

How to Report a Self-Loan to Your Candidate Campaign Account

A personal loan to your campaign or the purchase of any items or use of personal campaign related items are reported under **Section A** in the subtab of **Loan**.

- 1) To add in a candidate loan, click the purple **Add** option.

The screenshot shows the 'Candidate Campaign Finance Report' interface. At the top, it displays 'Candidate Information' with fields for 'Candidate Full Name' and 'Mailing Address'. Below this, the 'Reporting Period' is set from 05/21/2019 to 06/26/2019. The main navigation tabs include 'Schedule A', 'Schedule B', 'Schedule C', 'Payments', 'Summary', and 'File'. Under 'Schedule A', there are sub-tabs for 'Candidate', 'Loans', 'Fundraisers', 'Committee', and 'Individual'. The 'Loans' sub-tab is active, showing a table with columns: Entity, Election Type, Occupation, Employer, Date, and In-Kind Descr. A yellow box highlights the 'Add' button in the table's toolbar. Below the table is a 'Payment History' section with a similar toolbar and a table with columns: Reporting Period From, Reporting Period To, Date Paid, and Paid Amount. The 'Add' button in this section is also highlighted.

- 2) For every loan a candidate makes to themselves, they will select the blue **Use Candidate** button automatically input their information.

The screenshot shows the 'Edit Loans' interface. It has two tabs: 'Entity Search' and 'Row Details'. The 'Entity Search' tab is active. It contains a search form with fields for 'Entity Type' (a dropdown menu), 'Entity or Last Name', 'First Name', and 'Middle Initial'. There is a checkbox for 'Search All Campaigns'. Below the search fields is a toolbar with buttons: 'Search', 'Select', 'Use Candidate' (highlighted in yellow), 'Cancel', 'Reset', and 'Create New Entity Hint'. Below the toolbar is the 'Entity Search Results' section, which includes a 'Display' dropdown set to '5 records', a 'Search' input field, and a table with columns: Name, Type, and Address. The table is currently empty, showing 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

- 3) On the next screen, report the following details: 1) Election type, 2) Your occupation, 3) Your employer, and 4) the date the transaction was completed.
- *If you are entering a monetary loan that you are making to your campaign, add in details about the cash/check amount.*
 - *If you purchased campaign items using your personal funds and seek reimbursement from your campaign account, you will report this as an **In-Kind Contribution** because you are contributing the items and not money to your account. Add in details about: 1) the date the in-kind contribution was given to your campaign, 2) an in-kind description value (Including: a. where the payment was made, b. what was purchased, and c. quantity of purchased items), and 3) the in-kind amount or value of the item.*
 - **Note:** If you are entering a loan for a paid campaign communication, you must report the 1) platform, 2) quantities, and 3) subject matter of the ad. See this [Paid Communication Guide](#) for more details.

Then, click **Submit**.

The screenshot shows the 'Edit Loans' interface. At the top, there are tabs for 'Entity Search' and 'Row Details'. Below this is a 'Report Period' section with 'From Date: 05/21/2019' and 'To Date: 06/26/2019'. The main section is 'Report Detail Entry', which contains the following fields:

- Entity:** CandidateLastName, CandidateFirstName
123 Montana Way, Helena, MT 59601
- Election Type:** General (dropdown menu)
- Occupation:** Teacher
- Employer:** Helena Public School District
- Date:** 05/22/2019 (calendar icon)
- In-Kind Description:** Purchase of candy and signs for parade (Smith's Hardware)
- In-Kind Amount:** \$ 50.00
- Cash/Check Amount:** \$ 0.00
- Total to Date Primary:** \$ 0.00
- Total to Date General:** \$ 150.00

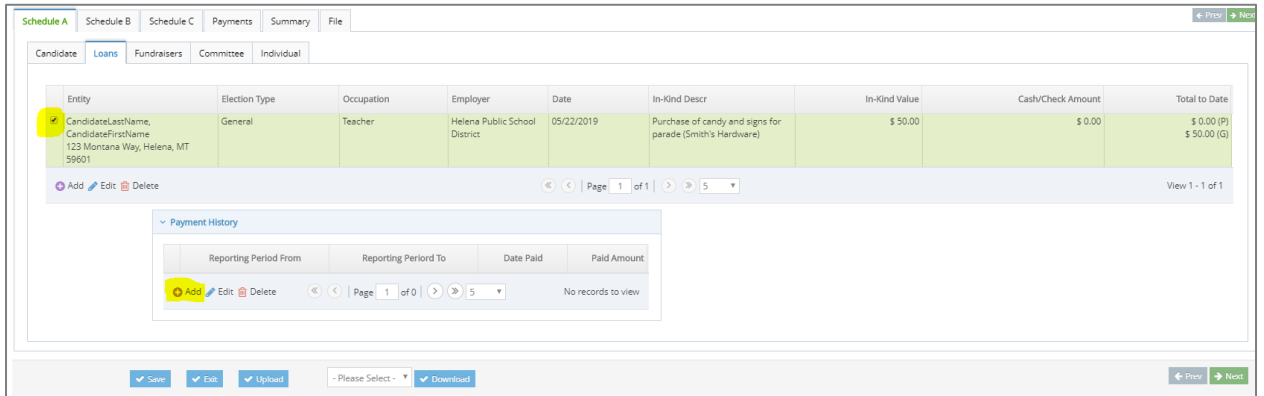
At the bottom of the form, there are three buttons: 'Change Entity', 'Submit' (highlighted in yellow), and 'Cancel'.

Figure: Example of an in-kind candidate loan

- 4) When you are redirected to the Campaign Finance Report page, you will see the newly entered loan. **Make sure to click Save.** You will be unable to make a payment on the loan until the loan is saved in the CERS system.

- To make a payment on a candidate loan, again go to **Schedule A** and to the **Loans** subtab. All loans already entered for the report period will be listed. First, **Check** the box next to the loan you are entering a payment for, and then click the purple **Add** button under the **Payment History** section.

You also have the option to **Edit** previous loan payment information from this screen. If you have a loan that needs be edited from *another* report, you will need to go back to that specific report.



- On the next screen, enter in the loan payment information of 1) Date and 2) Paid amount. You are able to enter partial payments. Then, click submit.
- As always, make sure to **Save** all activity.