CAMPAIGN FINANCE REPORTING

MONTANA COMMISSIONER OF POLITICAL PRACTICES CPPHELP@MT.GOV / @MONTANACOPP

ACCESSING CERS

- CANDIDATES ARE REQUIRED TO FILE ALL STATEMENTS AND REPORTS ELECTRONICALLY, USING THE CAMPAIGN ELECTRONIC REPORTING SYSTEM (CERS)
- ACCESS CERS FROM THE COPP'S WEBSITE, https://politicalpractices.mt.gov/
 - FROM THE COPP'S HOMEPAGE, CLICK THE 'ACCESS CERS' ICON



FILE THE STATEMENT OF CANDIDATE WITHIN 5 DAYS!

- CANDIDATES MUST FILE A STATEMENT OF CANDIDATE WITH THE COPP WITHIN 5 DAYS OF BECOMING A CANDIDATE, <u>13-37-201(2)(A)</u>, MCA
 - AN INDIVIDUAL BECOMES A CANDIDATE WHEN THEY RECEIVE OR SOLICIT A CAMPAIGN CONTRIBUTION, MAKE A CAMPAIGN EXPENDITURE, OR FILE AS A CANDIDATE WITH THE ELECTION ADMINISTRATOR, WHICHEVER COMES FIRST
- THE STATEMENT OF CANDIDATE MUST BE FILED ELECTRONICALLY, USING CERS

FILE THE STATEMENT OF CANDIDATE WITHIN 5 DAYS!

- CANDIDATES IN A FIRST-CLASS DISTRICT LOCATED IN A COUNTY HAVING A POPULATION OF LESS THAN 15,000, A SECOND- OR THIRD-CLASS DISTRICT, OR A COUNTY HIGH SCHOOL DISTRICT HAVING A STUDENT ENROLLMENT OF LESS THAN 2,000 ARE EXEMPT FROM FILING THE STATEMENT OF CANDIDATE, <u>13-37-206</u>, MCA
- FULL LIST OF DISTRICTS WHOSE CANDIDATES WOULD BE REQUIRED TO FILE WITH THE COPP IS AVAILABLE ON THE OFFICE OF PUBLIC INSTRUCTION'S WEBSITE <u>HERE</u>

	D Firs	ISTRICTS REQUIRE t Class Districts in Counti Montana Commissie <u>MT Co</u>	D TO REPORT CAMP es with Populations of 15,00 oner of Political Practices (N ommissioner of Political Practi	AIGN FINANCE ACTIVITY 00 or More who Must Report to the ACPP) for FY 2022 Elections ces Webpage
Cas	cad	<u>e</u>		
	1.	Great Falls FI	Lincoln	
	2.	Great Falls HS	Lincolli	
	-		1.	Libby K-12
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	1.	Kalispell EL		
	2.	Flathead HS	1.	Missoula EL
	З.	Columbia Falls EL	2.	Missoula HS
	4.	Columbia Falls HS	3.	Heligate EL
	5.	Somers EL	4.	Frenchicown K-12
	6.	Whitefish EL	Park	
	7.	Whitefish HS	1	Livingston Fl
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	1.	Belgrade EL	Ravalli	
	2.	Belgrade HS	1.	Corvallis K-12
	3.	Bozeman EL	2.	Stevensville EL
	4.	Bozeman HS	3.	Stevensville HS
Hill			4.	Hamilton K-12
	1	Havre FI	Silver	2014
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			1.	Butte EL
Lak	e		2.	Butte HS
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	3.	Ronan EL	1.	Billings EL
	4.	Ronan HS	2.	Billings HS
Lov	vic :	and Clark	3.	Laurel HC
Lev	*13 0	ing clark	4. E	Lockwood K-12
	1.	Helena EL	5.	LUCKWOOU N-12
	2.	Helena HS		
	2	East Holona K-12		

STATEMENT OF CANDIDATE- ACCESSING CERS

1. ACCESS MY ACCOUNTS

Campaign Electronic Report	ting System (dashboard) - Google	Chrome		<u> </u>				
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🕜 Candidate	 properly. 			ng pagear and and an and you minimum manned a		ene process co		
🕜 Committee	TIP: CERS will perform be avoided when up	irm best in Google Chrome, F sing CERS,	irefox, or Edge brow	sers. Safari is preferred for Mac users. Internet Explo	orer does not fu	nction as highl	ly and should	
State of Montana	~							
(c)	 Candidate and co 	mmittee Activity for Election	fear 2022					
	* ACUV	ns	^	Monthly statistics		€ Prev 1	vext 🤿 🔺	
		_	Total		Nov 2021	Dec 2021	 Change 	
	Active C	trations	172	New Candidate Registrations		7	22 🕹	
	Active O	strations	557	Updated Candidate Registrations	81	20	61 🕹	
	Total Ac	ons	729	New Committee Registrations	17	10	7♥	
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	Excepditure	Plazco Colort		June Primary / Now	ember Genera	al		
	Search	· FIERDE DEREU -	*	School and Special Election Reporting	Dates are avai	ilable on the C	OPP	
				website politicalpri	scuces.mt.gov			_

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2. LOGIN USING EPASS



3. ADD NEW REGISTRATION

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		Displ	ay 5 Y reco	rris	Statue \$	63	Address	Campaign	Search:	County \$
			Coffee.1	21	In Process	No	1209 8th Ave., Helena, MT 59601	City	Mayor	Lewis & Clark
			Coffee, J.	50	In Process	Yes	PO Box 1234, Helena, MT 59601	County	County Commissioner	Lewis & Clark
			Coffee, J.	18	Amended	No	PO Box 1234, Helena, MT 59601	County	County Commissioner	Lewis & Clark
		Show	ving 1 to 3	New Registration	View R	egistrat	ion 🛛 🖋 Amend Registration 🔹 File	o/View C-3 19 Rina	د د nce Reports	1 3
			Online Services	Commissioner o	f Political Prac	tices	Privacy & Security Accessibility	Contact Us 🛛 📩	nt.gov.	

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STATEMENT OF CANDIDATE-REQUIREMENTS

THE STATEMENT OF CANDIDATE MUST INCLUDE:

- THE FULL NAME, COMPLETE MAILING ADDRESS, EMAIL ADDRESS, AND OFFICE SOUGHT FOR THE CANDIDATE;
- THE FULL NAME, COMPLETE MAILING ADDRESS, AND EMAIL ADDRESS FOR THE CAMPAIGN TREASURER (CANDIDATE CAN SERVE AS OWN TREASURER); AND
- THE NAME AND ADDRESS FOR THE CAMPAIGN DEPOSITORY (BANK)



STATEMENT OF CANDIDATE- REPORTING STATUS

- **'B' BOX: COMBINED CONTRIBUTIONS/EXPENDITURES UNDER \$500**
- **'B' BOX CANDIDATES NOT REQUIRED TO FILE FINANCE REPORTS**

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• MUST BEGIN FILING FINANCE REPORTS IF CONTRIBUTION/EXPENDITURE ACTIVITY HITS \$500

- 'C' BOX: COMBINED CONTRIBUTIONS/EXPENDITURES MEET OR EXCEED \$500
- 'C' BOX CANDIDATES ARE REQUIRED TO FILE FINANCE REPORTS DISCLOSING CONTRIBUTIONS RECEIVED AND EXPENDITURES MADE

andidate	s Committees 🔍 Access	ID T Sear	rch			
Candida	ite List					
Display	5 records					
	Candidate Name 🗘	Year 🗘	Status 🗘	C-3	Address	Campaign
	Knope (test account), Leslie E	2020	In Process	No	123 Test Drive way, Townsville, MT 12345	State District
Showing	g 1 to 1 of 1 entries					

Candidate Informatio	'n		
Candidate Full Name:	Knope (test account), Leslie E		
Mailing Address: //T 12345	123 Test Drive way Townsville,	Physical Address:	123 TEST Ave Helena, MT 59601
Home Phone:	(406) 444-2942	Alternate Phone:	
Campaign Email Address:	leslie4mt@gmail.com		
Election Year:	2020	Candidate Type:	State District
Office Sought:	House District No. 59	Resident County:	Carter
Political Party:	Natural Law	Current Status:	In Process
Date Filed:	01/24/2020	Amended Date:	
D1 Received Date:		C118 Received Date:	
Reporting Status:			
Bank Full Name:	Bank Name	Bank Address:	123 Test Drive way Townsville,

UPDATE THE STATEMENT OF CANDIDATE WITHIN 5 DAYS OF CHANGE

TREASURER REVISION, EMAIL OR PHONE NUMBER CHANGE, CHANGE IN REPORTING STATUS, ETC.



QUESTIONS FROM PARTICIPANTS

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REPORTING DATES

- SCHOOL CANDIDATES WHOSE COMBINED CONTRIBUTIONS/EXPENDITURES EXCEED \$500 MUST FILE C-5 CAMPAIGN FINANCE REPORTS WITH THE COPP
- FOR THE MAY 3, 2022 SCHOOL ELECTION: C-5 CAMPAIGN FINANCE REPORTS DUE MARCH 4, MARCH 29, APRIL 21, AND MAY 23
- FULL REPORTING CALENDAR AVAILABLE ON THE COPP'S WEBSITE HERE



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

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 <u>may not contribute</u> 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 (9th 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 PublicService 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

CAMPAIGN CONTRIBUTION LIMITS APPLY- CANNOT ACCEPT CONTRIBUTIONS BEYOND LIMIT FROM A CONTRIBUTOR

IN-KIND CONTRIBUTIONS COUNT TOWARDS THE CONTRIBUTION LIMITS!

<u>HTTP://POLITICALPRACTICES.MT.GOV/CONTRIBUTIONLIMITS</u>

MONTANA COMMISSIONER OF POLITICAL PRACTICES | Updated October 1, 2021

CAMPAIGN ACCOUNT

- CANDIDATES "SHALL DESIGNATE ONE PRIMARY CAMPAIGN DEPOSITORY FOR THE PURPOSE OF DEPOSITING ALL CONTRIBUTIONS RECEIVED AND DISBURSING ALL EXPENDITURES MADE", <u>13-37-205(1)</u>, MCA
- 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





QUESTIONS FROM PARTICIPANTS

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FILING A C-5 CAMPAIGN FINANCE REPORT

STEP 1

ACCESS THE REPORT

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		09/16/2021	10/14/2021	Candidate Campaign Finance Report	C5	Filed	Periodic				
		08/15/2021	09/15/2021	Candidate Campaign Finance Report	C5	Amended	Periodic				
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STEP 2

REPORT CONTRIBUTIONS RECEIVED, EXPENDITURES MADE, DEBTS OWED, AND

PAYMENTS

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Committee	~											
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		Candidate Full	Name: Coffe	e.J			Election Year:	2021				
		Mailing Addres	s: 1209 Bth A	ve. Helena, MT	9601		Office Sought:	Mayor				
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STEP 3

CERTIFY AND FILE THE REPORT

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State of Montana 🔍	~ Candidate Information
	Candidate Full Name: Corthe. J Election Year: 2021 Mailing Address: 1209 Bhilves Helms, MT 50001 Office Sought: Mayor
	Reporting Period: *Prom 10/15/2021
	Contributions Especificures Dates Payments Attachments Summary Tile Help
	Check this box to display the name and address of contributors Receive and File Date 12/14/2021
	Only End of Campaign
	A closing report thould be filed only when all a debta and obligations are stelled and not influent "financial activity will occur in the candidates campaign (MCA 13-37- 22/013)-
	Check this box ONLY if this is the candidate's closing

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STEP 1: ACCESS THE C-5 REPORT



ACCESS THE C-5 REPORT

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🕜 Candidate 🗸 🗸	~ Instru	ictions						
🕼 Committee 🗸 🗸	 To add must ch 	d a new report, click the b neck the box next to the r	outton below that corresp relevant candidate for th	ponds to the report you wish to file (e.g. Add New C e specific report.	5, Add New	C7). If multiple candidat	e accounts ex	ist, you
😸 State of Montana 🛛 🗸	• To upo	date or amend a report, o	check the box next to the	e relevant report, and then click on the Update or An	nend Repo	rt button below.		
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		10/15/2021	11/15/2021	Candidate Campaign Finance Report	C5	Pending	Periodic	
		09/16/2021	10/14/2021	Candidate Campaign Finance Report	C5	Filed	Periodic	
		08/15/2021	09/15/2021	Candidate Campaign Finance Report	C5	Amended	Periodic	
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		- 1						
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NAVIGATE TO THE CANDIDATE REPORT LIST

- SELECT 'ADD NEW C5' TO BEGIN A NEW C-5 CAMPAIGN FINANCE REPORT OR 'UPDATE OR AMEND REPORT' TO UPDATE A PREVIOUSLY CREATED REPORT
- BEST PRACTICE! UPDATE REGULARLY AS YOU RECEIVE CONTRIBUTIONS AND MAKE EXPENDITURES- THE SAVE FUNCTION ALLOWS YOU TO UPDATE THE CURRENT REPORT UNTIL YOU ARE READY TO FILE
 - DATA IS NOT PUBLIC UNTIL A REPORT IS FILED
 - **DO NOT FILE UNTIL AFTER REPORTING PERIOD ENDS**

ACCESS THE C-5 REPORT

- CHECK THE DATE RANGE ON YOUR C-5 REPORT! CAMPAIGN ACTIVITY REPORTED USING A DATE OUTSIDE THIS WINDOW WILL CAUSE ERROR
 - FROM= END OF PREVIOUS REPORT- ADDED AUTOMATICALLY FOR ALL BUT INITIAL REPORT (USE DATE OF FIRST CONTRIBUTION/EXPENDITURE FOR INITIAL REPORT)
 - TO= END DATE FOR REPORT- SHOULD BE 5 DAYS BEFORE REPORTING DAY, <u>13-37-228(2)</u>, MCA



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



REPORTING CONTRIBUTIONS RECEIVED

- SIX TYPES OF CONTRIBUTIONS:
 - INDIVIDUAL
 - COMMITTEE
 - FUNDRAISER
 - REFUNDS, ETC.
 - LOANS
 - CANDIDATE CONTRIBUTIONS
- REPORT ALL CONTRIBUTIONS RECEIVED USING THE 'CONTRIBUTIONS' TAB- EACH CONTRIBUTION TYPE GIVEN SUBTAB



REPORTING CONTRIBUTIONS RECEIVED

MONETARY CONTRIBUTIONS:

CASH/CHECK FOR DEPOSIT

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- **IN-KIND CONTRIBUTIONS:**
 - ITEMS OR SERVICES OF VALUE PROVIDED TO THE CAMPAIGN

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- NO CASH/CHECK DEPOSITED IN CAMPAIGN ACCOUNT
- **CAMPAIGN CONTRIBUTION LIMITS APPLY**

ADDING INDIVIDUAL CONTRIBUTIONS

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	Individuals	Committee	Fundraiser	Refunds, Et	tc Loan	Self-Contribu	tion He	lp				
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- 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

- ALL CONTRIBUTIONS OVER \$50 ARE REQUIRED TO BE REPORTED WITH THE CONTRIBUTOR'S FULL NAME, ADDRESS, OCCUPATION, AND EMPLOYER
 - OCCUPATION- BE SPECIFIC!
 - FOR EXAMPLE: 'FINANCIAL CONSULTANT' OR 'IT CONSULTANT' INSTEAD OF CONSULTANT
 - EMPLOYER- INCLUDE THE FULL NAME OF THE BUSINESS/ENTITY THAT EMPLOYS THE CONTRIBUTOR



ADDING INDIVIDUAL CONTRIBUTIONS

- CAMPAIGN MUST KNOW NAME OF ALL CONTRIBUTORS-ANONYMOUS CONTRIBUTIONS PROHIBITED, <u>13-37-217</u>, MCA
- FOR CONTRIBUTIONS RECEIVED VIA AN ONLINE PLATFORM (ACTBLUE, WIN RED, PAYPAL, ETC.), REPORT THE ENLI 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

Campaign Electronic Reporting S	System (financeReport) - Google Chrome	
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· · · · · · · · · · · · · · · · · · ·	Candidate Full Na Election Year: 2021	
	Mailing Address: e. Helena, MT 59601 Office Sought: Mayor	
	Reporting F *From 07/16/2021 *To 08/14/2021 # Status: Pending An	mended
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- 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

- COMMITTEE TYPES: BALLOT ISSUE, INCIDENTAL, INDEPENDENT (PAC), POLITICAL PARTY
- CONTRIBUTIONS RECEIVED FROM ANOTHER CANDIDATE'S CAMPAIGN DO NOT QUALIFY AS COMMITTEE CONTRIBUTIONS!
 - REPORT USING THE 'INDIVIDUALS' TAB



ADDING FUNDRAISER CONTRIBUTIONS

Campaign Electronic Reporting S	System (financeReport) - Google Chrome
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🔛 Apps 🚱 SABHRS 🎐 Ar	dministrative Rule 💀 Filing Deadlines 😹 Campaign Electroni 🤡 DLAM Implement 🍿 Political Practices 🔇 Candidate Filing » 📗 Reading list
🛓 Campaign Elect	tronic Reporting System
Dashboard	☆ Welcome Q _t ePass Home ♥ Version
🕝 Candidate 🗸 🗸	Candidate Campai re Fina nce Report »(-5)
🕼 Committee 🗸 🗸	
😸 State of Montana 🛛 🗸	Candidate Information
	Candidate Full Name: Coffee Election Year: 2021
	Mailing Address: 1209 8th Av 59601 Office Sought: Mayor
	Reporting Period: 17/16/2021
	Contributions Expenditures Payments Attachments Summary File Help
	Individuals Committee Fundralser Refunds. Etc Loan Self-Contribution Help
	Fundraiser Name / Election Type Date Attendees Tickets Cash/Check In-Kind Value In-Kind Description Total to Date Attendees Sold
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	Online Services Commissioner of Political Practices Privacy & Security Accessibility Contact Us
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- 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

- CAN REPORT ALL <\$50 CONTRIBUTIONS RECEIVED AT A SINGLE MASS COLLECTION EVENT (PASS THE HAT, CAMPAIGN RAFFLE, SILENT AUCTION, ETC.) USING THE 'FUNDRAISER' TAB
- REPORT ALL >\$50 DONATIONS, INCLUDING THOSE FROM MASS COLLECTION EVENTS, USING THE 'INDIVIDUALS' TAB
- REPORT EACH INDIVIDUAL MASS COLLECTION EVENT SEPARATELY
- CAMPAIGN MUST KNOW NAME OF ANY CONTRIBUTOR- ANONYMOUS CONTRIBUTIONS NOT ALLOWED, <u>13-37-217</u>, MCA



REFUNDS, ETC.



- 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 "REFUNDS, ETC." TAB IS WHERE REFUNDS, REBATES, OR OTHER INDIRECT CONTRIBUTIONS RECEIVED BY THE CAMPAIGN ARE REPORTED. 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 FROM A VENDOR FOR SERVICES THE CAMPAIGN HAS PREVIOUSLY REPORTED PAYING FOR (SERVICE NOT PROVIDED)



ADDING A LOAN

Campaign Electronic Reporting	g System (financeReport) - Google Chrome
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🔛 Apps 😵 SABHRS 🎐	Administrative Rule 😸 Filing Deadlines 🔣 Campaign Electroni 🥸 DLAM Implement 🎯 Political Practices 📀 Candidate Filing » 🛛 🔢 Reading list
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🕼 Committee 🗸 🗸	
😸 State of Montana 🛛 🗸	~ Candidate Information
(®	Candidate Full Name: Coffee. J Election Year: 2021
	Mailing Address: 1209 8th Ave. Helena, MT 59601 Diffice Sought: Mayor
	Reporting Period: *From 07/16/2021 08/14/2021
	Contributions Expenditures Debts Payments Attained's Summary File Help
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LOAN= CONTRIBUTION THE CAMPAIGN IS OBLIGATED TO PAY BACK

 CONTRIBUTION LIMITS APPLY TO ALL CAMPAIGN LOANS!

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• UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'LOANS' SUBTAB

CLICK 'ADD' TO ADD A NEW LOAN

ADDING A LOAN



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IF CANDIDATE LOAN, SIMPLY CLICK THE 'CLICK HERE TO ADD CANDIDATE LOAN' ICON!

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ADDING A CANDIDATE CONTRIBUTION

Campaign Electronic Reporting Sy	rstem (financeReport) - Google Chrome
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🕼 Candidate 🗸 🗸	Candidate Campaign Finance Report »(C-5)
🕼 Committee 🗸 🗸	
😸 State of Montana 🛛 🗸	✓ Candidate Information
	Candidate Full Name: Coffee. J Electronic D21
	Mailing Address: 1209 8th Ave. Helena, MT 59601 Office Mayor
	Reporting Period: *From 07/16/2021
	Contributions Expenditures Debts Payments Attachments Su File Help
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- CANDIDATE CONTRIBUTION = CONTRIBUTION MADE BY THE CANDIDATE TO OWN CAMPAIGN
 - CANDIDATE NOT LIMITED IN HOW MUCH THEY CAN CONTRIBUTE TO OWN CAMPAIGN
- UNDER CONTRIBUTIONS TAB, NAVIGATE TO THE 'SELF-CONTRIBUTION' SUBTAB
- CLICK 'ADD' TO ADD A NEW CANDIDATE CONTRIBUTION

CANDIDATE CONTRIBUTION VS. CANDIDATE LOAN

- CANDIDATE CONTRIBUTION: CANDIDATE DOES NOT INTEND TO PAY SELF BACK USING CAMPAIGN FUNDS
 - REPORT USING THE 'SELF-CONTRIBUTION' SUBTAB
 - CAMPAIGN CANNOT REIMBURSE OR OTHERWISE PAY BACK SELF-CONTRIBUTIONS AT ANY TIME

- CANDIDATE LOAN: CANDIDATE INTENDS TO PAY SELF BACK USING CAMPAIGN FUNDS
 - REPORT USING 'LOANS' SUBTAB
 - CAMPAIGN CAN REIMBURSE OR OTHERWISE PAY BACK USING CAMPAIGN FUNDS AT ANY TIME
 - LOAN NEED NOT BE PAID BACK IN FULL-CANDIDATE CAN FORGIVE AN OUTSTANDING BALANCE



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

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REPORTING EXPENDITURES

- AN EXPENDITURE IS ANY PURCHASE OR PAYMENT MADE BY A CANDIDATE USING CAMPAIGN FUNDS
 - EXAMPLE EXPENDITURES: 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





REPORTING EXPENDITURES

- FOR CONTRIBUTIONS RECEIVED VIA AN ONLINE PLATFORM (ACTBLUE, WIN RED, PAYPAL 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



REPORTING EXPENDITURES

- EXPENDITURES MUST BE REPORTED 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, DATE OF THE EXPENDITURE, PURPOSE OF THE EXPENDITURE, AND 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



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SOCIAL MEDIA EXPENDITURE REPORTING

• AS WITH ANY OTHER EXPENDITURE, REPORT ALL <u>PAID</u> SOCIAL MEDIA ACTIVITIES

 IF CONTRACTED OUT OR PART OF AN AD AGENCY SERVICE, MUST BE ITEMIZED



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	ndidate Full Name: Coffee, J.		Election Year: 2020				
Reporting Period: +Yoon Bit Attach Files Image: Attach Files	iling Address: PO Box 1234 Helena, MT 5960	1	Office Sought: County	Commissioner			
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SUBMIT AN ATTACHMENT. PROCESS

BEST PRACTICE!

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ADD YOUR RECEIPT, STATEMENT, OR INVOICE AS AN ATTACHMENT

 Report Period 					
From Date: 03/16/2020	0		To Date: 0)4/15/2020	D.
✓ Report Detail Entry					
Entity Type	- Please Select -		~		
Election Type	- Please Select -		~		
Date	Date				
Last Name/Vendor Name	Individual's Last Nan	ne/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 cor	ntribution I	imit refund?		
Description of Expense	e.g. stamps for mail	lers, pizza f	or volunteers, strate	gic advisir	ng (2 hours) on
	social media plan, e	etc.	an instian?		
		eering com	imunication?		
Platform	e.g. Facebook, KWRZ	Radio, Ha	vre Daily print ad, He	lena IR di	gital ad, etc.
Quantity	o a Ad that rap on D		/V radio ad that rao		0.000 200
Quantity	yard signs, etc.	D/WIWI/TT	ri, radio ad tilat fair	<i>DU/WIWI-D</i>	D/WIWI-1111, 200
Subject Matter	e.g. Top 10 reasons t	o vote for	candidate, candidate	's educati	on policy, ad
	outlining opponent's	fiscal polic	cy, etc.		
	Check this box if yo	ou have att	achments for this tra	ansaction	
Examples Paid Com	munications				
1. Newspa	per ad in the Helena IR,	published x	x/xx/xx only, Descripti	on of educ	tation platform

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
- REPORT AS BOTH AN EXPENDITURE OF YOUR CAMPAIGN AND AN IN-KIND CONTRIBUTION RECEIVED FROM THE OTHER PARTICIPATING CANDIDATE/S
 - CONTRIBUTION LIMITS APPLY!



SHARED/COORDINATED EXPENDITURES

- EXAMPLE 1: CANDIDATE A AND B HOLD A SHARED CAMPAIGN FUNDRAISING EVENT. THEY EVENLY SPLIT THE \$300.00 VENUE RENTAL FEE AND \$150.00 ON PAID ADVERTISEMENTS FOR THE EVENT. TO PROPERLY REPORT THIS ACTIVITY, EACH CANDIDATE MUST:
 - REPORT EXPENDITURES IN THE AMOUNT OF \$150.00 FOR VENUE RENTAL AND \$75.00 FOR EVENT ADVERTISING; <u>AND</u>
 - REPORT RECEIVING IN-KIND CONTRIBUTIONS FROM THE OTHER CANDIDATE IN THE AMOUNT OF \$150.00 FOR VENUE RENTAL AND \$75.00 FOR EVENT ADVERTISING



SHARED/COORDINATED EXPENDITURES

- EXAMPLE 2: TOGETHER AS A GROUP, CANDIDATES A, B, AND C PLAN TO PURCHASE CAMPAIGN FLIERS, AT A TOTAL COST OF \$300.00
 - CANDIDATES A, B, AND C EACH PAY \$100.00
 - FLIERS EXPRESSLY SUPPORT EACH OF CANDIDATES A, B, AND C
- EACH CANDIDATE REPORTS A \$100 EXPENDITURE TO THE VENDOR, AND
- EACH CANDIDATE REPORTS RECEIVING AN IN-KIND CONTRIBUTION OF \$33.33 FROM THE OTHER TWO CANDIDATES (\$100.00 VALUE PER CANDIDATE/3 CANDIDATES = \$33.33)



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

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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

L B





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





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



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

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STEP 3-CERTIFY AND FILE THE REPORT



CERTIFY AND FILE THE REPORT

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	A closing report should be filed only when all debts and obligations are settled and no further financial	
	a comy will occur in the canonales campaign (new 1557-2265)).	
	Check this box ONLY if this is the candidate's closing report.	
	Certification	
	Certify the foregoing report of campaign finances is true, complete use common the best of my knowledge, in accordance with Montana Code Annotated Title 13, Chapter 37.	
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- 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

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• ORDERS OF NONCOMPLIANCE AND FORMAL CAMPAIGN COMPLAINTS

ATTRIBUTION



- ALL PAID CAMPAIGN MATERIALS REQUIRE A 'PAID FOR BY' ATTRIBUTION MESSAGE, <u>13-35-225, MCA</u>.
 - INCLUDES ANY PAID SOCIAL MEDIA ACTIVITY!
- MUST INCLUDE THE STATEMENT 'PAID FOR BY' WITH THE NAME OF THE CANDIDATE/CANDIDATE'S CAMPAIGN AND ADDRESS
- EXAMPLE: PAID FOR BY J COFFEE, PO BOX 1, HELENA, MT 59601

ATTRIBUTION WEBPAGE



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

http://politicalpractices.mt.gov/attribution

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", <u>13-37-208</u>, 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!

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Campaign Finan	ce Report DATE: 9/14/2017	√√ Inspection	OTHER:
		√′ Exam	
Compliance Spe	cialist: Scott Cook		
REFERENCE REP	ORT: 02/14/17-08/28/17		An initial facial inspection of the campaign finance report found deficiencies based on the
An initial compli make all require checked marked cppcompliance@	iance examination has been com d revision of the following items d and noted items. Should you n @mt.gov. Thank you.	pleted for the above referenced report. Please review and that may become campaign finance violations. Correct all eed assistance please call 406.644.3919 or email	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
CONTRIBUTION	S Section / Issues		
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 of the specific type of consulting	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
ndividual 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	court. Jeffrey A. Mangan
ndividual 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	Montana Commissioner of Political Practices
ndividual Contributors	Address missing for contributor Wakimoto, Ronald	Please provide the full mailing address for this contributor, as it is missir report	
DTHER:			
EXPENDITURES	Section / Issues		
Section	Item	Explanation / Notes	
xpenditures: 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, was the specific purpose of each expenditure?	
xpenditures: Other	Monroe, Callie	We need more detail for this expense- what is included in the 'Event Entertainment' descriptor?	
xpenditures: Other	United States Post Office (2 entries)	We need more detail as to what was included in the Postage expenditue 04/12/17 and 05/23/17?	

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ORDER OF NONCOMPLIANCE AND FORMAL COMPLAINTS

- THE COMMISSIONER MAY FILE AN ORDER OF NONCOMPLIANCE COMPELLING COMPLIANCE WITH ALL REPORTING LAWS/RULES
- FAILURE TO TIMELY FILE THE STATEMENT OF CANDIDATE OR CAMPAIGN FINANCE 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

Campaign Fina Complaint Forr	nce and Prac n (08/17)	tices	HAND DELIVERED
- Type or print in ink all in	formation on this for	m except for verification sizes	
Person bringing co	mplaint (Complair	nant):	
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QUESTIONS? CONTACT US!

- HTTPS://POLITICALPRACTICES.MT.GOV/
- EMAIL: <u>CPPHELP@MT.GOV</u> AND <u>CPPCOMPLIANCE@MT.GOV</u>
- **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

L. R.

- PHOTO CREDIT:
 - SCOTT COOK (SLIDES 12, 27, 29, 37, 45, AND 46)

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 VISIT MONTANA (<u>VISITMT.COM</u> AND <u>FACEBOOK.COM/VISITMONTANA</u>) FOR ALL OTHERS