

# CAMPAIGN FINANCE REPORTING

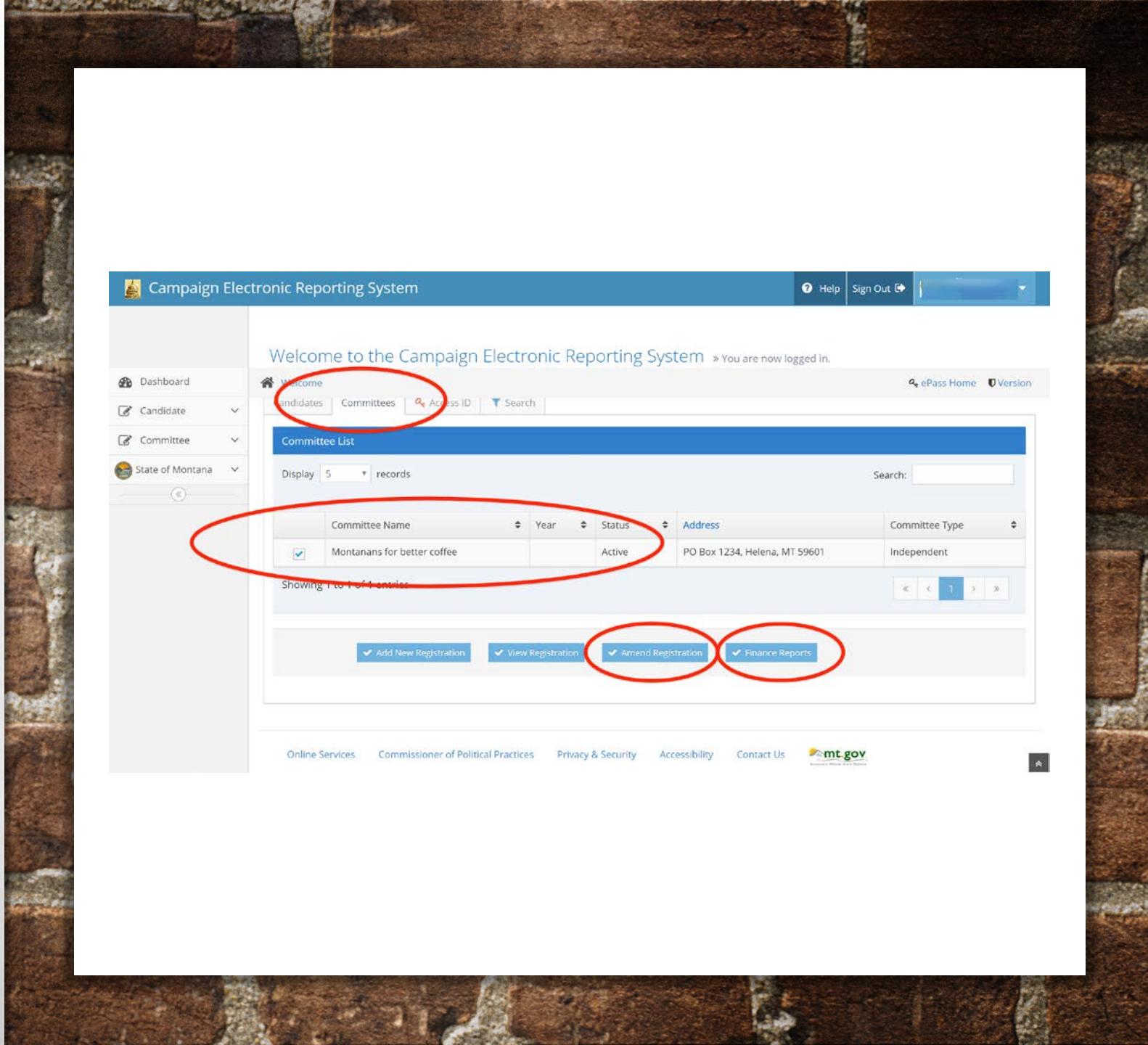
MONTANA COMMISSIONER OF POLITICAL PRACTICES

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



# UPDATE A C2 WITHIN 5 DAYS OF CHANGE

TREASURER REVISION, ADDRESS,  
EMAIL, CONTACT CHANGE,  
PURPOSE OF COMMITTEE



The screenshot shows the Campaign Electronic Reporting System (CERS) interface. The top navigation bar includes a logo, the title "Campaign Electronic Reporting System", a "Help" link, a "Sign Out" button, and a dropdown menu. The left sidebar has links for "Dashboard", "Candidate", "Committee", and "State of Montana". The main content area is titled "Welcome to the Campaign Electronic Reporting System" and "You are now logged in." It shows a "Committee List" table with one record. The table has columns for "Committee Name", "Year", "Status", "Address", and "Committee Type". The record is "Montanans for better coffee" (Active, PO Box 1234, Helena, MT 59601, Independent). The footer contains buttons for "Add New Registration", "View Registration", "Amend Registration" (which is circled in red), and "Finance Reports". The bottom of the page includes links for "Online Services", "Commissioner of Political Practices", "Privacy & Security", "Accessibility", "Contact Us", and the "mt.gov" logo.

Committee Name	Year	Status	Address	Committee Type
Montanans for better coffee		Active	PO Box 1234, Helena, MT 59601	Independent

# IMPORTANT ELEMENTS! EMAIL PHONE SUPPORT & OPPOSITION INFO

Campaign Electronic Reporting System

Amend Committee Registration and Reporting » update existing filing

**Committee Information**

\*Committee Name: Montanans for better coffee

Mailing Address: PO Box 1234

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

Physical Address: PO Box 1234

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

\*Committee Type: Independent \*Incorporated: No

**Committee Treasurer Information**

\*Last Name: Bean \*First Name: C. MI: MI

\*Mailing Address: PO Box 1234

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

Physical Address: PO Box 1234

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

Phone: (406) 555-5555 Alternate Phone: (406) 555-5555

\*Email address: bean@mt.gov

**Deputy Treasurer Information**

Name: Tea Leaf Mailing Address: PO Box 1234 Helena, MT Physical Address: PO Box 1234 Phone: (406) 555-5555 Alternate Phone: (406) 555-5555 Email Address: jeff.mangan@mt.gov

**Add | Edit | Delete**

**Committee Account Information**

\*Primary Bank Name: First Bank of Coffee Beans

\*Bank Address: PO Box 6969

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

Secondary Bank Name: Secondary Bank Name

Bank Address: Bank Address

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

**Additional Officer Information**

Name: Mailing Address: Physical Address: Phone: Alternate Phone: Email Address:

**Purpose of Committee under Name(s) of Candidate(s) or Ballot Issue(s)**

Ballot Code: Position: Issue Status:

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 contributions/expenditures will not exceed \$500.00. (If \$500.00 is exceeded, filing of campaign finance reports will be required)

Online Services | Commissioner of Political Practices | Privacy & Security | Accessibility | Contact Us | [mt.gov](#)

STATE OF MONTANA POLITICAL CAMPAIGN CONTRIBUTION  
LIMITS SUMMARY – applicable to 2018 campaigns

December 8, 2017

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 \$680 per election  
To a candidate for Other Statewide Office\* \$340 per election  
To a candidate for Other Public Office\*\* \$180 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 ACTION COMMITTEE (PAC)**

To candidates for Governor/Lt. Governor \$680 per election  
To a candidate for Other Statewide Office\* \$340 per election  
To a candidate for Other Public Office\*\* \$180 per election

**Aggregate PAC Limits for Legislative Candidates for the 2018 elections**

To a candidate for State Senate \$2,850  
To a candidate for State House \$1,750

**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 independent expenditure relating to such an election. See Sanders County Republican Party v. Bullock, 698 F.3d 741 (9th Cir., 2012). See also personnel services exception ARM 44.11.225 (3).*

To candidates for Governor/Lt. Governor \$24,500 per election  
To a candidate for Other Statewide Office\* \$8,850 per election  
To a candidate for Public Service Comm. \$3,550 per election  
To a candidate for State Senate \$1,450 per election  
To a candidate for Other Public Office\*\* \$900 per election  
*Excluding PSC and State Senate*

**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 FINANCE LIMITS

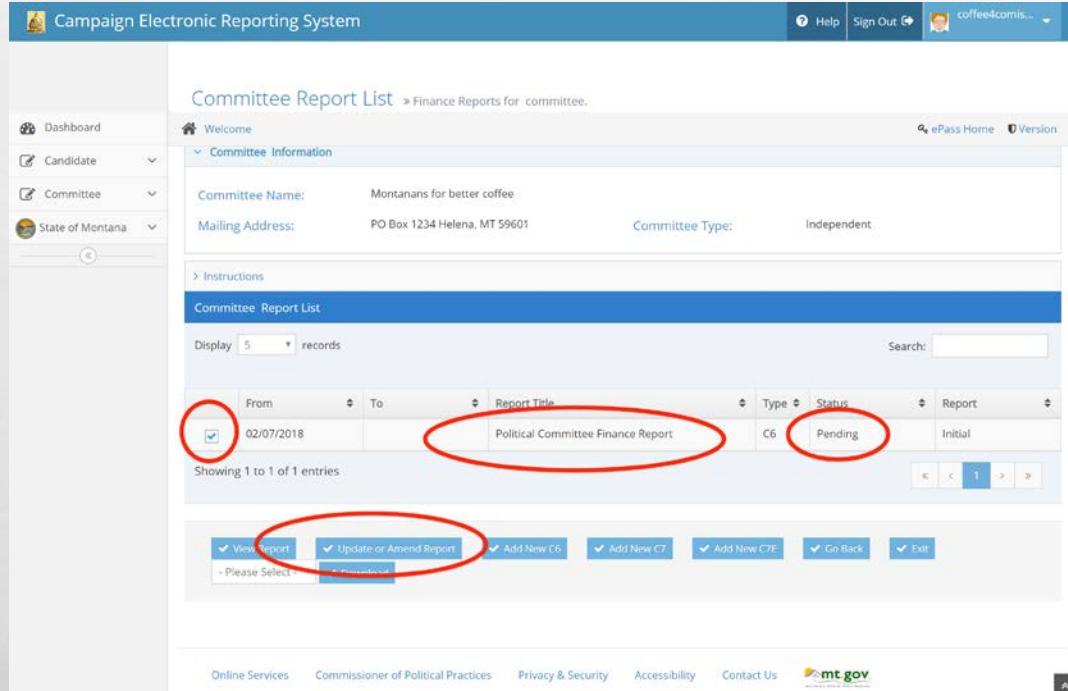
- BE AWARE THAT CAMPAIGN FINANCE LIMITS APPLY TO EACH ELECTION (CANDIDATES)
- AGGREGATE LIMITS APPLY TO CANDIDATES
- COMMITTEES DO NOT HAVE FINANCE LIMITS
- SEGREGATE CORPORATION CONTRIBUTIONS

# REPORTING – CONTRIBUTIONS SCHEDULE A

FROM LOANS, FUNDRAISERS, COMMITTEES, INDIVIDUAL –

REPORT ALL SEPERATELY, USING THE TABS ON SCHEDULE A

# SELECT CURRENT CFR AND UPDATE THROUGHOUT THE REPORTING PERIOD



The screenshot shows the 'Committee Report List' page of the Campaign Electronic Reporting System. The page displays a table with one entry. The table columns are: From, To, Report Title, Type, Status, and Report. The 'From' field is set to 02/07/2018. The 'Report Title' field is set to Political Committee Finance Report. The 'Status' field is set to Pending. The 'Type' field is set to C6. The 'Report' field is set to Initial. The table has a blue header bar. Below the table, a message says 'Showing 1 to 1 of 1 entries'. At the bottom of the page, there is a footer with several buttons: 'View Report', 'Update or Amend Report' (which is highlighted with a red circle), 'Add New C6', 'Add New C7', 'Add New C7E', 'Go Back', and 'Exit'. The 'Update or Amend Report' button is the primary focus, as indicated by the red circle.

- NAVIGATE TO CURRENT CAMPAIGN FINANCE REPORT
- SELECT UPDATE OR AMEND REPORT
- TIP – UPDATE REGULARLY AS YOU INCUR CONTRIBUTIONS AND EXPENDITURES, THE SAVE FUNCTION ALLOWS YOU TO UPDATE THE CURRENT CFR UNTIL YOU ARE READY TO FILE AFTER THE END OF THE REPORTING PERIOD
- DO NOT FILE UNTIL AFTER REPORTING PERIOD ENDS

# NAVIGATE SCHEDULE A LOANS FUNDRAISERS COMMITTEE INDIVIDUAL

The screenshot shows the Campaign Electronic Reporting System (CERS) interface for a Committee Campaign Finance Report (C-6). The top navigation bar includes links for Help, Sign Out, and a user profile for 'coffee4comis...'. The left sidebar shows navigation links for Dashboard, Candidate, Committee, and State of Montana. The main content area displays committee information: Full Name (Montanans for better coffee), Mailing Address (PO Box 1234 Helena, MT 59601), and Committee Type (Independent). The reporting period is set from 02/07/2018 to a blank 'To' date, with a status of 'Pending'. A red box highlights the 'Schedule A' tab, and another red box highlights the 'Loans' sub-tab under the Schedule A section. The 'Payment History' section shows no records. At the bottom, there are buttons for Save, Exit, Upload, Download, and a dropdown menu.

Campaign Electronic Reporting System

Committee Campaign Finance Report (C-6)

Committee Information

Committee Full Name: Montanans for better coffee

Mailing Address: PO Box 1234 Helena, MT 59601

Committee Type: Independent

Reporting Period: \*From 02/07/2018  \*To  Status: Pending

Schedule A

Loans Fundraisers Committee Individual

Entity Election Type Occupation Employer Date In-Kind Descr In-Kind Value Cash/Check Amount Total to Date

Add   Page 1 of 0 >> 5

No records to view

Payment History

Reporting Period From Reporting Period To Date Paid Paid Amount

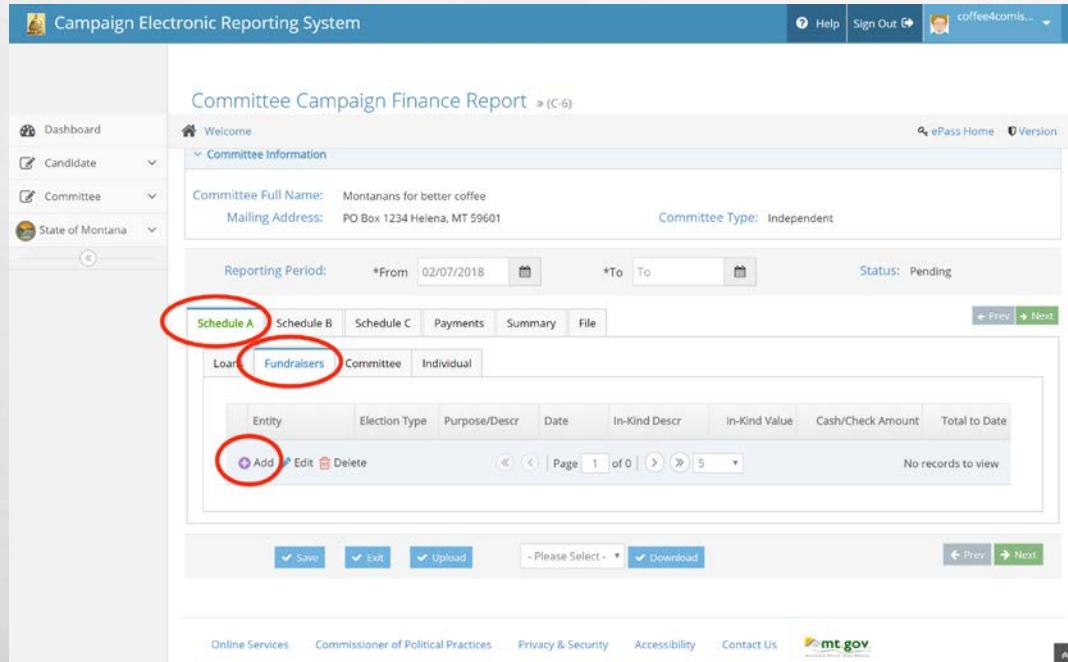
Add   Page 1 of 0 >> 5

No records to view

Save  Upload  Please Select

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# ADD A FUNDRAISER IN SCHEDULE A REPORT ALL OVER \$35 CONTRIBUTIONS UNDER THE INDIVIDUAL TAB, INCLUDING >\$35 TICKETS



The screenshot shows the 'Committee Campaign Finance Report (C-6)' page in the Campaign Electronic Reporting System. The 'Fundraisers' tab is highlighted and circled in red. The 'Schedule A' tab is also circled in red. The 'Individual' tab is visible but not selected. The page displays reporting period, committee information, and a table for adding contributions.

- REPORT ALL <\$35 PASS THE HAT, RAFFLE SALES, ETC. AS A MASS CONTRIBUTION
  - REMEMBER TO KEEP TRACK OF THOSE DONORS
  - ANONYMOUS CONTRIBUTIONS PROHIBITED
- REPORT ALL >\$35 DONATIONS, INDIVIDUAL TICKET SALES, ETC. AS AN INDIVIDUAL CONTRIBUTION (NAME, ADDRESS, OCCUPATION, EMPLOYER) UNDER THE INDIVIDUAL TAB IN SCHED A

Campaign Electronic Reporting System

Committee Campaign Finance Report » (C-6)

Committee Information

Committee Full Name: Montanans for better coffee  
Mailing Address: PO Box 1234 Helena, MT 59601  
Committee Type: Independent

Reporting Period: \*From: 02/07/2018 \*To: To Status: Pending

Schedule A Schedule B Schedule C Payments Summary File

Loans Fundraisers Committee Individual

In-Kind Donation

Entity	Election Type	Purpose/Descr	Date	In-Kind Descr	In-Kind Value	Cash/Check Amount	Total to Date
Coffee Distribution Zones Fundraiser	General		04/12/2018	Donation of Espresso Machine for Coffee Zone raffle	\$ 350.00	\$ 0.00	\$ 0.00 (P) \$ 0.00 (G)

Under \$35 mass

Entity	Election Type	Purpose/Descr	Date	In-Kind Descr	In-Kind Value	Cash/Check Amount	Total to Date
Coffee Distribution Zones Fundraiser	General	Raffle of Espresso Machine, 100 tickets at \$10 per ticket	04/12/2018		\$ 1,000.00	\$ 0.00 (P) \$ 0.00 (G)	

Add Edit Delete Page 1 of 0 View 1 - 2 of 2

Save Exit Upload Please Select Download

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## SUCCESSFULLY ADDED FUNDRAISER IN SCHEDULE A

- ALWAYS INCLUDE NUMBER OF ATTENDEES
- ONLY REPORT <\$35.00 DOLLAR AS A MASS CONTRIBUTION
- CONTRIBUTIONS \$35 OR GREATER FROM A FUNDRAISER FILE UNDER INDIVIDUAL TAB
- TIP – KEEP TRACK OF ALL UNDER \$35 CONTRIBUTIONS – USE ENVELOPE TO RECORD NAME, DATE, CONTACT INFO, ETC

Campaign Electronic Reporting System

Success! The Political Committee Finance Report was successfully saved for Montanans for better coffee

Dashboard Candidate Committee State of Montana

Welcome Committee Campaign Finance Report (C-6)

Committee Information

Committee Full Name: Montanans for better coffee  
Mailing Address: PO Box 1234 Helena, MT 59601 Committee Type: Independent

Reporting Period: \*From: 02/07/2018 \*To: To: Status: Pending

Schedule A Schedule B Schedule C Payments Summary File

Loans Fundraisers Committee Individual

Entity	Committee Type	Election Type	Date	In-Kind Descr	In-Kind Value	Cash/Check Amount	Total to Date
Coffee, Inc 111 State Helena, MT 59000	Incidental	General	04/11/2018		\$ 500.00	\$ 0.00 (P) \$ 0.00 (C)	

Add Edit Delete Page: 1 of 0 View 1 - 1 of 1

Save Exit Upload Please Select Download

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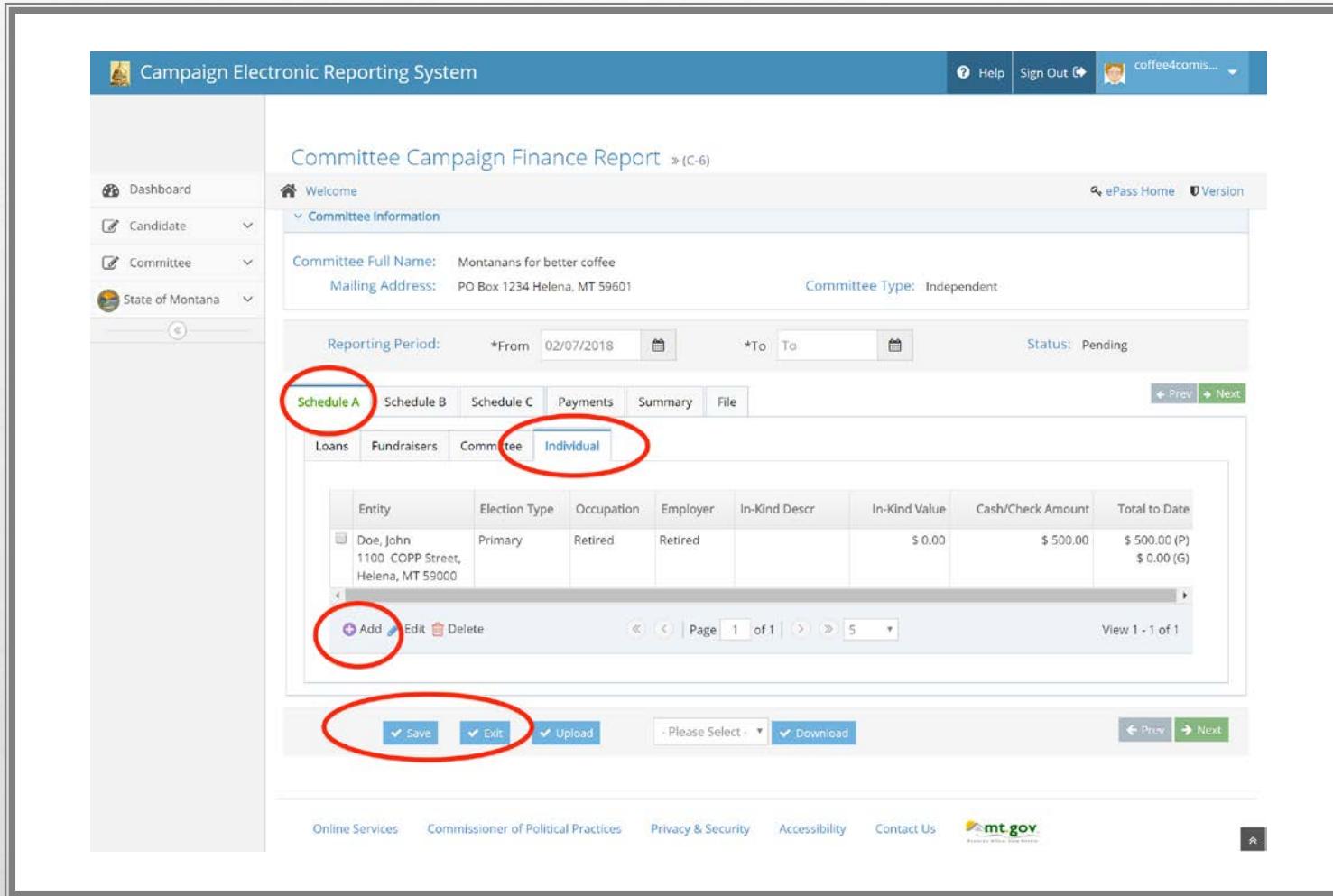
## ADD A COMMITTEE CONTRIBUTION IN SCHEDULE A

- POLITICAL PARTY COMMITTEE
- INDEPENDENT COMMITTEE
- INCIDENTAL COMMITTEE

# ACCEPTING A CORPORATION CONTRIBUTION?

THEY MUST FILE AS AN INCIDENTAL  
COMMITTEE – PROVIDE GUIDANCE

# ADD INDIVIDUAL CONTRIBUTION



The screenshot shows the 'Committee Campaign Finance Report' page. The 'Individual' tab is highlighted with a red circle. The 'Save' button at the bottom is also highlighted with a red circle. The data table shows a single contribution record for 'Doe, John'.

Entity	Election Type	Occupation	Employer	In-Kind Descr	In-Kind Value	Cash/Check Amount	Total to Date
Doe, John 1100 COPP Street, Helena, MT 59000	Primary	Retired	Retired		\$ 0.00	\$ 500.00 (P) \$ 0.00 (G)	

- REMEMBER – ALL CONTRIBUTIONS OVER \$35 ARE REQUIRED TO BE REPORTED WITH ALL REQUIRED INFO UNDER THE INDIVIDUAL TAB
- IN-KIND CONTRIBUTIONS ALSO COUNT TOWARDS CONTRIBUTION LIMITS
- ASSIGN FAIR MARKET VALUE TO IN-KIND CONTRIBUTION

# FORM C-7 – CONTRIBUTIONS JUST PRIOR ELECTION

Statewide committees – file form c-7 (w/in 48 hours) for each contribution received within 20 days of an election of contributions of \$200 or more

State District/Issue – file form c-7 (w/in 48 hours) for each contribution received within 17 days of an election of contributions of \$100 or more

# FORM C-7E – EXPENDITURE JUST PRIOR ELECTION

Statewide committees – file form c-7E (w/in 48 hours) for each expenditure within 20 days of an election of expenditure of \$500 or more

State District/Issue – file form c-7E (w/in 48 hours) for each expenditure within 17 days of an election of expenditure of \$500 or more

# REVIEW

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

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FACEBOOK - /MONTANACOPP

TWITTER - @MONTANACOPP



# REPORTING – EXPENDITURES SCHEDULE B

PETTY CASH, OTHER EXPENDITURES, INDEPENDENT EXPENDITURES –

AVOID PETTY CASH, REPORT ALL EXPENDITURES ON SCHEDULE B

The screenshot shows the CERS dashboard with a sidebar on the left containing links for Dashboard, Candidate, Committee, and State of Montana. The main content area displays a 'Welcome' message and a 'Committee List' table. The 'Committees' tab is selected. A red circle highlights the 'Committees' tab. Another red circle highlights the 'Finance Reports' button in the bottom right corner of the list table.

The screenshot shows the 'Committee Campaign Finance Report' page for a committee named 'Montanans for better coffee'. The 'Schedule B' tab is selected, highlighted with a red box. Below the tabs, there is a table with columns for Election Type, Purpose, Date, and Amount. The table shows 'No records to view'. A red box highlights the 'Schedule B' tab.

# ADDING AN EXPENDITURE IN SCHEDULE B



## ADDING AN EXPENDITURE – BE COMPLETE AND USE DETAIL

- IN THE PURPOSE FIELD DESCRIBE EXPENDITURE
- INCLUDE QUANTITY
- INCLUDE SUBJECT MATTER
- DETAIL IN ORDER TO DISTINGUISH BETWEEN LIKE EXPENDITURES
- EXAMPLE – 1000 DOUBLE SIDED MAILERS SUPPORT COFFEE DISTRICTS, INCLUDE MAP, + POSTAGE

The screenshot shows the 'Committee Campaign Finance Report' page. The 'Schedule B' tab is selected, and the 'Other Expend' tab is highlighted with a red box. The table below shows one entry: Smith, John, Primary, Canvasser, Support Coffee Levy - w/o 4/2-4/6/18 see addendum, 04/12/2018, \$ 92.35. The 'Save' button at the bottom is also circled in red.

Entity	Election Type	Purpose	Electioneering Communication	Refund	Corp Funds	Date	Amount
Smith, John 100 A Street, Helena, MT 59000	Primary	Canvasser, Support Coffee Levy - w/o 4/2-4/6/18 see addendum				04/12/2018	\$ 92.35

## ADDED 'OTHER EXPENDITURE' IN SCHEDULE B

- ALL EXPENDITURES OTHER THAN INDEPENDENT EXPENDITURES ADDED HERE
- DETAILED
- REVIEW FOR COMPLETENESS

# ADDENDUMS

## Addendum for Montanans for Better coffee

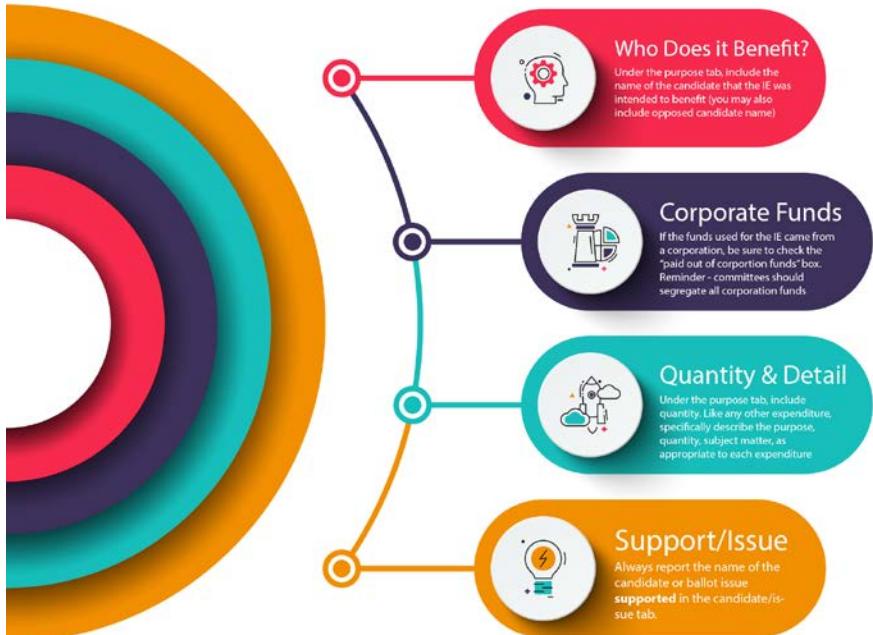
**John Smith**

Payee	Date	Candidate/Issue	Purpose	Amount	Method
John Smith	4/2/18	Coffee Levy, Flyer creation	Staff Time	\$18.47	Salary, Payroll taxes
John Smith	4/3/18	Coffee Levy, Door knocking	Staff Time	\$18.47	Salary, Payroll taxes
John Smith	4/4/18	Coffee Levy, Voter Strategy	Staff Time	\$18.47	Salary, Payroll taxes
John Smith	4/5/18	Coffee Levy, Community outreach	meeting	\$18.47	Salary, Payroll taxes
John Smith	4/6/18	Coffee Levy, Fundraiser setup & decorating		\$18.47	Salary, Payroll taxes

## INDEPENDENT EXPENDITURE REPORTING

### 44.11.502 (8) ARM, reporting independent expenditures:

- (a) shall be reported in accordance with the procedures for reporting other expenditures;
- (b) a person making an independent expenditure shall report the name of the candidate or committee the independent expenditure was intended to benefit, and the fact the expenditure was independent; and
- (c) the candidate or political committee benefiting from the independent expenditure does not have to report the expenditure.



"Independent expenditure" means an expenditure for an election communication to support or oppose a candidate or ballot issue made at any time that is not coordinated with a candidate or ballot issue committee. 13-1-101 (25), MCA

Guidance for Committees

Montana Commissioner of Political Practices | March 2018

## ADDING AN INDEPENDENT EXPENDITURE – BE COMPLETE AND USE DETAIL

- IN THE PURPOSE FIELD DESCRIBE EXPENDITURE
- INCLUDE QUANTITY
- INCLUDE SUBJECT MATTER
- DETAIL IN ORDER TO DISTINGUISH BETWEEN LIKE EXPENDITURES
- EXAMPLE – 1000 DOUBLE SIDED MAILERS J COFFEE FOR COMMISH, EDUCATION FOCUS, + POSTAGE
- RECORD CANDIDATE/ISSUE SUPPORTED IN THE CANDIDATE/ ISSUE TAB

# ADDED AN INDEPENDENT EXPENDITURE IN SCHEDULE B

Screenshot of the Campaign Electronic Reporting System (CERS) showing the addition of an independent expenditure to Schedule B.

The screenshot shows the following details:

- Success Message:** "Success! The Political Committee Finance Report was successfully saved for Montanans for better coffee".
- Committee Information:** Committee Full Name: Montanans for better coffee, Mailing Address: PO Box 1234 Helena, MT 59601, Committee Type: Independent.
- Reporting Period:** \*From: 02/07/2018, \*To: To be determined, Status: Pending.
- Schedule Selection:** Schedule B is selected (highlighted with a red circle).
- Expenditure Details:** The expenditure is listed under the "Independent" tab (highlighted with a red circle).

Entity	Election Type	Purpose	Electioneering Communication	Refund	Corp Funds	Candidate/Issue	Date	Amount
Independent Record 2222 Washington Avenue, Helena, MT 59601	General	4 column inch ad, Support Jane Coffee - Loves Good Coffee, Run 4 days, \$80 per, 4/20-23/18; oppose G Tea				Support Jane Coffee	04/13/2018	\$ 320.00
- Action Buttons:** Add, Edit, Delete, Save (highlighted with a red circle), Exit, Upload, Download.
- Navigation:** Prev, Next, Page 1 of 0, View 1 - 1 of 1.
- Footer:** Online Services, Commissioner of Political Practices, Privacy & Security, Accessibility, Contact Us, mt.gov.

# REVIEW

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

[CPPHELP@MT.GOV](mailto:CPPHELP@MT.GOV)

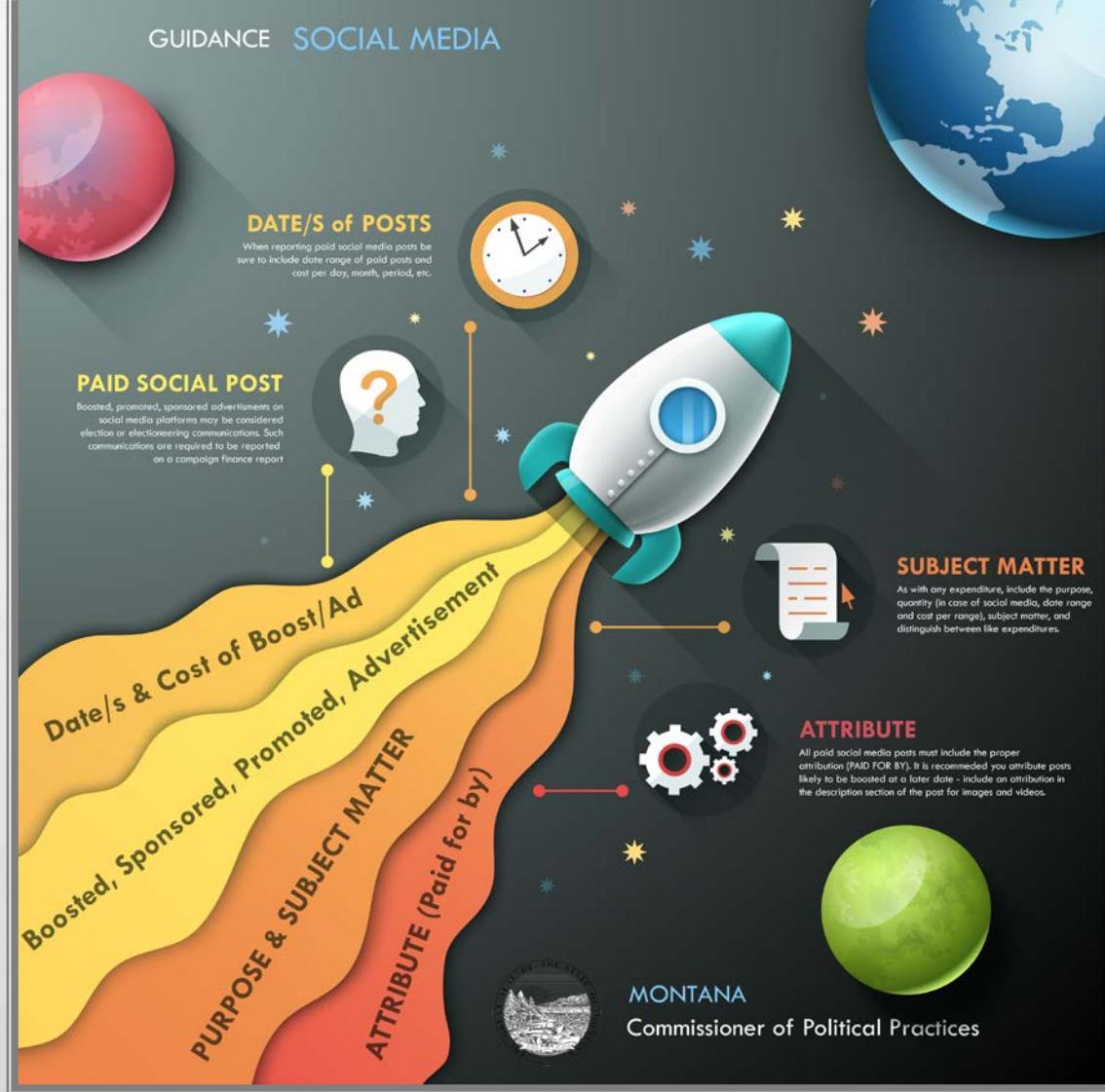
FACEBOOK - /MONTANACOPP

TWITTER - @MONTANACOPP



# SOCIAL MEDIA – EXPENDITURE REPORTING

PROPERLY REPORT PAID SOCIAL MEDIA EXPENDITURES LIKE YOUR OTHER EXPENDITURES – DETAIL PURPOSE, SUBJECT MATTER, QUANTITY, DISTINGUISH BETWEEN LIKE ITEMS



# SOCIAL MEDIA EXPENDITURE REPORTING

- AS WITH ANY OTHER EXPENDITURE, REPORT ALL PAID SOCIAL MEDIA ADVERTISEMENTS
- IN THE PURPOSE FIELD DESCRIBE EXPENDITURE
- INCLUDE QUANTITY (DATE RANGE, VIEWS, CLICKS, ETC)
- INCLUDE SUBJECT MATTER
- DETAIL IN ORDER TO DISTINGUISH BETWEEN LIKE EXPENDITURES

# ADDING A FACEBOOK PAID BOOST TO SCHEDULE B –

WHAT TYPE OF EXPENDITURE?  
OTHER EXPENDITURE  
INDEPENDENT EXPENDITURE

SAME GUIDELINES AS ANY  
OTHER EXPENDITURE

Screenshot of the Montana Campaign Electronic Reporting System (CERS) showing a Committee Campaign Finance Report (C-6) for the "Montanans for better coffee" committee. The report is for the reporting period from 02/07/2018 to To. The status is Pending. The "Schedule B" tab is selected, and the "Other Expend" sub-tab is active. The expenditure table shows two entries:

Entity	Election Type	Purpose	Electroengineering Communication	Refund	Corp Funds	Date	Amount
Facebook 1601 S California Ave, Palo Alto, CA 94304	General	Facebook Boost \$5 per day for 30 days 4/1-4/30/18, 'Vote in Levy election' image	<input checked="" type="checkbox"/>			04/01/2018	\$ 149.60
Smith, John 100 A Street, Helena, MT 59000	Primary	Canvasser , Support Coffee Levy - w/o 4/2-4/6/18 see addendum				04/12/2018	\$ 92.35

At the bottom, the "Save" and "Exit" buttons are highlighted with red circles. The footer includes links to Online Services, Commissioner of Political Practices, Privacy & Security, Accessibility, Contact Us, and the mt.gov logo.

The screenshot shows the Facebook Insights interface for a page named 'J Coffee'. The 'Promotions' tab is selected on the left sidebar. A red circle highlights the 'Recent Promotions on J Coffee' section, which displays a message: 'Ads activity is reported in the time zone of your ad account.' Below this, a message states: 'You have not created any promotions for J Coffee'. A red arrow points from the text 'You will find everything you need to report in your Ads Manager' to a red-bordered button at the bottom that says 'Looking for all promotions for your ad account? Go to Ads Manager'. The top navigation bar includes links for Page, Inbox, Notifications (1), Insights (selected), Publishing Tools, Settings, and Help.

# FACEBOOK PROMOTIONS TAB

- READY TO REPORT? USE YOUR FACEBOOK PROMOTIONS TAB AND/OR ADS MANAGER TO LOCATE DETAIL AND INFO FOR COMPLETE REPORTING

# REVIEW

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

[CPPHELP@MT.GOV](mailto:CPPHELP@MT.GOV)

FACEBOOK - /MONTANACOPP

TWITTER - @MONTANACOPP



# SOCIAL MEDIA – ATTRIBUTION

PROPERLY ATTRIBUTE (PAID FOR BY...) PAID SOCIAL MEDIA POST, EVENTS, IMAGES, VIDEOS, SHARED LINKS, ETC.

The image displays two screenshots of Facebook pages. The left screenshot shows the 'Montana Commissioner of Political Practices' page, which has a 'Boost Your Page for \$5' button highlighted with a red arrow. The right screenshot shows the 'J Coffee' page, which has an 'Added attribution to cover photo' message and a 'PAID FOR BY J COFFEE, PO BOX 01, HELENA, MT 59000' button highlighted with a red box.

BOOSTING YOUR FACEBOOK PAGE?  
TIP! ADD AN ATTRIBUTION TO YOUR COVER IMAGE



Events

Meet the (Faux) Candidate - Cup of Joe Fundraiser

Boost Event Share Edit ...

EVENT TIPS Next Tip

Create a Post

Get guests excited about your event by posting photos, videos and updates.

Create Post

English (US) Español Português (Brasil) Français (France) Deutsch

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Events

Meet the (Faux) Candidate - Cup of Joe Fundraiser

Boost Event Share Edit ...

EVENT TIPS Next Tip

Reach More People, Share Your Event

Help people find out about your event by sharing it in News Feed.

Share Event

English (US) Español Português (Brasil) Français (France) Deutsch

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# ATTRIBUTION – SOCIAL MEDIA

- BOOSTING OR PROMOTING A POST, LINK, VIDEO, EVENT, IMAGE?
- ADD AN ATTRIBUTION TO ANY PAID SOCIAL MEDIA POST

# REVIEW

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

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# REPORTING – DEBTS

## SCHEDULE C

REPORT ALL DEBTS ON SCHEDULE C

Campaign Electronic Reporting System

Success! The Political Committee Finance Report was successfully saved for Montanans for better coffee

Welcome Committee Campaign Finance Report (C-6)

Committee Information

Committee Full Name: Montanans for better coffee  
Mailing Address: PO Box 1234 Helena, MT 59601 Committee Type: Independent

Reporting Period: \*From 02/07/2018 \*To To Status: Pending

Schedule A Schedule B Schedule C Payments Summary File

Debts

Entity	Election Type	Purpose	Date	Type	Debt Amount	Balance Due
No records to view						

Add Edit Delete

Page 1 of 0

Payment History

Reporting Period From	Reporting Period To	Date Paid	Paid Amount
No records to view			

Add Edit Delete

Page 1 of 0

Save Exit Upload Download

Please Select

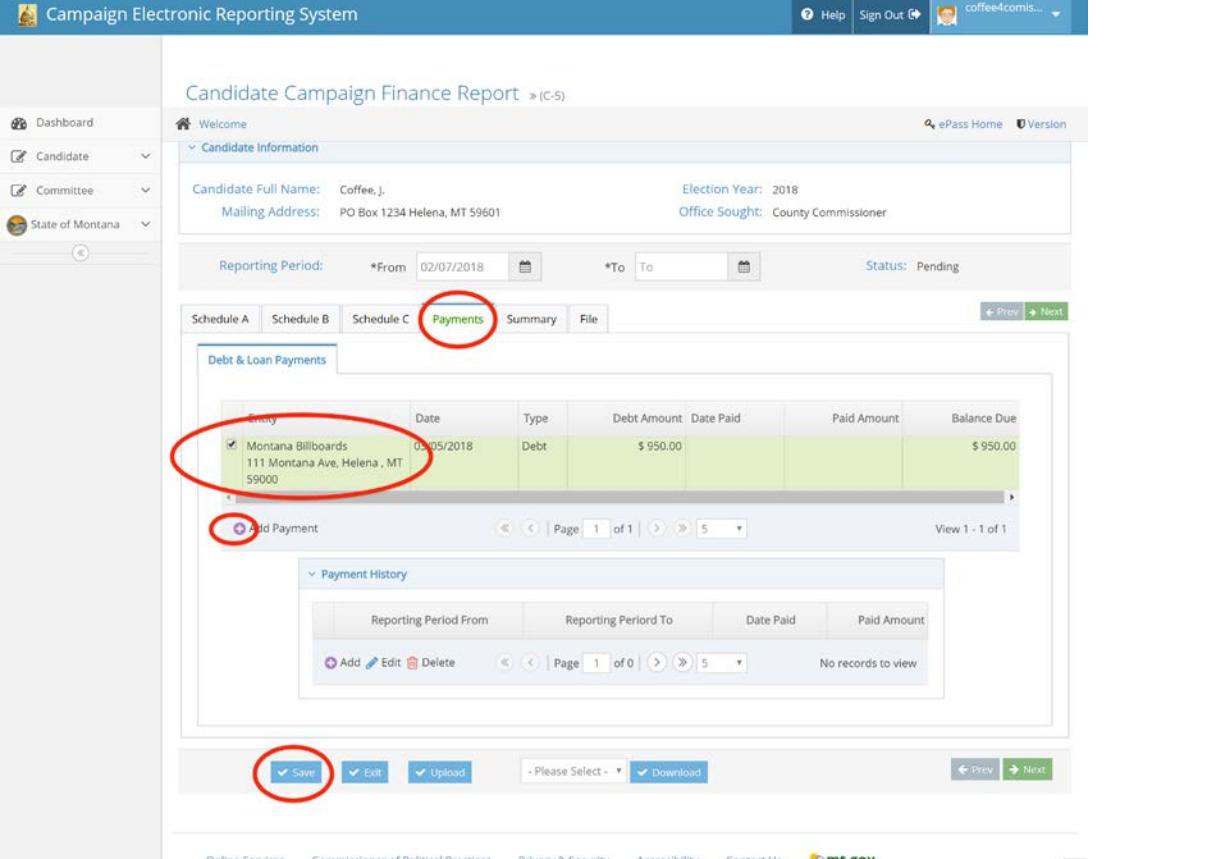
Prev Next

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# REPORT DEBTS & PAYMENTS

- COMMON REPORTING ERROR – WAITING FOR INVOICE
- REPORT EXPENSE WHEN INCURRED. IF INVOICED, REPORT AS DEBT (WITH SAME DETAIL AS AN EXPENDITURE)
- IF YOU DO NOT KNOW AMOUNT, ESTIMATE (YOU CAN AMEND IF NECESSARY)

# REPORT DEBTS & PAYMENTS



The screenshot shows the 'Candidate Campaign Finance Report' page. The 'Payments' tab is highlighted with a red circle. A second red circle highlights the 'Add Payment' button. A third red circle highlights the 'Save' button at the bottom. The table below shows a single entry for a debt payment to 'Montana Billboards'.

Entry	Date	Type	Debt Amount	Date Paid	Paid Amount	Balance Due
<input checked="" type="checkbox"/> Montana Billboards 111 Montana Ave, Helena, MT 59000	05/05/2018	Debt	\$ 950.00			\$ 950.00

- ADD PAYMENTS AS YOU MAKE THEM AGAINST LOANS, DEBTS

# REVIEW

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

[CPPHELP@MT.GOV](mailto:CPPHELP@MT.GOV)

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TWITTER - @MONTANACOPP



# ADDITIONAL REPORTING INFO

TIPS! – ADD CAMPAIGN FINANCE REPORTING PERIODS AND DATE/S TO SUBMIT REPORTS TO YOUR CALENDAR WITH REMINDERS (SMARTPHONE, PC, KITCHEN CALENDAR, WHATEVER HELPS REMIND YOU)

- UPDATE YOUR REPORTS REGULARLY THROUGH OUT THE PERIOD AND FILE AFTER THE END OF THE PERIOD AND BEFORE THE DEADLINE (DO NOT WAIT FOR LAST MINUTE TO FILE)

# CERTIFY & FILE

AFTER YOU CERTIFY AND FILE  
START A NEW CF REPORT FOR THE  
NEXT REPORTING PERIOD  
  
YOUR BALANCE WILL TRANSFER  
FROM PREVIOUS REPORT

Success! The Political Committee Finance Report was successfully saved for Montanans for better coffee

Welcome Committee Campaign Finance Report > (C-6)

Committee Information

Committee Full Name: Montanans for better coffee  
Mailing Address: PO Box 1234 Helena, MT 59601 Committee Type: Independent

Reporting Period: \*From 02/07/2018 \*To To Status: Pending

Schedule A Schedule B Schedule C Payments Summary File

Display contributors name and address that contributed < \$35? Receive and File Date 04/15/2018

Is this a closing report? For CLOSING the Committee Only

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

- Please Select -  [Prev](#) [Next](#)

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# UPLOAD

- UPLOAD OF SCHEDULE A AND B DATA IS AVAILABLE
- THERE ARE SPECIFIC TECHNICAL SPECIFICATIONS
  - FOLLOW ALL SPECIFICATIONS
  - MUST BE PRECISE
- EXCEL SPREADSHEET TEMPLATES
  - MUST USE TEMPLATES
- PLEASE CONTACT COPP FOR GUIDANCE AND ASSISTANCE
- THIS IS NOT A GENERAL UPLOAD FOR DOCUMENTS, PDF'S, ETC.

# REVIEW

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

[CPPHELP@MT.GOV](mailto:CPPHELP@MT.GOV)

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# FOLLOW-UP

WHAT TO EXPECT ONCE YOU FILE YOUR  
CAMPAIGN FINANCE REPORT

# INSPECTION REPORTS & EXAMS

- IT IS THE CANDIDATE/COMMITTEE'S RESPONSIBILITY TO REPORT CORRECTLY AND COMPLETELY
- THE COPP WILL PROVIDE GUIDANCE WITH CURSORY INSPECTION REPORTS
- MAKE REVISIONS AS REQUESTED

<p><b>CFR Compliance -</b></p> <p>Campaign Finance Report DATE: 9/14/2017</p> <p>Compliance Specialist: Scott Cook</p> <p>REFERENCE REPORT: 02/14/17-08/28/17</p> <p>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 cppcompliance@mt.gov. Thank you.</p> <p><input checked="" type="checkbox"/> Inspection</p> <p><input checked="" type="checkbox"/> Exam</p> <p><b>CONTRIBUTIONS Section / Issues</b></p> <table border="1"><thead><tr><th>Section</th><th>Item</th><th>Explanation / Notes</th></tr></thead><tbody><tr><td>Individual Contributors</td><td>Contributor Ford, Joe E has occupation listed as Consultant</td><td>More detail is required as to the occupation of this contributor; please + what is meant by Consulting</td></tr><tr><td>Individual Contributors</td><td>Contributor Martin, College has occupation listed as Fundraiser</td><td>More detail is required as to the occupation of this contributor; please + what is meant by Fundraiser</td></tr><tr><td>Individual Contributors</td><td>Contributor O'Connor, Roy S has occupation listed as Investor</td><td>More detail is required as to the occupation of this contributor; please + what is meant by Investor</td></tr><tr><td>Individual Contributors</td><td>Address missing for contributor Wakimoto, Ronald</td><td>Please provide the full mailing address for this contributor, as it is missing in the report</td></tr></tbody></table> <p><b>OTHER:</b></p> <p><b>EXPENDITURES Section / Issues</b></p> <table border="1"><thead><tr><th>Section</th><th>Item</th><th>Explanation / Notes</th></tr></thead><tbody><tr><td>Expenditures: Other</td><td>Brock Consulting LLC (5 total entries)</td><td>We need more detail for each of the 5 expenditures listed on the report purpose 'Campaign Services' - what were the specific services provided, what was the specific purpose of each expenditure?</td></tr><tr><td>Expenditures: Other</td><td>Monroe, Callie</td><td>We need more detail for this expense- what is included in the 'Event Entertainment' descriptor?</td></tr><tr><td>Expenditures: Other</td><td>United States Post Office (2 entries)</td><td>We need more detail as to what was included in the Postage expenditure 04/12/17 and 05/23/17?</td></tr></tbody></table> <p>CS3 (Scott) Page 1</p> <p>CS3 (Scott) Page 2</p>	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 + what is meant by Consulting	Individual Contributors	Contributor Martin, College has occupation listed as Fundraiser	More detail is required as to the occupation of this contributor; please + 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 + 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 missing in the report	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, what 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?
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# ORDER OF NONCOMPLIANCE AND FILED COMPLAINTS

- FAILURE TO RESPOND TO COPP FOR REQUESTED CFR REPORTING REVISIONS OR FAILURE TO FILE AS REQUIRED BY MCA MAY LEAD TO AN ORDER OF NON COMPLIANCE OR FACE POTENTIAL CAMPAIGN FINANCE VIOLATIONS THROUGH THE COMPLAINT PROCESS

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

**HAND DELIVERED**

**SIGNED/NOTARIZED**

## Campaign Finance and Practices

### Complaint Form (08/17)

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 \_\_\_\_\_, \_\_\_\_\_.

My Commission Expires:

Notary Public

# RESOURCES

## Politicalpractices.mt.gov

- Education & resource page
- Contribution limits
- Reporting calendars
- CERS Login

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[cpphelp@mt.gov](mailto:cpphelp@mt.gov)