

# CAMPAIGN FINANCE REPORTING

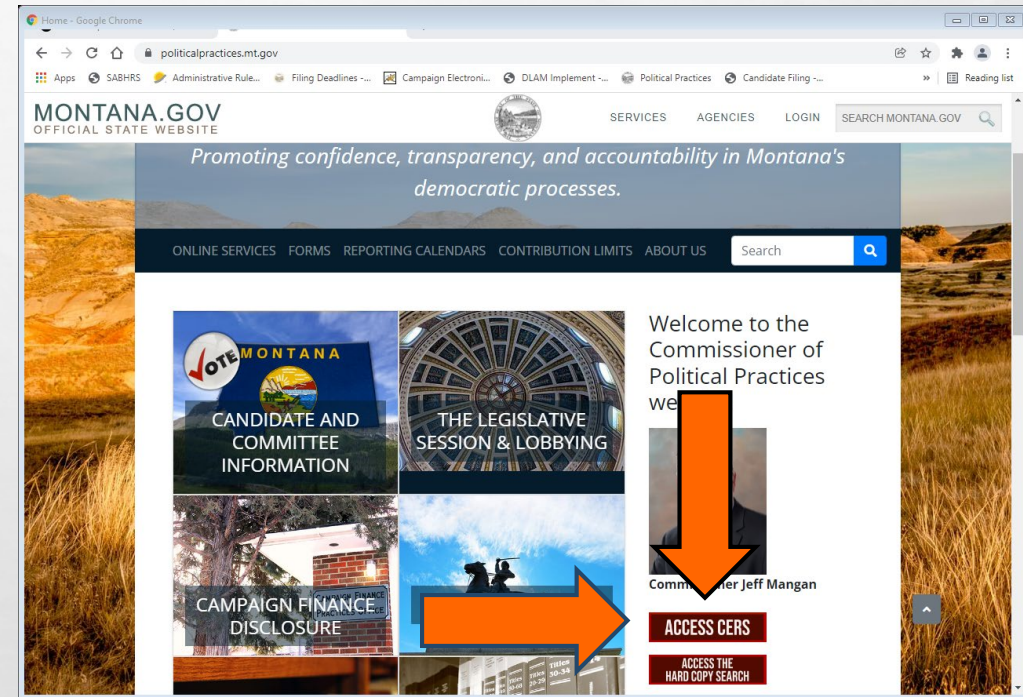
MONTANA COMMISSIONER OF POLITICAL PRACTICES

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



# FILE YOUR REPORT ELECTRONICALLY, USING CERS

- **ALL C-5 CAMPAIGN FINANCE REPORTS MUST BE FILED ELECTRONICALLY, USING THE CAMPAIGN ELECTRONIC REPORTING SYSTEM (CERS)**
- **ACCESS CERS FROM THE COPP'S WEBSITE, [HTTPS://POLITICALPRACTICES.MT.GOV/](https://politicalpractices.mt.gov/)**
  - **CLICK THE 'ACCESS CERS' ICON**



# ACCESSING CERS- STEPS

## 1. ACCESS MY ACCOUNTS

The screenshot shows the CERS dashboard with a sidebar on the left. A large blue arrow points to the 'Access My Accounts' button. The main content area displays 'Candidate and committee Activity for Election Year 2022' with various statistics and a 'Just Posted' section.

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

## 2. LOGIN USING EPASS

The screenshot shows the Montana.gov ePass login page. It features a 'Home » ePass Montana Login' header and a login form with fields for 'Username' and 'Password'. A 'Login' button is at the bottom. There is also a 'New User' section for creating an account.

## 3. SELECT CANDIDATE

The screenshot shows the CERS dashboard with the 'Candidate List' table. The table lists candidates with columns for Candidate Name, Year, Status, C-3, Address, Campaign, Office, and County. A 'Search' bar is at the top right of the table.

Candidate Name	Year	Status	C-3	Address	Campaign	Office	County
<input checked="" type="checkbox"/> Coffee, J.	2021	In Process	No	1209 8th Ave., Helena, MT 59601	City	Mayor	Lewis & Clark
<input type="checkbox"/> Coffee, J.	2020	In Process	Yes	PO Box 1234, Helena, MT 59601	County	County Commissioner	Lewis & Clark
<input type="checkbox"/> Coffee, J.	2018	Amended	No	PO Box 1234, Helena, MT 59601	County	County Commissioner	Lewis & Clark



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

Candidates Committees Access ID Search

Candidate List

Display 5 records

	Candidate Name	Year	Status	C-3	Address	Campaign
<input type="checkbox"/>	Knope (test account), Leslie E	2020	In Process	No	123 Test Drive way, Townsville, MT 12345	State District

Showing 1 to 1 of 1 entries

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

## Campaign Registration View

» Statement of Candidate (C1 or C1-A)

### ▼ Candidate Information

Candidate Full Name: Knope (test account), Leslie E

Mailing Address: 123 Test Drive way Townsville, MT 12345

Physical Address: 123 TEST Ave Helena, MT 59601

Home Phone: (406) 444-2942

Alternate Phone:

Campaign Email Address: leslie4mt@gmail.com

Election Year: 2020

Office Sought: House District No. 59

Political Party: Natural Law

Date Filed: 01/24/2020

Candidate Type: State District

Resident County: Carter

Current Status: In Process

Amended Date:

D1 Received Date:

C118 Received Date:

Reporting Status:

Bank Full Name: Bank Name

Bank Address: 123 Test Drive way Townsville, MT 12345

### ▼ Campaign Treasurer Information

**UPDATE YOUR STATEMENT OF CANDIDATE  
WITHIN 5 DAYS OF CHANGE!**

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



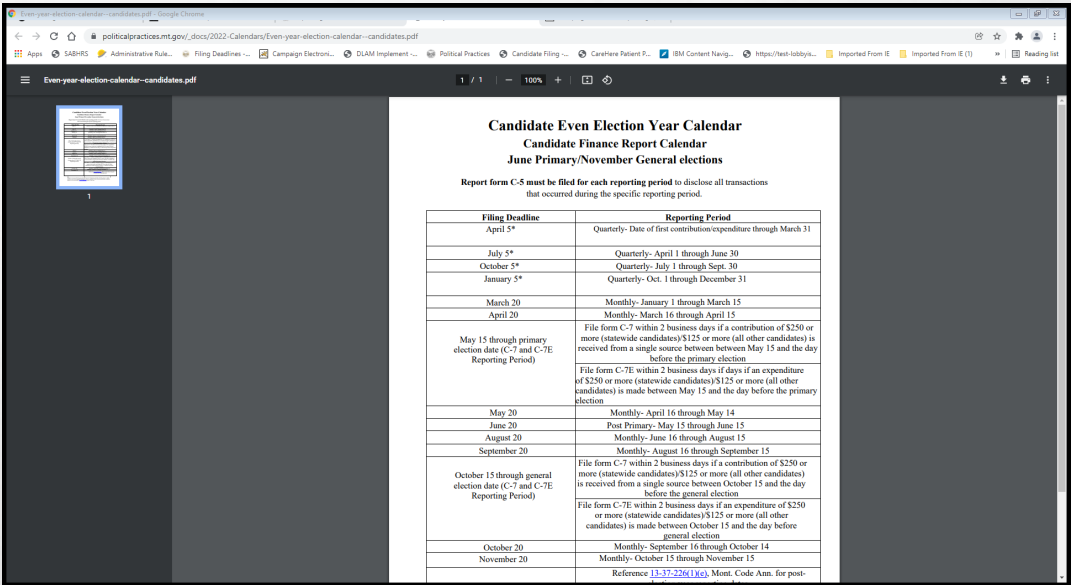


# REPORTING DATES

- **C-5 CAMPAIGN FINANCE REPORTS ARE DUE MARCH 20, APRIL 20, MAY 20, JUNE 20, AUGUST 20, SEPTEMBER 20, OCTOBER 20, AND NOVEMBER 20**
- **FULL REPORTING CALENDAR AVAILABLE ON THE REPORTING CALENDARS SECTION OF COPP WEBSITE**

**Even Years – Statewide, State District & County candidates**

**Note - School District & City (Odd years) candidates have different calendars – see reporting calendar tab on website**



The screenshot shows a PDF document titled "Candidate Even Election Year Calendar" and "Candidate Finance Report Calendar" for "June Primary/November General elections". It includes a note that "Report form C-5 must be filed for each reporting period to disclose all transactions that occurred during the specific reporting period." The document contains a table with filing deadlines and reporting periods.

Filing Deadline	Reporting Period
April 5*	Quarterly- Date of first contribution/expenditure through March 31
July 5*	Quarterly- April 1 through June 30
October 5*	Quarterly- July 1 through Sept. 30
January 5*	Quarterly- Oct. 1 through December 31
March 20	Monthly- January 1 through March 15
April 20	Monthly- March 16 through April 15
May 15 through primary election date (C-7 and C-7E Reporting Period)	File form C-7 within 2 business days if a contribution of \$250 or more (statewide candidates)/\$125 or more (all other candidates) is received from a single source between between May 15 and the day before the primary election File form C-7E within 2 business days if an expenditure of \$250 or more (statewide candidates)/\$125 or more (all other candidates) is made between May 15 and the day before the primary election
May 20	Monthly- April 16 through May 14
June 20	Post Primary- May 15 through June 15
August 20	Monthly- June 16 through August 15
September 20	Monthly- August 16 through September 15
October 15 through general election date (C-7 and C-7E Reporting Period)	File form C-7 within 2 business days if a contribution of \$250 or more (statewide candidates)/\$125 or more (all other candidates) is received from a single source between October 15 and the day before the general election File form C-7E within 2 business days if an expenditure of \$250 or more (statewide candidates)/\$125 or more (all other candidates) is made between October 15 and the day before the general election
October 20	Monthly- September 16 through October 14
November 20	Monthly- October 15 through November 15

Reference: [13-37-226\(1\)\(c\)](#), Mont. Code Ann. for post-

STATE OF MONTANA POLITICAL CAMPAIGN CONTRIBUTION  
LIMITS SUMMARY

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

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

**CANDIDATE**

To Own Campaign.....No Limit

**INDIVIDUAL Human Being**

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

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

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

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

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

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

**POLITICAL COMMITTEE**

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

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

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

**POLITICAL COMMITTEES [Excludes Political Party Committees]**

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

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

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

**POLITICAL PARTY COMMITTEE** Aggregate Limits from ALL political party committees

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

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

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

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

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

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

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

**CORPORATION OR UNION**

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

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

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

# CAMPAIGN CONTRIBUTION LIMITS

- **CANDIDATES LIMITED IN AMOUNT THEY CAN ACCEPT FROM CONTRIBUTORS**
  - **IN-KIND CONTRIBUTIONS COUNT TOWARDS THE CONTRIBUTION LIMITS**
  - **A CANDIDATE IS NOT LIMITED IN WHAT THEY CAN CONTRIBUTE TO THEIR OWN CAMPAIGN**
- **[HTTPS://POLITICALPRACTICES.MT.GOV/HOME/CONTRIBUTION-LIMITS](https://politicalpractices.mt.gov/home/contribution-limits)**

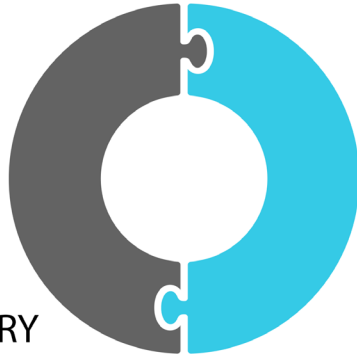


## Contribution limits apply to each election

*Contribution limits apply per election, which means that fundraising for the primary election and for the general election must be completely separate, and a candidate must therefore establish separate bank accounts for each election.*

### CONTESTED PRIMARY

*MCA 13-37-216(5), "... election means the general election or primary election that involves two or more candidates for the same nomination. **If there is not a contested primary, there is only one election to which the contribution limits apply.** If there is a contested primary, then there are two elections to which the contribution limits apply."*



### GENERAL

*Because these are separate elections, a candidate must properly report each contribution received as either a primary or general contribution, and the money raised for each election must be kept in separate campaign accounts*



Montana Commissioner  
of Political Practices

February 2018

# CONTRIBUTION LIMITS APPLY PER ELECTION!

- **"ELECTION" MEANS THE GENERAL ELECTION OR A PRIMARY ELECTION THAT INVOLVES TWO OR MORE CANDIDATES FOR THE SAME NOMINATION**
  - **IF YOU PARTICIPATE IN A CONTESTED PRIMARY, THEN THERE ARE TWO ELECTIONS TO WHICH THE CONTRIBUTION LIMITS COULD APPLY- PRIMARY AND GENERAL**
  - **IF YOU DO NOT PARTICIPATE IN A CONTESTED PRIMARY, THERE IS ONLY ONE ELECTION TO WHICH THE CONTRIBUTION LIMITS APPLY- GENERAL**

# CAMPAIGN ACCOUNT

- CANDIDATES “SHALL DESIGNATE ONE PRIMARY CAMPAIGN DEPOSITORY FOR THE PURPOSE OF DEPOSITING ALL CONTRIBUTIONS RECEIVED AND DISBURSING ALL EXPENDITURES MADE”, [13-37-205\(1\)](#), MCA
  - CAN HAVE A PRIMARY AND GENERAL ELECTION ACCOUNT
- *BEST PRACTICE IS TO RUN ALL CAMPAIGN ACTIVITY DIRECTLY THROUGH THE CAMPAIGN BANK ACCOUNT!*
  - IF SELF-FUNDING YOUR OWN CAMPAIGN, DEPOSIT FUNDS IN A DEDICATED CAMPAIGN BANK ACCOUNT
  - ACQUIRE A DEBIT OR CREDIT CARD TIED TO THE CAMPAIGN BANK ACCOUNT TO USE FOR ALL EXPENDITURES
  - EXCLUSIVE USE OF THE CAMPAIGN BANK ACCOUNT FOR CAMPAIGN ACTIVITY IS EASIEST WAY TO TRACK ALL CONTRIBUTIONS RECEIVED, EXPENDITURES MADE, AND OBLIGATIONS OWED BY THE CAMPAIGN





# REPORTING CONTRIBUTIONS- PRIMARY AND GENERAL

- **LEGISLATIVE CANDIDATES:** IF PARTICIPATING IN A CONTESTED PRIMARY, PRIMARY AND GENERAL ELECTION CONTRIBUTIONS MAY BE DEPOSITED INTO THE SAME ACCOUNT IF:
  - THE CANDIDATE MAINTAINS RECORDS CONCERNING WHETHER CONTRIBUTIONS WERE DESIGNATED FOR THE PRIMARY OR GENERAL ELECTION, AND
  - THE BALANCE IN THE ACCOUNT DOES NOT DROP BELOW THE AMOUNT OF GENERAL ELECTION CONTRIBUTIONS RECEIVED UNTIL AFTER THE PRIMARY ELECTION
- IF NOT PARTICIPATING IN A CONTESTED PRIMARY, ALL CONTRIBUTIONS IN ONE ACCOUNT

# REPORTING CONTRIBUTIONS- PRIMARY AND GENERAL

- **ALL OTHER CANDIDATES:** IF PARTICIPATING IN A CONTESTED PRIMARY, PRIMARY AND GENERAL ELECTION CONTRIBUTIONS NEED TO BE SEPARATED
  - PRIMARY ELECTION CONTRIBUTIONS IN PRIMARY ELECTION ACCOUNT
  - GENERAL ELECTION CONTRIBUTIONS IN GENERAL ELECTION ACCOUNT
- IF NOT PARTICIPATING IN A CONTESTED PRIMARY, ALL CONTRIBUTIONS IN ONE ACCOUNT



# FILING A C-5 CAMPAIGN FINANCE REPORT

## STEP 1

### ACCESS THE C-5 REPORT

The screenshot shows the CERS interface with the 'Candidate Report List' tab selected. The list displays several reports with columns for From, To, Report Title, Type, Status, and Report. The first report is 'Notice of Pre-Election Contributions' (Type: C7, Status: Incorporated, Report: Initial). The second is 'Candidate Campaign Finance Report' (Type: C5, Status: Pending, Report: Periodic). The third is 'Candidate Campaign Finance Report' (Type: C5, Status: Filed, Report: Periodic). The fourth is 'Candidate Campaign Finance Report' (Type: C5, Status: Amended, Report: Periodic). The fifth is 'Candidate Campaign Finance Report' (Type: C5, Status: Pending-Amended, Report: Periodic). The interface includes a search bar, a 'Display' dropdown, and a 'Records' count. At the bottom, there are buttons for 'New Report', 'Update or Amend Report', 'Add New C5', 'Add New C7', 'Go Back', and 'File'.

## STEP 2

### REPORT CONTRIBUTIONS RECEIVED, EXPENDITURES MADE, DEBTS OWED, AND PAYMENTS

The screenshot shows the 'Candidate Campaign Finance Report (C-5)' form. The 'Candidate Information' section includes 'Candidate Full Name: Coffey, J.' and 'Election Year: 2021'. The 'Mailing Address' is '1200 8th Ave. Helena, MT 59601' and the 'Office Sought' is 'Mayor'. The 'Reporting Period' is set from '10/15/2021' to '11/15/2021' with a status of 'Pending'. The 'Contributions' tab is selected, showing a table with columns for Entity, Election Type, Occupation, Employer, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date. The first entry is for 'Coffey, Scott' (General, Compliance Specialist, COPS-Montana, 10/16/2021) with a Cash/Check Amount of \$100.00 and an In-Kind Value of \$0.00. The interface includes a 'Save' button, a 'Cancel' button, a 'Please Select...' dropdown, a 'Download' button, and a 'Reminders Close Load' button.

## STEP 3

### CERTIFY AND FILE THE REPORT

The screenshot shows the 'Candidate Campaign Finance Report (C-5)' form with the 'Certify and File' section. The 'Candidate Information' section is the same as in Step 2. The 'Reporting Period' is the same. The 'Certify and File' section includes a checkbox for 'Check this box to display the name and address of contributors who have contributed less than \$50.' and a 'Receive and File Date' of '12/14/2021'. A yellow warning box states: 'Only End of Campaign: A closing report should be filed only when all debts and obligations are settled and no further financial activity will occur in the candidate's campaign (MCA 13-35-2203). Check this box ONLY if this is the candidate's closing report.' The interface includes a 'Certify and File' button and a 'File' button.

# STEP 1: ACCESS THE C-5 REPORT

The screenshot shows the Campaign Electronic Reporting System (CERS) interface. The top navigation bar includes 'Sign Out' and a user profile. The left sidebar shows 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The main content area has a 'Welcome' message and instructions. Below the instructions is a 'Candidate Report List' table. The table has columns for 'From', 'To', 'Report Title', 'Type', 'Status', and 'Report'. The table shows 7 entries. At the bottom of the table, there are buttons: 'View Report', 'Update or Amend Report', 'Add New C5', 'Add New C7', 'Add New C/E', 'Go Back', and 'Exit'. A green arrow points to the 'Update or Amend Report' button, and a blue arrow points to the 'Add New C5' button.

	From	To	Report Title	Type	Status	Report
<input type="checkbox"/>	10/16/2021	10/17/2021	Notice of Pre-Election Contributions	C7	Incorporated	Initial
<input type="checkbox"/>	10/15/2021	11/15/2021	Candidate Campaign Finance Report	C5	Pending	Periodic
<input type="checkbox"/>	09/16/2021	10/14/2021	Candidate Campaign Finance Report	C5	Filed	Periodic
<input type="checkbox"/>	08/15/2021	09/15/2021	Candidate Campaign Finance Report	C5	Amended	Periodic
<input type="checkbox"/>	07/16/2021	08/14/2021	Candidate Campaign Finance Report	C5	Amended	Periodic

Showing 1 to 5 of 7 entries

Buttons: View Report, Update or Amend Report, Add New C5, Add New C7, Add New C/E, Go Back, Exit

- **NAVIGATE TO THE CANDIDATE REPORT LIST**
- **SELECT 'ADD NEW C5' TO BEGIN A NEW C-5 CAMPAIGN FINANCE REPORT; SELECT 'UPDATE OR AMEND REPORT' TO UPDATE OR AMEND AN EXISTING REPORT**
- **BEST PRACTICE IS TO UPDATE THE REPORT REGULARLY AS CONTRIBUTIONS ARE RECEIVED AND EXPENDITURES MADE**
  - **DATA IS NOT PUBLIC UNTIL A REPORT IS FILED**



# ACCESS THE C-5 REPORT

- **CHECK THE REPORTING PERIOD ON YOUR C-5 REPORT! CAMPAIGN ACTIVITY OUTSIDE THIS WINDOW MAY CAUSE ERROR**
  - **FROM**= BEGINNING DATE FOR THE REPORTING PERIOD
  - **TO**= END DATE FOR THE REPORTING PERIOD
- **REPORTING PERIODS FOR EACH REPORT ARE INCLUDED ON THE COPP'S REPORTING CALENDARS PAGE**

The screenshot shows the 'Candidate Campaign Finance Report' form in the Campaign Electronic Reporting System. The form includes fields for 'Candidate Full Name' (Coffee, J.), 'Mailing Address' (1209 8th Ave., Helena, MT 59601), and 'Reporting Period' (\*From 10/15/2021, \*To 11/15/2021). The 'Status' is 'Pending'. The 'Contributions' tab is selected, showing a table of contributions. A yellow arrow points to the 'Reporting Period' section, and a red arrow points to the 'Contributions' tab.

Type	Occupation	Employer	Date	Cash/Check Amount	In-Kind Value	In-Kind Description	Total to Date
Individual	Compliance Specialist	COPP-Montana	10/16/2021	\$ 180.00	\$ 0.00		\$ 0.00 (P) \$ 180.00 (G)

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





# REPORTING CONTRIBUTIONS RECEIVED

- *ANONYMOUS CONTRIBUTIONS NOT ALLOWED!!*
- REPORT ALL CONTRIBUTIONS RECEIVED USING THE 'CONTRIBUTIONS' TAB
- SIX TYPES OF CONTRIBUTORS:
  - INDIVIDUALS
  - COMMITTEES
  - FUNDRAISERS
  - REFUNDS, ETC.
  - LOANS
  - CANDIDATE CONTRIBUTIONS





# REPORTING CONTRIBUTIONS RECEIVED

- **MONETARY CONTRIBUTIONS:**

- **CASH/CHECK FOR DEPOSIT**

- **IN-KIND CONTRIBUTIONS:**

- **ITEMS OR SERVICES OF VALUE PROVIDED TO THE CAMPAIGN**
- **NOT CASH/CHECK DEPOSITED**

# ADDING INDIVIDUAL CONTRIBUTIONS

The screenshot shows the CERS web application. The main header is 'Campaign Electronic Reporting System'. The left sidebar contains navigation links: Dashboard, Candidate, Committee, and State of Montana. The main content area is titled 'Campaign Finance Report'. It displays candidate information: Name: Coffee, J, Election Year: 2021, Office Sought: Mayor, and Address: 1209 8th Ave, Helena, MT 59601. Below this, there are filters for Reporting Period (From: 07/16/2021, To: 08/14/2021) and Status (Pending-Amended). The 'Contributions' tab is selected, showing subtabs: Individuals, Committee, Fundraiser, Refunds, Etc, Loan, Self-Contribution, and Help. The 'Individuals' subtab is active, displaying a table with columns: Entity, Election Type, Occupation, Employer, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date. An 'Add' button is highlighted with a red star. At the bottom, there are buttons for Save, Export, Download, and Template Data Load.

- **INDIVIDUAL CONTRIBUTION= CONTRIBUTION RECEIVED FROM AN INDIVIDUAL OTHER THAN THE CANDIDATE**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'INDIVIDUALS' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW INDIVIDUAL CONTRIBUTION**

# ADDING INDIVIDUAL CONTRIBUTIONS

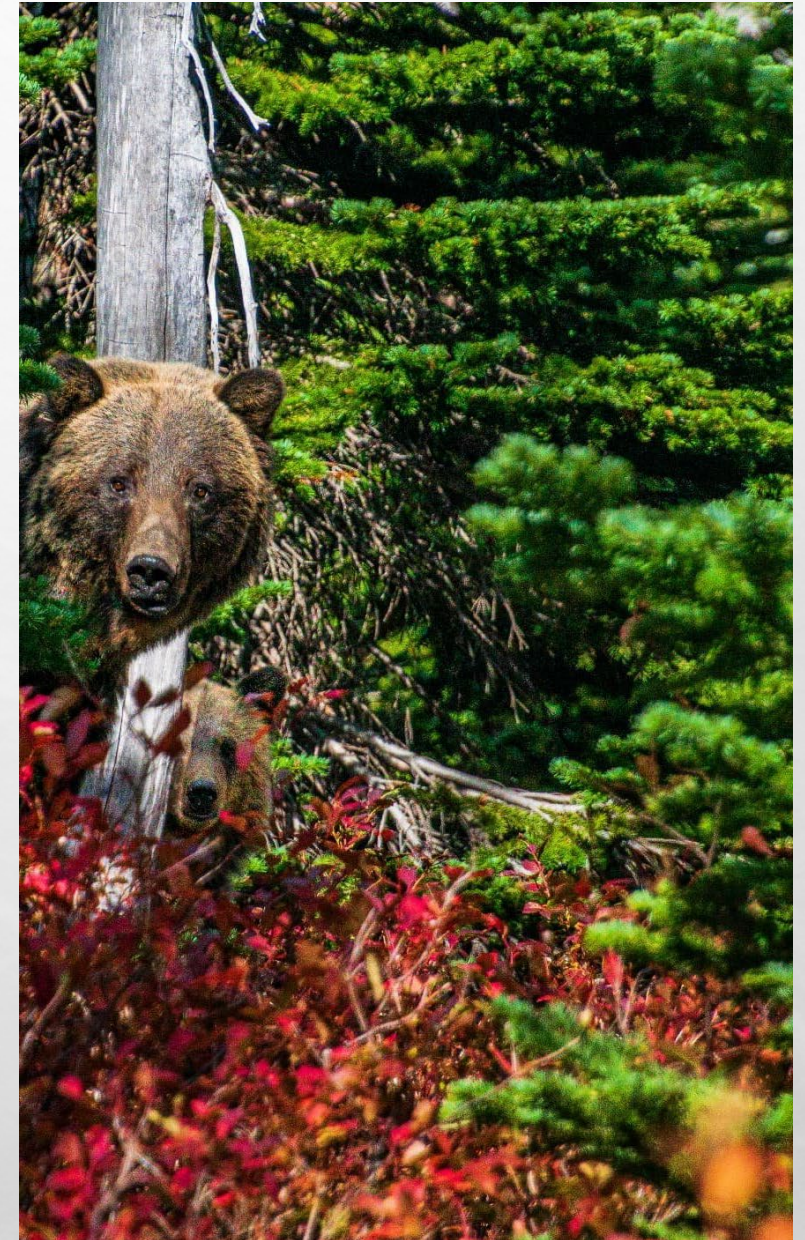
The screenshot shows the 'Edit Individual Contributors' page in the CERS system. The page has a sidebar with navigation links: Dashboard, Candidate, Committee, and State of Montana. The main content area is titled 'Edit Individual Contributors' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)'. There are two tabs: 'Row Details' and 'Entity Search'. The 'Row Details' tab is active, showing a form for entering contribution details. The form includes sections for 'Report Period' (From Date: 07/16/2021, To Date: 08/14/2021) and 'Report Detail Entry'. The 'Report Detail Entry' section contains fields for Election Type, Date, Last Name, First/Middle Initial, Address, City/State/Zip, Employer, Occupation, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date Primary. The 'Total to Date Primary' field shows a total of \$0.00. The form is styled with a light blue header and a white body, with a dark blue sidebar.

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



# ADDING INDIVIDUAL CONTRIBUTIONS

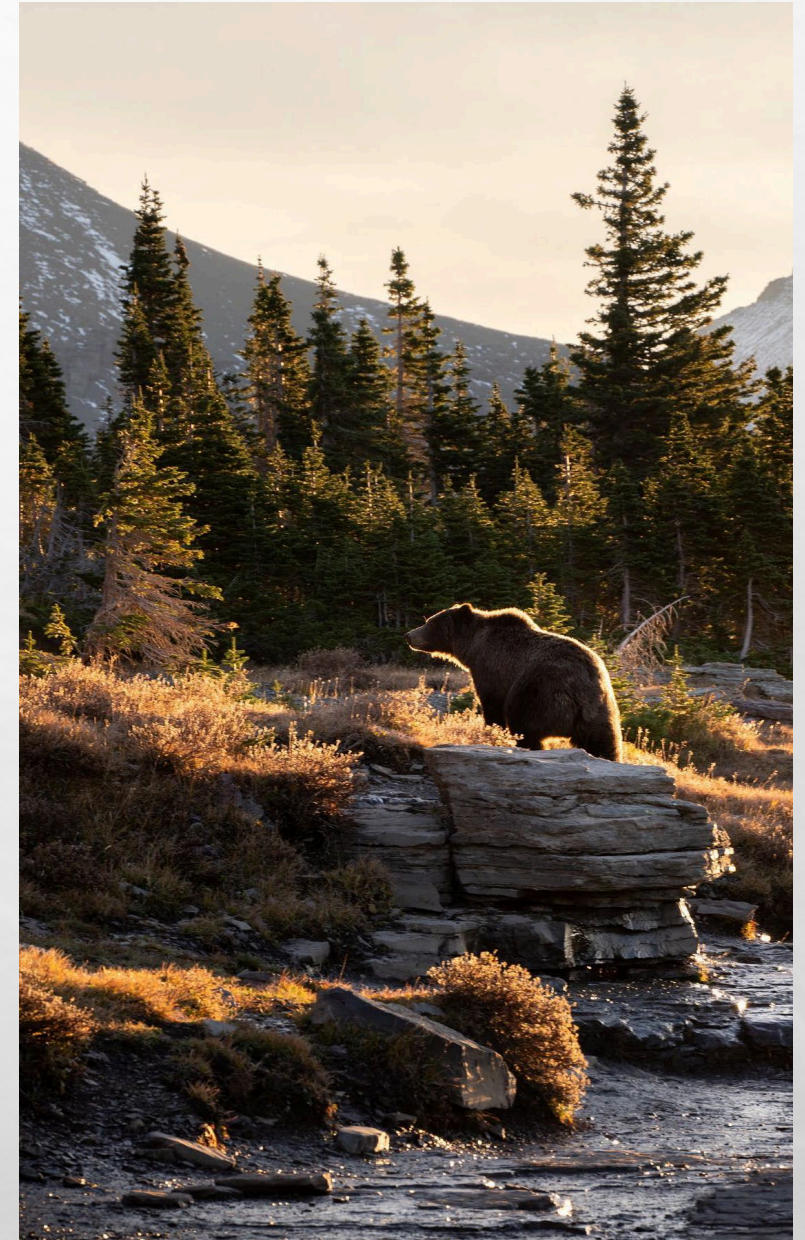
- REMINDER- ANONYMOUS CONTRIBUTIONS ARE PROHIBITED!
- ALL CONTRIBUTORS WHOSE AGGREGATE (TOTAL) CONTRIBUTIONS ARE \$50 OR MORE MUST BE REPORTED WITH THE CONTRIBUTOR'S FULL NAME, ADDRESS, OCCUPATION, AND EMPLOYER
  - OCCUPATION- BE SPECIFIC! FOR EXAMPLE: 'FINANCIAL CONSULTANT' OR 'IT CONSULTANT' INSTEAD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



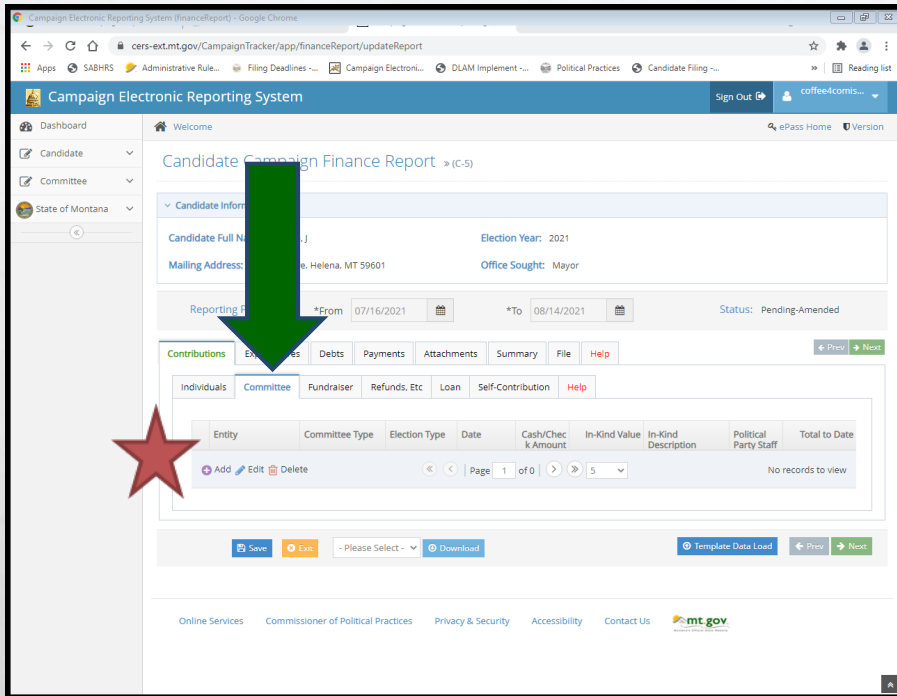


# ADDING INDIVIDUAL CONTRIBUTIONS

- FOR CONTRIBUTIONS RECEIVED VIA AN ONLINE PLATFORM (ACTBLUE, WIN RED, PAYPAL, ETC.), REPORT THE FULL AMOUNT OF THE CONTRIBUTION PROVIDED BY CONTRIBUTOR
  - REPORT USING THE NAME OF THE ORIGINAL CONTRIBUTOR, NOT THE ONLINE PLATFORM
  - ANY PROCESSING FEE PAID BY THE CONTRIBUTOR MUST BE REPORTED AS AN IN-KIND CONTRIBUTION RECEIVED



# ADDING COMMITTEE CONTRIBUTIONS



The screenshot displays the 'Candidate Campaign Finance Report' page in the CERS system. A green arrow points to the 'Committee' subtab, and a red star highlights the 'Add' button in the table header. The table has columns for Entity, Committee Type, Election Type, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, Political Party Staff, and Total to Date. The page also includes a sidebar with navigation links, a top navigation bar, and a footer with contact information.

Entity	Committee Type	Election Type	Date	Cash/Check Amount	In-Kind Value	In-Kind Description	Political Party Staff	Total to Date
No records to view								

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



# ADDING COMMITTEE CONTRIBUTIONS

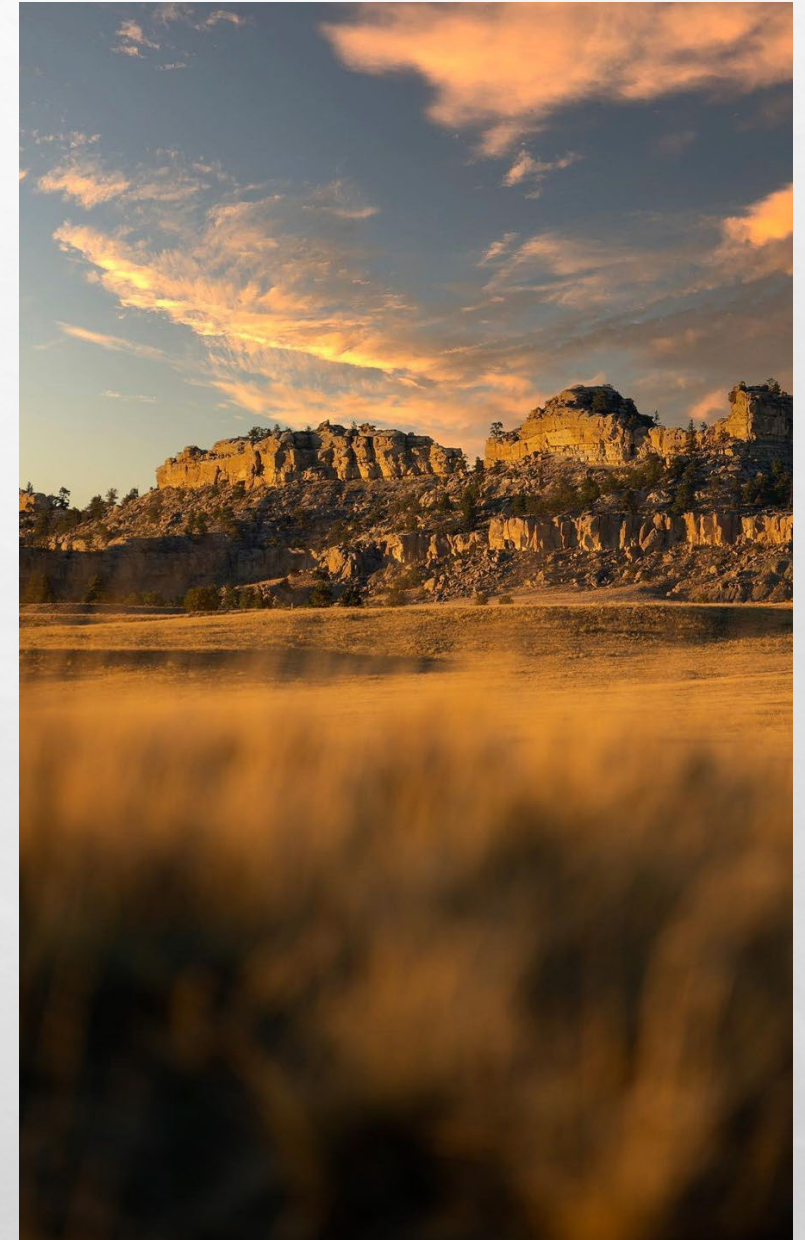
The screenshot shows the 'Edit Committee Contributions' form in the CERS system. The form is titled 'Edit Committee Contributions' and includes a tip: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals,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

- Report Period:** From Date: 07/16/2021, To Date: 08/14/2021
- Report Detail Entry:**
  - Election Type: - Please Select -
  - Date: [Date field]
  - Committee Type: - Please Select -
  - Committee Name: [Text field]
  - Address: [Text field]
  - City/State/Zip: [City field], [State dropdown], [Zip Code field]
  - Cash/Check Amount: \$ [Text field]
  - In-Kind Value: \$ [Text field]
  - In-Kind Description: [Text field]
  - Total to Date Primary: \$ [Text field]
  - Total to Date General: \$ [Text field]

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

# ADDING COMMITTEE CONTRIBUTIONS

- COMMITTEE TYPES: BALLOT ISSUE, INCIDENTAL, INDEPENDENT (PAC), POLITICAL PARTY
- AGGREGATE LIMIT FOR POLITICAL PARTY COMMITTEE CONTRIBUTIONS



# ADDING FUNDRAISER CONTRIBUTIONS

The screenshot shows the CERS interface for a candidate's campaign finance report. The 'Contributions' tab is selected, and the 'Fundraiser' subtab is active. A green arrow points to the 'Fundraiser' subtab, and a red star highlights the 'Add' button. The table below shows no records to view.

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

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



# ADDING FUNDRAISER CONTRIBUTIONS

The screenshot shows the 'Edit Fundraisers' form in the Campaign Electronic Reporting System (CERS). The form is titled 'Edit Fundraisers' and is located at 'cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport'. The form is divided into several sections:

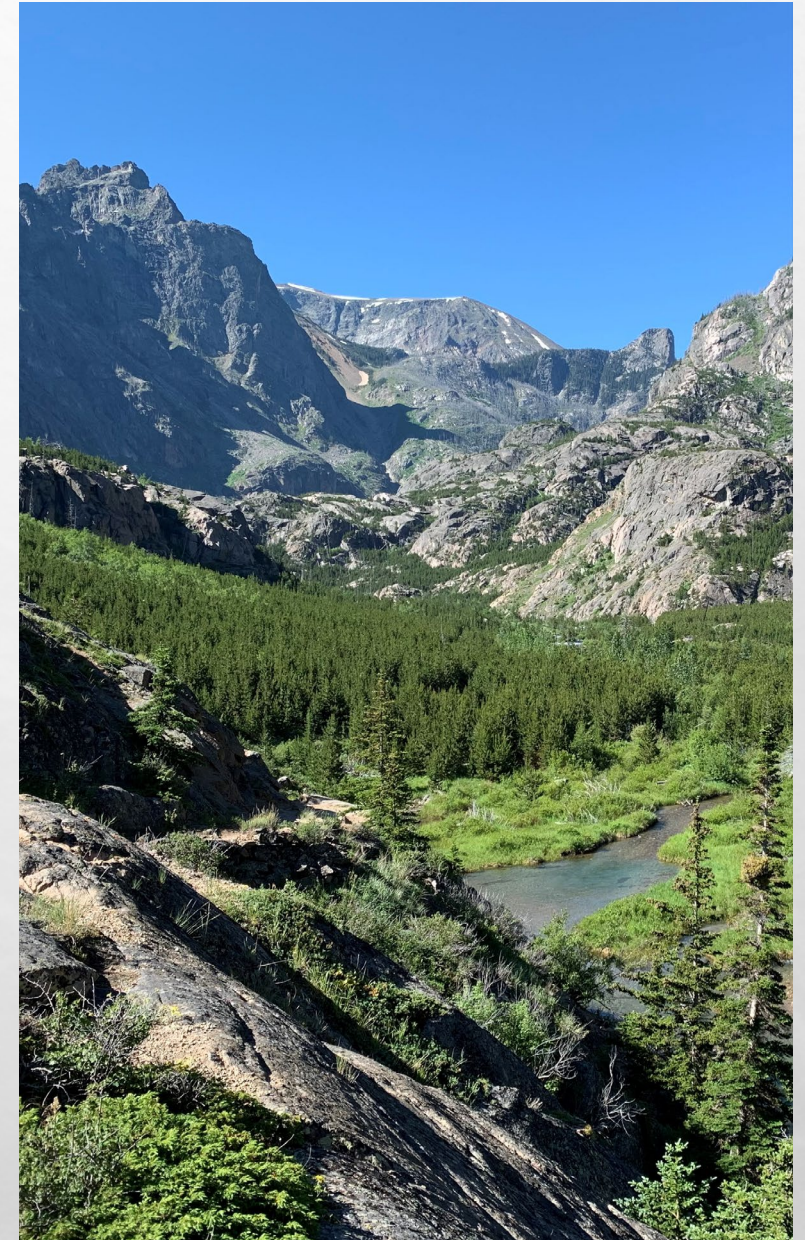
- Report Period:** Includes 'From Date' (07/16/2021) and 'To Date' (08/14/2021).
- Report Detail Entry:** This section contains the following fields:
  - Election Type:** A dropdown menu with the option '- Please Select -'.
  - Date of Fundraiser:** A date field with a calendar icon.
  - Name of Fundraiser:** A text field with a placeholder example: 'e.g. Raffle for candidate Potter, Prairie County Federalist's spaghetti feed, Annual Carbon County Republicans gala, etc.'
  - Location (Venue, City):** A text field with a placeholder 'Venue, City'.
  - Number of Attendees:** A text field with a placeholder 'Number of participants involved'.
  - Number of Tickets Sold:** A text field with a placeholder 'If applicable, disclose number of tickets sold'.
  - Cash/Check Amount:** A text field with a dollar sign icon and a placeholder 'Cash/Check Amount'.
  - In-Kind Value:** A text field with a dollar sign icon and a placeholder 'In-Kind Value'.
  - In-Kind Description:** A text field with a placeholder 'Description of In-Kind Contribution'.
  - Total to Date Primary:** A text field with a dollar sign icon and a placeholder 'Total to Date Primary'.
  - Total to Date General:** A text field with a dollar sign icon and a placeholder 'Total to Date General'.

At the bottom of the form, there is a note: 'Each unique fundraiser activity must be reported as an individual fundraising activity. For example, if you held a fundraising dinner that also had a silent auction and a pass-the-hat activity, that represents three required reporting activities (dinner, silent auction, pass-the-hat). Fundraisers held on private property are not considered contributions.'

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

# ADDING FUNDRAISER CONTRIBUTIONS

- THE FUNDRAISER SUBTAB IS MEANT ONLY FOR CONTRIBUTIONS OF LESS THAN \$50.00 RECEIVED AT A SINGLE MASS COLLECTION EVENT
  - EXAMPLES: A PASS THE HAT GATHERING, CAMPAIGN RAFFLE, OR SILENT AUCTION EVENT
- ANY CONTRIBUTION OF \$50.00 OR MORE MUST BE REPORTED USING THE 'INDIVIDUALS' TAB, EVEN IF THE CONTRIBUTION IS RECEIVED AT A MASS COLLECTION EVENT
  - SEE COPP [GUIDANCE](#) ABOUT REPORTING CONTRIBUTIONS RECEIVED AT FUNDRAISER EVENTS





# ADDING FUNDRAISER CONTRIBUTIONS

- REPORT EACH INDIVIDUAL MASS COLLECTION EVENT SEPARATELY
  - WHEN REPORTING A FUNDRAISER, THE DATE OF THE EVENT, THE LOCATION OF THE EVENT, AND THE NUMBER OF ATTENDEES/TICKETS SOLD MUST BE INCLUDED
- CAMPAIGN MUST KNOW NAME OF ANY CONTRIBUTOR- ANONYMOUS CONTRIBUTIONS NOT ALLOWED!





# REFUNDS, ETC.

The screenshot shows the CERS web application. The left sidebar contains navigation links for Dashboard, Candidate, Committee, and State of Montana. The main content area is titled 'Candidate Campaign Financial Report' and includes a 'Candidate Information' section with fields for Name, Address, Election Year, and Office Sought. Below this is a 'Reporting Period' section with date pickers and a 'Status' dropdown. The 'Contributions' tab is selected, and the 'Refunds, Etc.' subtab is highlighted. A table with columns for Entity, Election Type, Transaction Type, Previous Trans, Original Transaction, Original Transaction, Original Transaction, Date, and Cash/Check Amount is visible. The 'Add' button is highlighted with a red star. At the bottom, there are buttons for Save, Export, Download, Template Data Load, Prev, and Next.

- **REFUNDS, ETC.= REFUNDS, REBATES, OR OTHER INDIRECT CONTRIBUTIONS RECEIVED BY THE CAMPAIGN**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE ‘REFUNDS, ETC.’ SUBTAB**
- **CLICK ‘ADD’ TO ADD A NEW REFUND, ETC.**
- **SAVE AFTER EVERY ENTRY!**

# REFUNDS, ETC.

The screenshot shows a web browser window with the URL `cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport`. The page title is "Campaign Electronic Reporting System (financeReport)". The left sidebar shows a navigation menu with "Dashboard", "Candidate", "Committee", and "State of Montana". The main content area is titled "Edit Refunds, Etc." and includes a tip: "TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)." Below the tip are two tabs: "Row Details" (selected) and "Entity Search". The "Row Details" tab contains a form with the following fields: "Report Period" (From Date: 10/15/2021, To Date: 11/15/2021), "Report Detail Entry" (Entity Type: - Please Select -, Election Type: - Please Select -, Date: Date, Entity or Last Name: Entity or Last Name, First/Middle Initial: First Name, Middle Initial, Address: Street Address, City/State/Zip: City, - Please Select -, Zip Code, Cash/Check Amount: \$ Cash/Check Amount, Transaction Type: - Please Select -, Was this from a Previous Transaction? checkbox).

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

# REFUNDS, ETC.

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





# CANDIDATE CONTRIBUTION VS. CANDIDATE LOAN

- **CANDIDATE CONTRIBUTION**

- **REPORT USING THE 'SELF-CONTRIBUTION' SUBTAB**
- **CAMPAIGN CANNOT REIMBURSE OR OTHERWISE PAY BACK SELF-CONTRIBUTIONS AT ANY TIME**

- **CANDIDATE LOAN**

- **REPORT USING THE 'LOANS' SUBTAB**
- **CAMPAIGN CAN REIMBURSE OR OTHERWISE PAY BACK**
- **DOES NOT NEED TO BE PAID BACK IN FULL- CANDIDATE CAN FORGIVE AN OUTSTANDING BALANCE**

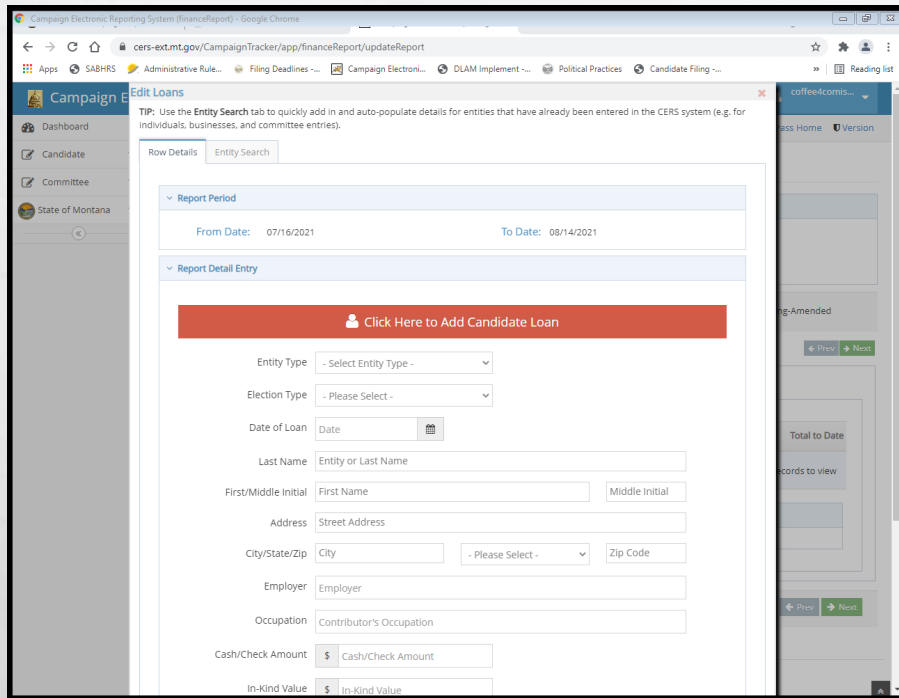
# ADDING A LOAN

The screenshot shows the CERS web application. The main heading is 'Candidate Campaign Finance Report'. Below it, there's a 'Candidate Information' section with fields for 'Candidate Full Name' (Coffee, J), 'Mailing Address' (1209 8th Ave, Helena, MT 59601), 'Election Year' (2021), and 'Office Sought' (Mayor). The 'Reporting Period' is set from 07/16/2021 to 08/14/2021, and the status is 'Pending-Amended'. A green arrow points to the 'Loans' subtab in the 'Contributions' section. A red star highlights the 'Add' button in the table header. The table has columns for Entity, Election Type, Occupation, Employer, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date. The table is currently empty, showing 'No records to view'.

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

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

# ADDING A LOAN



**Entity Search**

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

Row Details Entity Search

Report Period

From Date: 07/16/2021 To Date: 08/14/2021

Report Detail Entry

[Click Here to Add Candidate Loan](#)

Entity Type: - Select Entity Type -

Election Type: - Please Select -

Date of Loan:

Last Name:

First/Middle Initial:

Address:

City/State/Zip:  - Please Select -

Employer:

Occupation:

Cash/Check Amount:

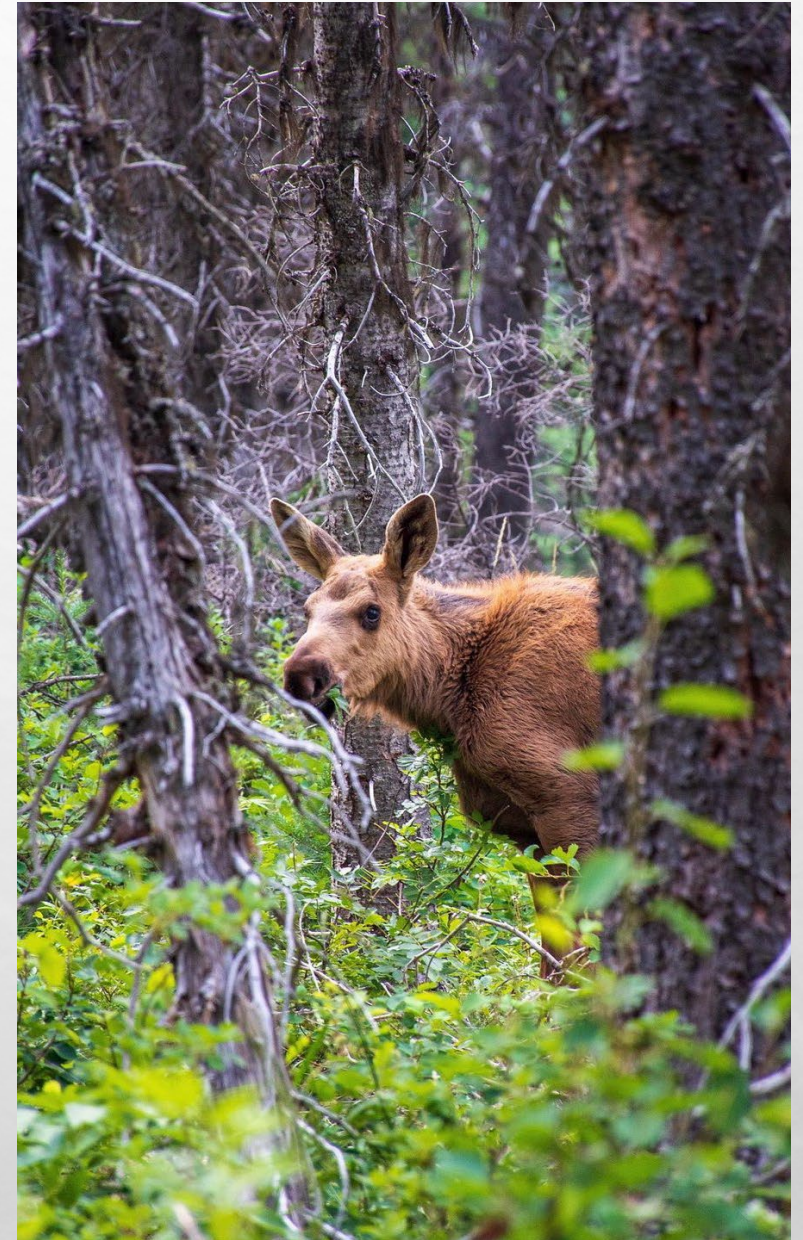
In-Kind Value:

- **USE 'ROW DETAILS' TO MANUALLY ENTER**
- **'ENTITY SEARCH' ALLOWS YOU TO SEARCH FOR CONTRIBUTOR**
  - **IF CANDIDATE LOAN, SIMPLY CLICK THE 'CLICK HERE TO ADD CANDIDATE LOAN' ICON**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**



# ADDING A LOAN

- BY DEFINITION, ANY LOAN TO A CAMPAIGN IS A CONTRIBUTION- [44.11.405, ARM](#)
  - CONTRIBUTION LIMITS APPLY TO CAMPAIGN LOANS
- ANY LOAN (REGARDLESS OF AMOUNT) MADE TO THE CAMPAIGN DURING A REPORTING PERIOD IS REPORTED USING THE “LOANS” TAB. THIS INCLUDES PERSONAL LOANS MADE BY A CANDIDATE TO THEIR CAMPAIGN



# ADDING A CANDIDATE CONTRIBUTION

The screenshot shows the 'Candidate Campaign Finance Report' page in the CERS system. The page includes a sidebar with navigation links for Dashboard, Candidate, Committee, and State of Montana. The main content area displays 'Candidate Information' for 'Coffee, J.' and 'Reporting Period' from 07/16/2021 to 07/16/2021. Below this, there are tabs for 'Contributions', 'Expenditures', 'Debts', 'Payments', 'Attachments', 'File', and 'Help'. The 'Contributions' tab is active, and within it, the 'Self-Contribution' subtab is selected. A table with columns 'Election Type', 'Cash/Check Amount', 'In-Kind Value', 'In-Kind Description', and 'Total to Date' is shown. The 'Add' button is highlighted with a red star. A green arrow points to the 'Self-Contribution' subtab. The page also includes a 'Save' button, a 'Download' button, and a footer with links to 'Online Services', 'Commissioner of Political Practices', 'Privacy & Security', 'Accessibility', and 'Contact Us'.

- **CANDIDATE CONTRIBUTION= CONTRIBUTION MADE BY THE CANDIDATE TO OWN CAMPAIGN**
- **UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'SELF-CONTRIBUTION' SUBTAB**
- **CLICK 'ADD' TO ADD A NEW CANDIDATE CONTRIBUTION**



# ADDING A CANDIDATE CONTRIBUTION

The screenshot displays the 'Edit Candidate Contributions' form within the CERS-CERS web application. The form is titled 'Row Details' and contains the following sections:

- Report Period:** Includes 'From Date' (07/16/2021) and 'To Date' (08/14/2021).
- Report Detail Entry:** Contains several input fields:
  - Election Type:** A dropdown menu with '- Please Select -'.
  - Cash/Check Amount:** A text input field with a '\$' symbol.
  - In-Kind Value:** A text input field with a '\$' symbol.
  - In-Kind Description:** A text input field with the placeholder 'Description of In-Kind Contribution'.
  - Total to Date Primary:** A text input field with a '\$' symbol.
  - Total to Date General:** A text input field with a '\$' symbol.

At the bottom of the form, there are two buttons: a green 'Submit' button and an orange 'Cancel' button. The background shows the CERS-CERS dashboard with a sidebar menu and a top navigation bar.

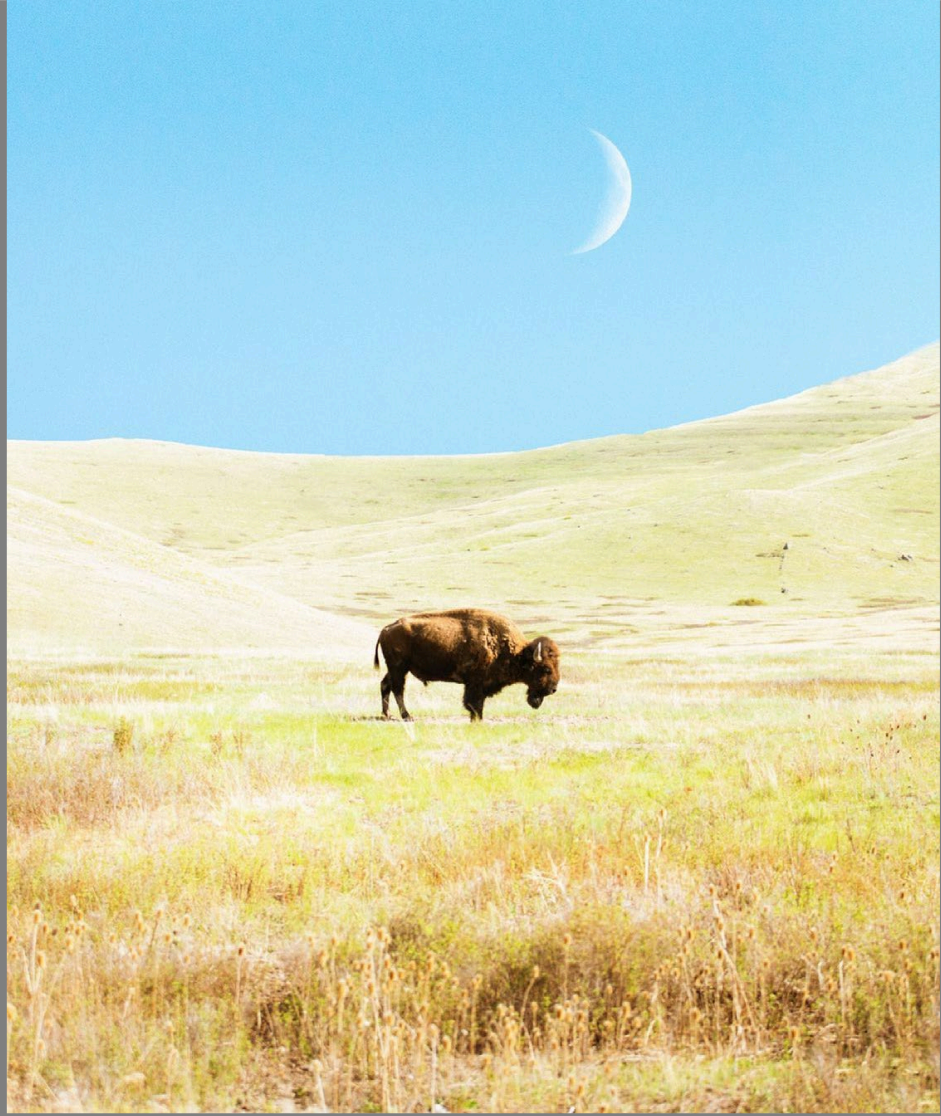
- **CERS AUTOMATICALLY RECOGNIZES THE CANDIDATE AS THE CONTRIBUTING ENTITY**
- **WHEN ALL INFORMATION HAS BEEN ENTERED, HIT 'SUBMIT'**
- **SAVE AFTER EVERY ENTRY!**

# REVIEW

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





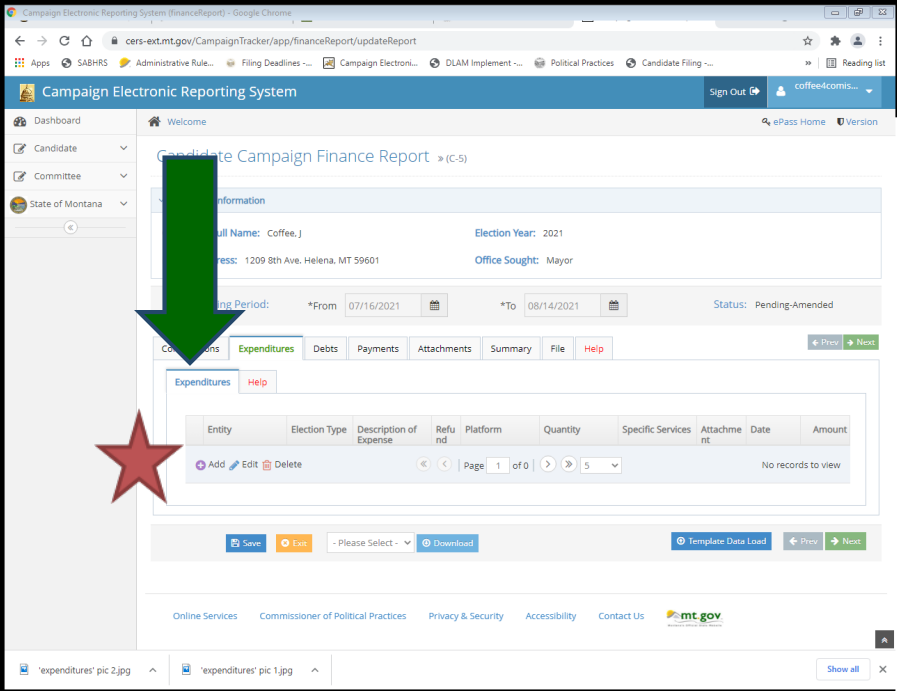


# REPORTING EXPENDITURES

- **EXPENDITURE= A PURCHASE OR PAYMENT MADE BY A CANDIDATE USING CAMPAIGN FUNDS**
  - **EXAMPLES: CAMPAIGN FLIERS; RADIO ADVERTISEMENTS; TELEVISION COMMERCIALS**
- **REPORT EACH EXPENDITURE USING THE “EXPENDITURES” TAB**

# ADDING AN EXPENDITURE

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



The screenshot displays the 'Campaign Electronic Reporting System' interface. The 'Expenditures' subtab is selected, and the 'ADD' button is highlighted with a red star. A green arrow points to the 'ADD' button. The interface includes a sidebar with navigation options, a main content area with a form for adding a new expenditure, and a footer with links to online services and contact information.

**Expenditures** | Help

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

Buttons: Save, Exit, Please Select, Download, Template Data Load, Prev, Next



# ADDING AN EXPENDITURE

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

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

- Report Period:** From Date: 07/16/2021, To Date: 08/14/2021
- Report Detail Entry:**
  - Entity Type: - Please Select -
  - Election Type: - Please Select -
  - Date: Date
  - Last Name/Vendor Name: Individual's Last Name/Vendor's Name
  - First/Middle Initial: First Name, Middle Initial
  - Address: Street Address
  - City/State/Zip: City, - Please Select -, Zip Code
  - Amount: \$ Amount
  - ☐ Is this an over contribution limit refund?
  - Description of Expense: e.g. services provided by a consultant, polling firm, advertising agency, or other person on behalf of a candidate [13-37-229(2)(b)].
  - Platform: e.g. Facebook, KWRZ Radio, Havre Daily print ad, Helena IR digital ad, etc.

The form also includes a 'Show all' button at the bottom right.



# REPORTING EXPENDITURES

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





# REPORTING EXPENDITURES

- **ALL EXPENDITURES MUST BE REPORTED WITH THE FULL NAME AND ADDRESS OF THE VENDOR, THE DATE OF THE EXPENDITURE, THE PURPOSE OF THE EXPENDITURE, AND THE FULL AMOUNT OF THE EXPENDITURE**





# REPORTING EXPENDITURES

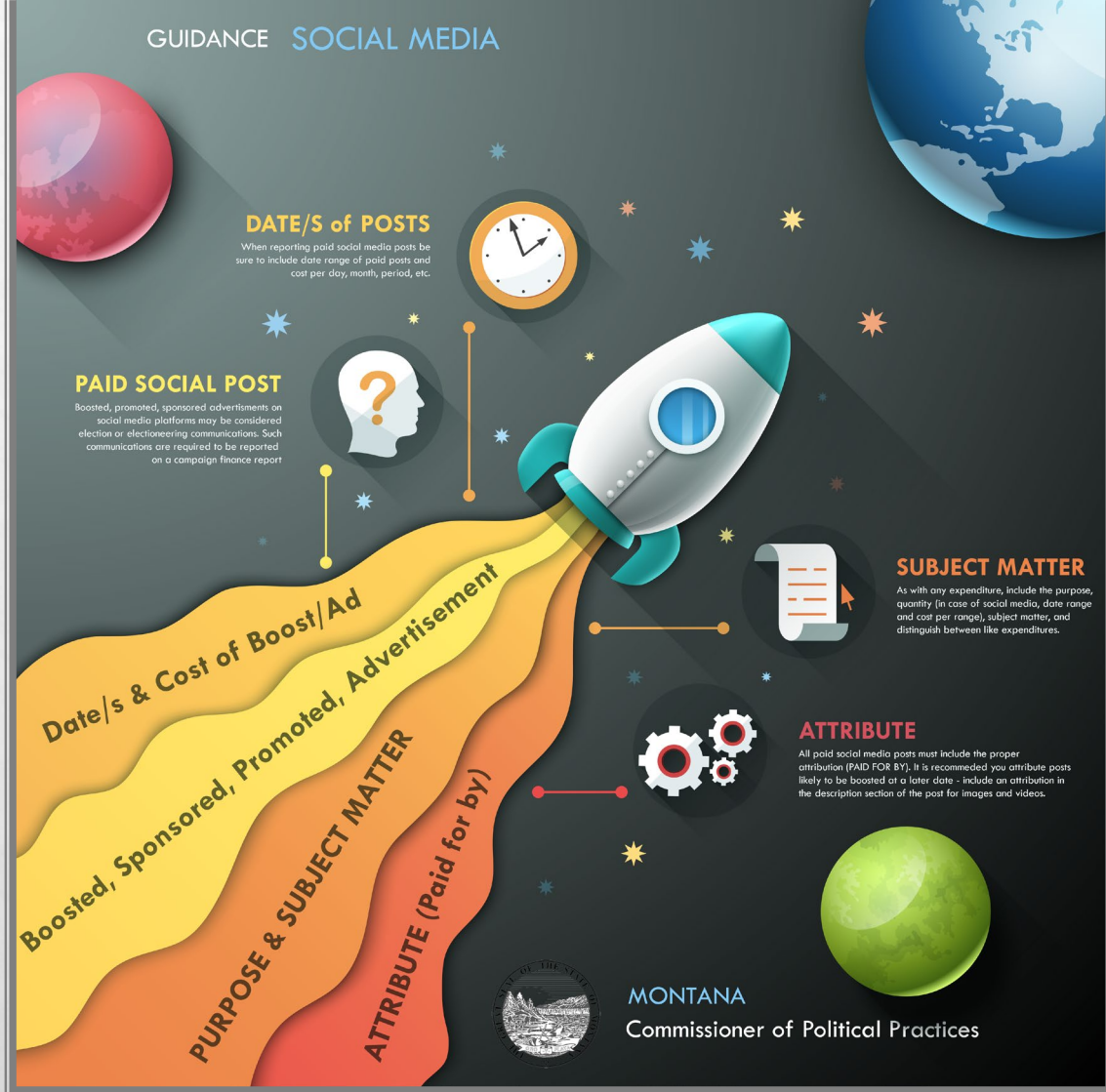
- **“REPORTS OF EXPENDITURES MADE TO A CONSULTANT, ADVERTISING AGENCY, POLLING FIRM, OR OTHER PERSON THAT PERFORMS SERVICES FOR OR ON BEHALF OF A CANDIDATE, POLITICAL COMMITTEE, OR JOINT FUNDRAISING COMMITTEE MUST BE ITEMIZED AND DESCRIBED IN SUFFICIENT DETAIL TO DISCLOSE THE SPECIFIC SERVICES PERFORMED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





# ONLINE CONTRIBUTION PROCESSING FEES

- **FOR CONTRIBUTIONS RECEIVED VIA AN ONLINE PLATFORM (ACTBLUE, WIN RED, PAAYPAL ETC.), REPORT PROCESSING FEE/S CHARGED BY THE PLATFORM AS AN EXPENDITURE OF THE CAMPAIGN**
  - **THE ONLINE DONOR PLATFORM WOULD BE LISTED AS THE ENTITY**
- **ALL PROCESSING FEES PAID DURING THE REPORTING PERIOD CAN BE AGGREGATED AND REPORTED AS ONE EXPENDITURE**



# SOCIAL MEDIA EXPENDITURE REPORTING

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



# ADD AN ATTACHMENT

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

Report Period

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

Report Detail Entry

Entity Type

- Please Select -

Election Type

- Please Select -

Date

Date

Last Name/Vendor Name

Individual's Last Name/Vendor's Name

First/Middle Initial

First Name

Middle Initial

Address

Street Address

City/State/Zip

City

- Please Select -

Zip Code

Amount

\$

Amount

Is this an over contribution limit refund?

Description of Expense

e.g. stamps for mailers, pizza for volunteers, strategic advising (2 hours) on social media plan, etc.

Is this an electioneering communication?

Platform

e.g. Facebook, KWRZ Radio, Havre Daily print ad, Helena IR digital ad, etc.

Quantity

e.g. Ad that ran on DD/MM/YYYY, radio ad that ran DD/MM-DD/MM/YYYY, 200 yard signs, etc.

Subject Matter

e.g. Top 10 reasons to vote for candidate, candidate's education policy, ad outlining opponent's fiscal policy, etc.

Check this box if you have attachments for this transaction

Examples

Paid Communications

1. Newspaper ad in the Helena IR, published xx/xx/xx only. Description of education platform

2. Facebook post, boosted xx/xx/xx-xx/xx/xx, "Outdoor rec is vital to MT's economy"

3. Campaign mailer, 5,000 printed and mailed, candidate biography

# ADD AN ATTACHMENT

TO ADD AN ATTACHMENT, USE THE 'ATTACHMENTS' TAB

Candidate Campaign Finance Report » (C-5)

▼ Candidate Information

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

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

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

Attach Files Help

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

« < | Page 1 of 0 | > » 5 ▼

Save Exit Upload - Please Select - Download

Edit Attach Files

TIP: Upload PDF files to attach to your report.

▼ Report Period

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

▼ Attachment Entry

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

Save Attachment Cancel



# SHARED/COORDINATED EXPENDITURES

- **BEST PRACTICE IS FOR A CAMPAIGN TO INDEPENDENTLY HANDLE ALL CAMPAIGN EXPENSES**
- **COPP *STRONGLY* ENCOURAGES CANDIDATES NOT TO SHARE OR COORDINATE EXPENDITURES WITH OTHER CANDIDATES, AS THEY ARE DIFFICULT TO TRACK AND PROPERLY DISCLOSE**
- **ANY SHARED/COORDINATED EXPENDITURES WOULD BE REPORTED AS BOTH AN EXPENDITURE OF YOUR CAMPAIGN *AND* AN IN-KIND CONTRIBUTION RECEIVED FROM THE OTHER PARTICIPATING CANDIDATE/S**
  - **CONTRIBUTION LIMITS APPLY**

# REPORTING – DEBTS AND PAYMENTS





# ADDING A DEBT

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

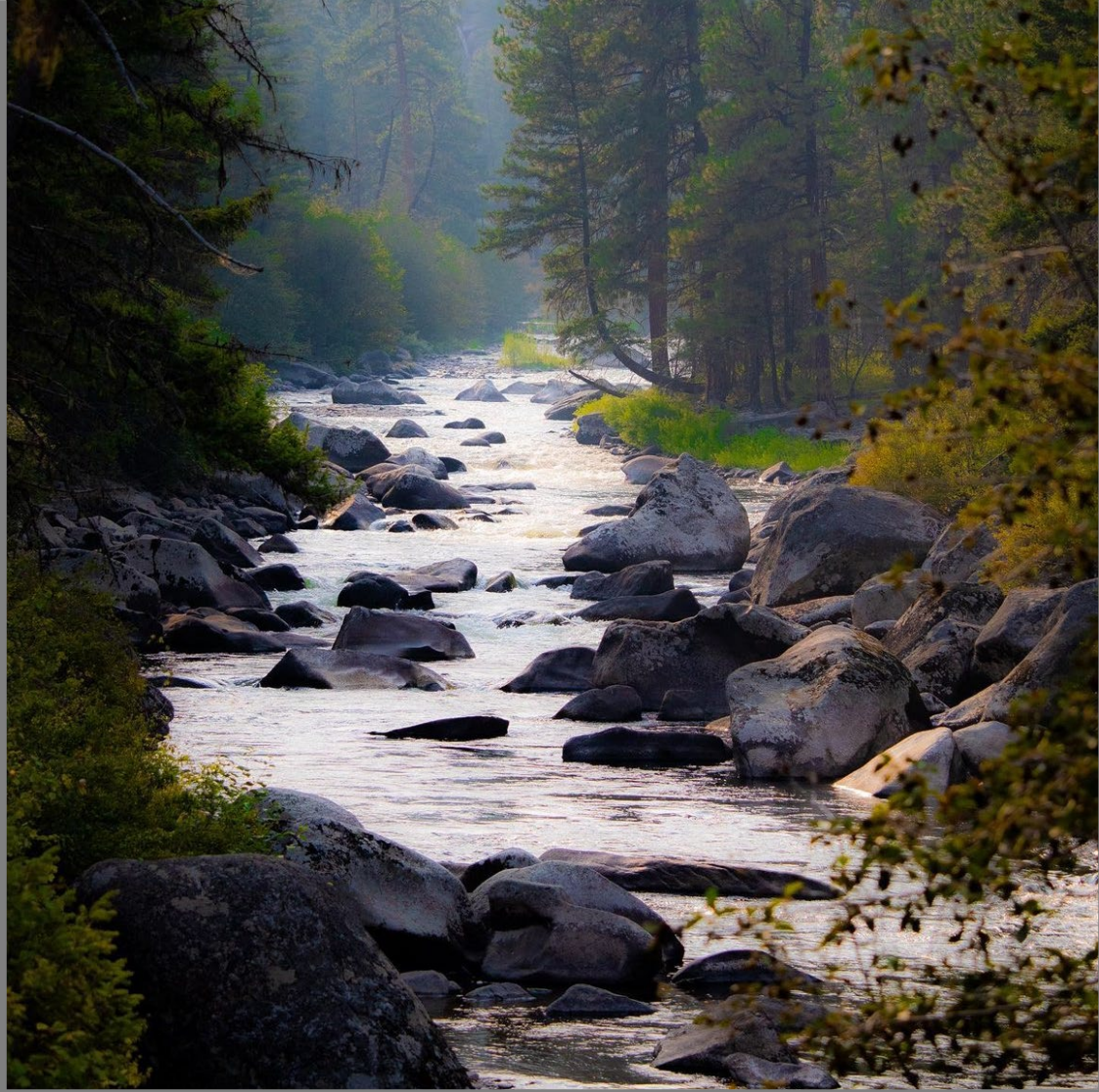
The screenshot displays the 'Campaign Electronic Reporting System' interface. The main heading is 'Candidate Campaign Finance Report > (c-s)'. Below this, there's a section for 'Candidate Information' with fields for 'Candidate Name: Coffee, J.', 'Election Year: 2021', 'Mailing Address: 209 8th Ave, Helena, MT 59601', and 'Office Sought: Mayor'. A green arrow points to the 'Debt/Loan Payments' subtab, which is highlighted with a red star. The 'Debt/Loan Payments' subtab contains a table for 'Add a New Debt' with columns: Entity, Election Type, Purpose of Debt, Platform, Quantity, Specific Services, Date, Type, Debt Amount, and Balance Due. Below the table, there are buttons for 'Add', 'Edit', and 'Delete'. The table is currently empty, showing 'Page 1 of 0' and 'No records to view'. At the bottom, there are buttons for 'Save', 'Exit', 'Download', and 'Template Data Load'.

# ADDING A DEBT

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

The screenshot shows the 'Edit Debts' form in the Campaign Electronic Reporting System (CERS). The browser address bar indicates the URL is `cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport`. The left sidebar shows the 'Campaign Tracker' menu with options for 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The main form area has two tabs: 'Row Details' and 'Entity Search'. A tip states: 'TIP: Use the Entity Search tab to quickly add in and auto-populate details for entities that have already been entered in the CERS system (e.g. for individuals, businesses, and committee entries)'. The 'Report Period' section shows 'From Date: 07/16/2021' and 'To Date: 08/14/2021'. The 'Report Detail Entry' section contains the following fields: 'Entity Type' (dropdown), 'Election Type' (dropdown), 'Date' (calendar icon), 'Last Name/Vendor Name' (text field), 'First/Middle Initial' (text fields for 'First Name' and 'Middle Initial'), 'Address' (text field), 'City/State/Zip' (text field, dropdown, and text field for 'Zip Code'), 'Debt Amount' (text field with a '\$' icon), 'Purpose of Debt' (text area with a placeholder: 'e.g. services provided by a consultant, polling firm, advertising agency, or other person on behalf of a candidate [13-37-229(2)(b)]'), 'Balance Due' (text field), and 'Platform' (text field with a placeholder: 'e.g. Facebook, KWRZ Radio, Havre Daily print ad, Helena IR digital ad, etc.'). The bottom of the screen shows a taskbar with several image files: 'payments' pic.jpg, 'debts' pic.jpg, 'expenditures' pic 2.jpg, and 'expenditures' pic 1.jpg. A 'Show all' button is visible in the bottom right corner.



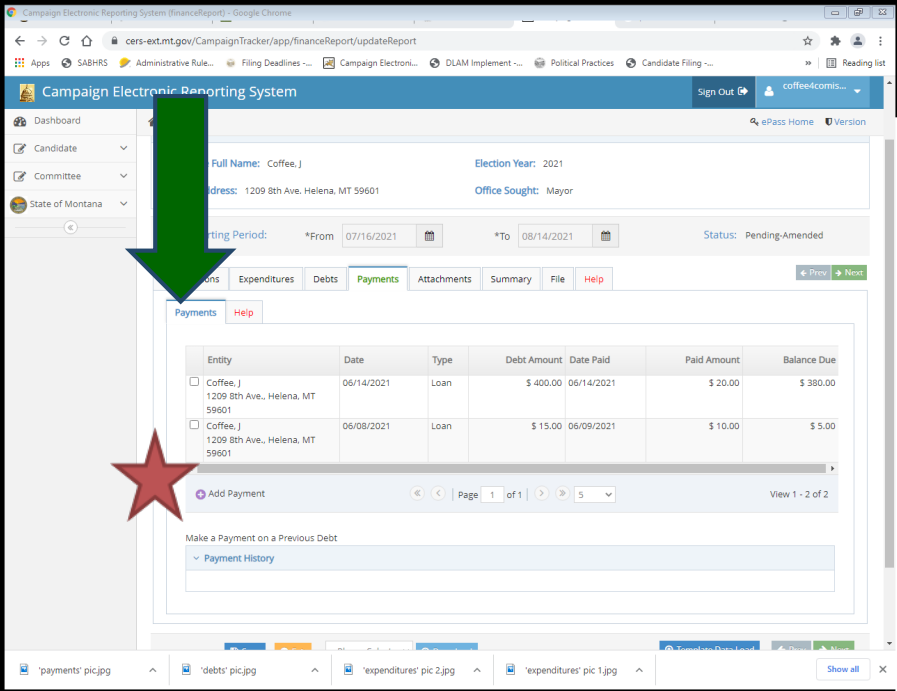


# DEBTS

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

# ADDING A PAYMENT

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



The screenshot shows the Campaign Electronic Reporting System interface. The 'Payments' subtab is selected, and the 'Add Payment' button is highlighted with a red star. A green arrow points to the 'Payments' subtab. The interface displays a table of debts and loans, and a form to add a new payment.

Entity	Date	Type	Debt Amount	Date Paid	Paid Amount	Balance Due
<input type="checkbox"/> Coffee, J 1209 8th Ave., Helena, MT 59601	06/14/2021	Loan	\$ 400.00	06/14/2021	\$ 20.00	\$ 380.00
<input type="checkbox"/> Coffee, J 1209 8th Ave., Helena, MT 59601	06/08/2021	Loan	\$ 15.00	06/09/2021	\$ 10.00	\$ 5.00

Make a Payment on a Previous Debt

Payment History



# ADDING A PAYMENT

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

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

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

At the bottom of the form, there are two buttons: 'Submit' (green) and 'Cancel' (orange). Below the form, a table shows the reporting period and payment details:

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



# PAYMENTS

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



# REVIEW

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



# STEP 3: CERTIFY AND FILE THE REPORT

The screenshot shows the 'Campaign Electronic Reporting System' interface. A green arrow points from the top left towards the 'File' tab in the navigation bar. Another green arrow points from the 'File' tab down to the 'Certify and File' button. A red arrow points from the 'Certify and File' button to the 'View Report' button. The interface includes a sidebar with 'Dashboard', 'Candidate', and 'Committee' options. The main area shows a 'Reporting Period' from 10/15/2021 to 11/15/2021, with a status of 'Pending'. The 'File' tab is active, displaying a 'Certify and File' section with a checkbox for displaying contributor names and addresses. A yellow warning box states 'Only End of Campaign' and provides instructions for closing reports. At the bottom, there are buttons for 'Certify and File', 'View Report', 'Download', and 'Print'.

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



# ADDITIONAL ITEMS AND INFORMATION

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

# ATTRIBUTION



- **ALL PAID CAMPAIGN MATERIALS REQUIRE A 'PAID FOR BY' ATTRIBUTION MESSAGE, [13-35-225, MCA](#).**
  - **INCLUDES ANY PAID SOCIAL MEDIA ACTIVITY!**
- **MUST INCLUDE THE STATEMENT 'PAID FOR BY' WITH THE NAME OF THE CANDIDATE/CANDIDATE'S CAMPAIGN AND ADDRESS**
  - **IF PARTISAN RACE, PARTISAN AFFILIATION MUST ALSO BE INCLUDED**
- **EXAMPLE: PAID FOR BY J COFFEE, PO BOX 1, HELENA, MT 59601. COFFEE PARTY**



# ATTRIBUTION WEBPAGE

## ATTRIBUTION INFORMATION



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

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

Who must comply with attribution requirements?

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

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

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

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

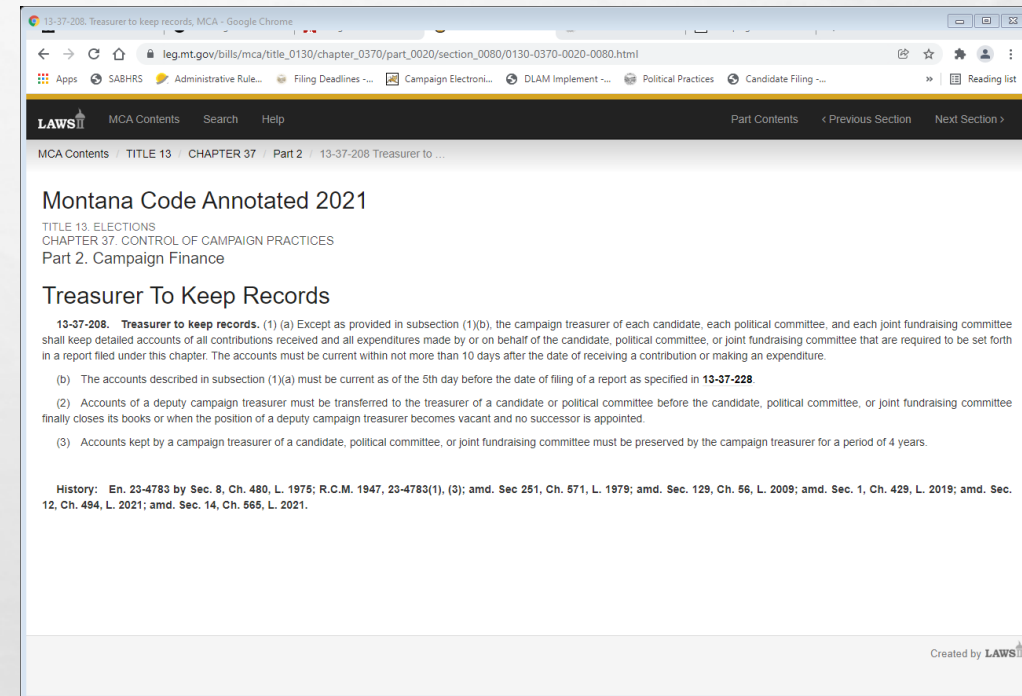
Brochure (web) Brochure (print quality)

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

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

# CAMPAIGN TO KEEP RECORDS

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





# INSPECTION REPORTS & EXAMS

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

CFR Compliance -

Campaign Finance Report DATE: 9/14/2017

Compliance Specialist: Scott Cook

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

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

☒ Inspection

☒ Exam

Section	Item	Explanation / Notes
Individual Contributors	Contributor Ford, Joe E has occupation listed as Consultant	More detail is required as to the occupation of this contributor; please c the specific type of consulting
Individual Contributors	Contributor Martin, Colleen has occupation listed as Fundraiser	More detail is required as to the occupation of this contributor; please c what is meant by Fundraiser
Individual Contributors	Contributor O'Connor, Roy S has occupation listed as Investor	More detail is required as to the occupation of this contributor; please c what is meant by Investor
Individual Contributors	Address missing for contributor Wakimoto, Ronald	Please provide the full mailing address for this contributor, as it is missi report

OTHER:

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 servires provided, was the specific purpose of each expenditure?
Expenditures: Other	Monroe, Callie	We need more detail for this expense- what is included in the 'Event Entertainment' descriptor?
Expenditures: Other	United States Post Office (2 entries)	We need more detail as to what was included in the Postage expenditur 04/12/17 and 05/23/17?

OTHER:

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

Jeffrey A. Mangan  
Montana Commissioner of Political Practices

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

Jeffrey A. Mangan  
Montana Commissioner of Political Practices

CS3 (Scott) Page 1

CS3 (Scott) Page 2

# ORDER OF NONCOMPLIANCE AND FORMAL COMPLAINTS

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

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

## Campaign Finance and Practices

### Complaint Form (08/17)

HAND DELIVERED ☐

SIGNED/NOTARIZED ☐

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

#### Person bringing complaint (Complainant):

Complete Name \_\_\_\_\_

Complete Mailing Address \_\_\_\_\_  
\_\_\_\_\_

Phone Numbers: Work \_\_\_\_\_ Home \_\_\_\_\_

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

Complete Name \_\_\_\_\_

Complete Mailing Address \_\_\_\_\_  
\_\_\_\_\_

Phone Numbers: Work \_\_\_\_\_ Home \_\_\_\_\_

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

#### Verification by oath or affirmation

State of Montana, County of \_\_\_\_\_

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

(SEAL)

\_\_\_\_\_  
Signature of Complainant

Subscribed and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires:



# QUESTIONS? CONTACT US!

- [HTTPS://POLITICALPRACTICES.MT.GOV/](https://politicalpractices.mt.gov/)
- EMAIL: [CPPHELP@MT.GOV](mailto:CPPHELP@MT.GOV) AND [CPPCOMPLIANCE@MT.GOV](mailto:CPPCOMPLIANCE@MT.GOV)
- PHONE: (406) 444-2942
- FACEBOOK/TWITTER: @MONTANACOPP
- ADDITIONAL RESOURCES:
  - [THE CANDIDATE AND TREASURER GUIDE TO NAVIGATING CERS](#)
  - [ACCOUNTING AND REPORTING MANUAL FOR CANDIDATES AND CAMPAIGN TREASURERS \(GREEN BOOK\)](#)
  - GENERAL REPORTING AND DISCLOSURE [TIPS](#)
- PHOTO CREDIT:
  - SCOTT COOK (SLIDES 8, 26, 27, 30, AND 44)
  - VISIT MONTANA ([VISITMT.COM](http://VISITMT.COM) AND [FACEBOOK.COM/VISITMONTANA](https://FACEBOOK.COM/VISITMONTANA)) FOR ALL OTHERS