** option should only be selected once all campaign debts have been paid off and the candidate does not intend to file any future C5 finance reports. See [this link](#) for details about how to close a campaign account and the proper ways to disperse of surplus funds.

Part 9: Campaign Finance Report Review Process

The COPP reviews all campaign finance reports and sends the candidate an **Inspection Report**.

An Inspection Report is a COPP inspection that occurs each time a candidate files a campaign finance report leading up to an election. The Inspection Report notes all changes a candidate must make to each campaign finance report in order to comply with Montana law. A CFR Inspection Report will only detail one specific financial report, which will be stated in the “Reference Report” field. [Click here](#) to see a sample Inspection Report.

An **Exam** occurs after an election and serves as a final and cumulative inspection of all financial reports filed by a candidate or committee ([13-37-123, MCA](#)). All campaign finance reports are included in the **Exam**, and the COPP alerts the candidate or committee to all outstanding items or issues that must be addressed by the candidate or committee.

The COPP is available to assist candidates and committees in correcting or addressing all items noted in the CFR Compliance report. However, it is the responsibility of the candidate or committee to ensure all reporting requirements have been met.

With every **Inspection Report** and the **Exam**, the candidate must amend the specific campaign finance report where issues are noted. A campaign finance report can be amended by navigating back to the candidate dashboard and selecting the blue **Finance Reports** button. Then, select the relevant campaign finance report and select **Update or Amend Report**. Update information as necessary. Save changes. Finally, re-file the campaign finance report (Read more about the COPP’s Inspection Report and Exam process [here](#)).

Campaign Finance Resources

It is a COPP priority that campaign finance be an accessible subject for voters, candidates, committees, lobbyists, and all Montanans. For more details on campaign finance requirements for candidates and treasurers, each candidate and treasurer should familiarize themselves with this [Accounting and reporting Manual for Candidates and Treasurers](#).

This list has links to all the webpages this guide referenced:

- [Campaign Finance Laws](#)
- [Guide to Registering as a Candidate](#)
- [Filing as an Exploratory Candidate](#)
- [How to Report a Self-Loan to Your Candidate Campaign Account](#)
- [How to Report a Paid Communications, Attribution \(Paid for By\) Information](#)
- [Candidate Campaign Finance Forms](#)
- [Candidate Reporting Calendar](#)
- [Contribution Limits](#)
- [The COPP's Inspection and Exam Process](#)
- [How to Close out a Candidate Campaign Finance Account](#)

Candidates and treasurers should contact the COPP office when assistance is needed. We are available to support all candidates and treasurers!

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