

CAMPAIGN FINANCE REPORTING

MONTANA COMMISSIONER OF POLITICAL PRACTICES

CPPHELP@MT.GOV / @MONTANACOPP



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, [13-37-201\(2\)\(A\)](#), 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

STEP 1: ACCESS CERS

The screenshot shows the Montana.gov website with the following elements:

- Header:** MONTANA.GOV OFFICIAL STATE WEBSITE, SERVICES, AGENCIES, LOGIN, SEARCH MONTANA.GOV
- Section Header:** COMMISSIONER OF POLITICAL PRACTICES, Promoting confidence, transparency, and accountability in Montana's democratic processes.
- Navigation Bar:** ONLINE SERVICES, FORMS, REPORTING CALENDARS, TRAINING SCHEDULE, CONTRIBUTION LIMITS, ABOUT US, Search
- Main Content Area:**
 - Left column: VOTE MONTANA CANDIDATE AND COMMITTEE INFORMATION, CAMPAIGN FINANCE DISCLOSURE
 - Right column: THE LEGISLATIVE SESSION & LOBBYING, ETHICS
 - Text: Welcome to the Commissioner of Political Practices website! Commissioner Chris Gallus. 2024-2025 Candidate Campaign Contribution Limits Summary - AVAILABLE HERE. +see HERE for COPP's proposed amendments to Montana's campaign contribution limits. +see HERE for COPP's Adoption Notice of the amendments to Montana's campaign contribution limits. 2024-2025 Candidate and Committee Search - AVAILABLE HERE
- Annotations:** A large blue arrow points from the 'AVAILABLE HERE' link in the text to the 'ACCESS CERS' button. Another blue arrow points from the 'ACCESS CERS' button to the 'ACCESS THE HARD COPY SEARCH' button.

ACCESSING CERS- STEPS

1. ACCESS MY ACCOUNTS

The screenshot shows the Campaign Electronic Reporting System dashboard. A blue arrow points to the 'Access My Accounts' button in the search bar area. The dashboard includes a sidebar with navigation options like Dashboard, Candidate, Committee, and State of Montana. The main content area displays 'Candidate and committee Activity for Election Year 2022' with various statistics and a search bar.

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

2. LOGIN USING OKTA

The screenshot shows the Montana.gov login page. It features the Montana.gov logo at the top, a 'SIGN IN' button, and a form for entering a 'Username' and 'Password'. A note states: 'State Employees use your state network username, all others use email address'. There is also a 'Remember me' checkbox and a 'Sign In' button. At the bottom, there is a link for 'Don't have an account? Sign up'.

3. ADD NEW REGISTRATION

The screenshot shows the Campaign Electronic Reporting System dashboard after login. The user is logged in, and the dashboard displays a 'Candidate List' table. The table has columns for Candidate Name, Year, Status, C-3, Address, Campaign, Office, and County. There are three entries in the list, all for 'Coffee, J.'. The first entry is selected with a checkmark.

Candidate Name	Year	Status	C-3	Address	Campaign	Office	County
<input checked="" type="checkbox"/> Coffee, J.	2021	In Process	No	1209 5th 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

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)

The screenshot displays the 'Campaign Registration View' for a candidate in the 'Campaign Electronic Reporting System'. The page is titled 'Statement of Candidate (C1 or C1-A)'. The candidate information is as follows:

Candidate Information	
Candidate Full Name:	Coffee, J
Mailing Address:	1209 8th Ave, Helena, MT 59601
Home Phone:	
Campaign Email Address:	cppcompliance@mt.gov
Election Year:	2021
Office Sought:	Mayor
Political Party:	Unknown
Date Filed:	06/04/2021
D1 Received Date:	
Reporting Status:	Will spend more than \$500
Bank Full Name:	First Bank of Coffee
Physical Address:	
Alternate Phone:	
Candidate Type:	City
Resident County:	Lewis & Clark
Current Status:	In Process
Amended Date:	
C118 Received Date:	
Bank Address:	1 Coffee St Helena, MT 59601

Below the candidate information, there are sections for 'Campaign Treasurer Information' and 'Deputy Treasurer Information'. The treasurer information is as follows:

Campaign Treasurer Information	
Treasurer Full Name:	Coffee, Bear
Mailing Address:	1209 8th Ave, Helena, MT 59601
Home Phone:	
Home or Personal Email Address:	cppcompliance@mt.gov
Physical Address:	
Alternate Phone:	

The 'Deputy Treasurer Information' section is currently empty.

STATEMENT OF CANDIDATE- REPORTING STATUS

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

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
Home Phone: (406) 444-2942
Campaign Email Address: leslie4mt@gmail.com
Election Year: 2020
Office Sought: House District No. 59
Political Party: Natural Law
Date Filed: 01/24/2020
D1 Received Date:
Reporting Status:
Bank Full Name: Bank Name

Physical Address: 123 TEST Ave Helena, MT 59601
Alternate Phone:
Candidate Type: State District
Resident County: Carter
Current Status: In Process
Amended Date:
C118 Received Date:
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.

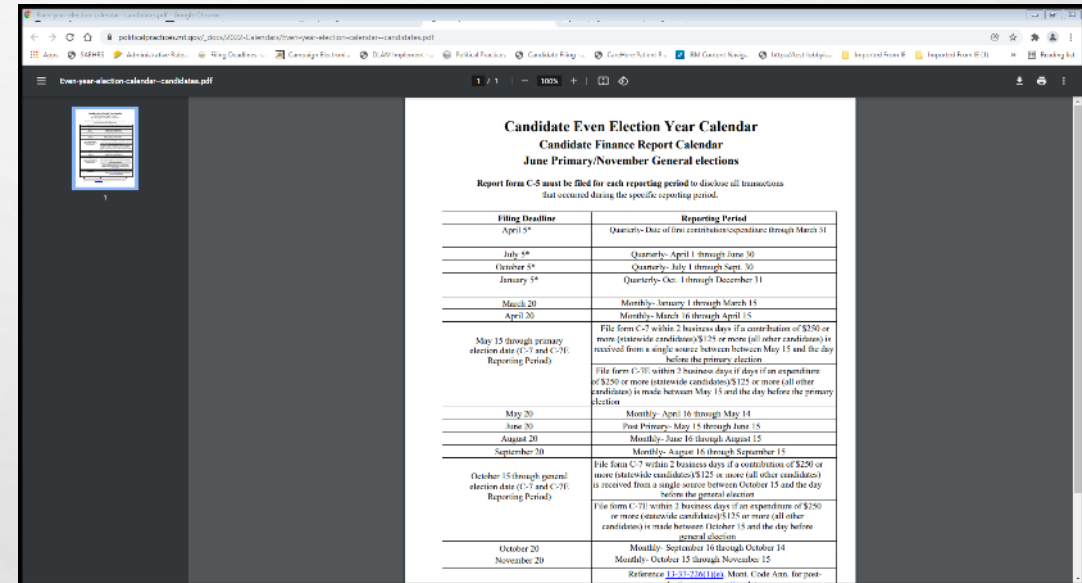


REPORTING DATES

- 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



Filing Deadline	Reporting Period
April 5*	Quarterly- Date of first contribution/expense 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 20 through primary election date (C-7) and C-7E Reporting Period)	File Form C-5 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 days of 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 15
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 general election
October 20	Monthly- September 16 through October 14
November 20	Monthly- October 15 through November 15

Reference: [13-01720111a](#) Minn. Code Ann. for post-

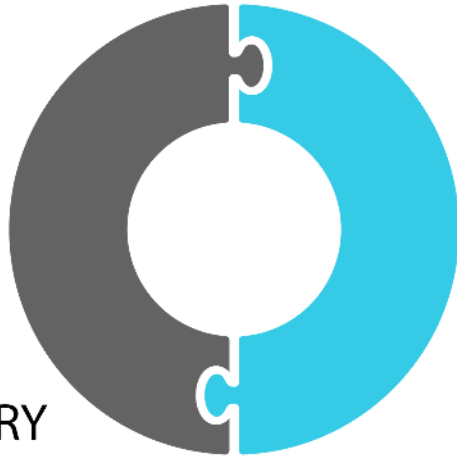
CAMPAIGN CONTRIBUTION LIMITS

- 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 PER ELECTION!

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.



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

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."



Montana Commissioner
of Political Practices

February 2018

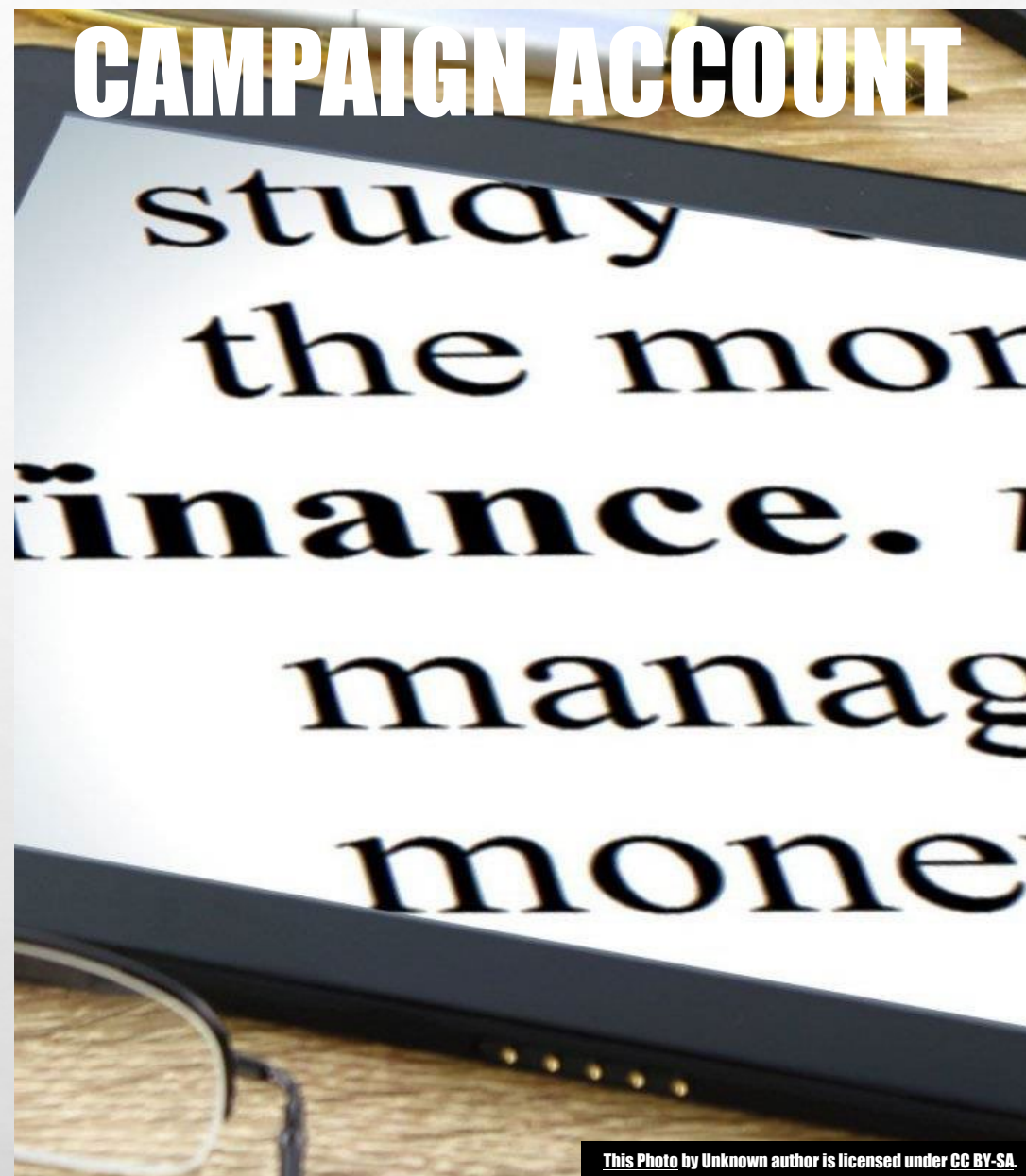
- "ELECTION" MEANS THE GENERAL ELECTION OR A PRIMARY ELECTION THAT INVOLVES TWO OR MORE CANDIDATES FOR THE SAME NOMINATION
 - IF YOU PARTICIPATE IN A CONTESTED PRIMARY, THEN THERE ARE **TWO ELECTIONS** TO WHICH THE CONTRIBUTION LIMITS COULD APPLY- PRIMARY AND GENERAL
 - IF YOU DO NOT PARTICIPATE IN A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

- 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 OF ALL CAMPAIGN TRANSACTIONS



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REPORTING CONTRIBUTIONS- PRIMARY AND GENERAL

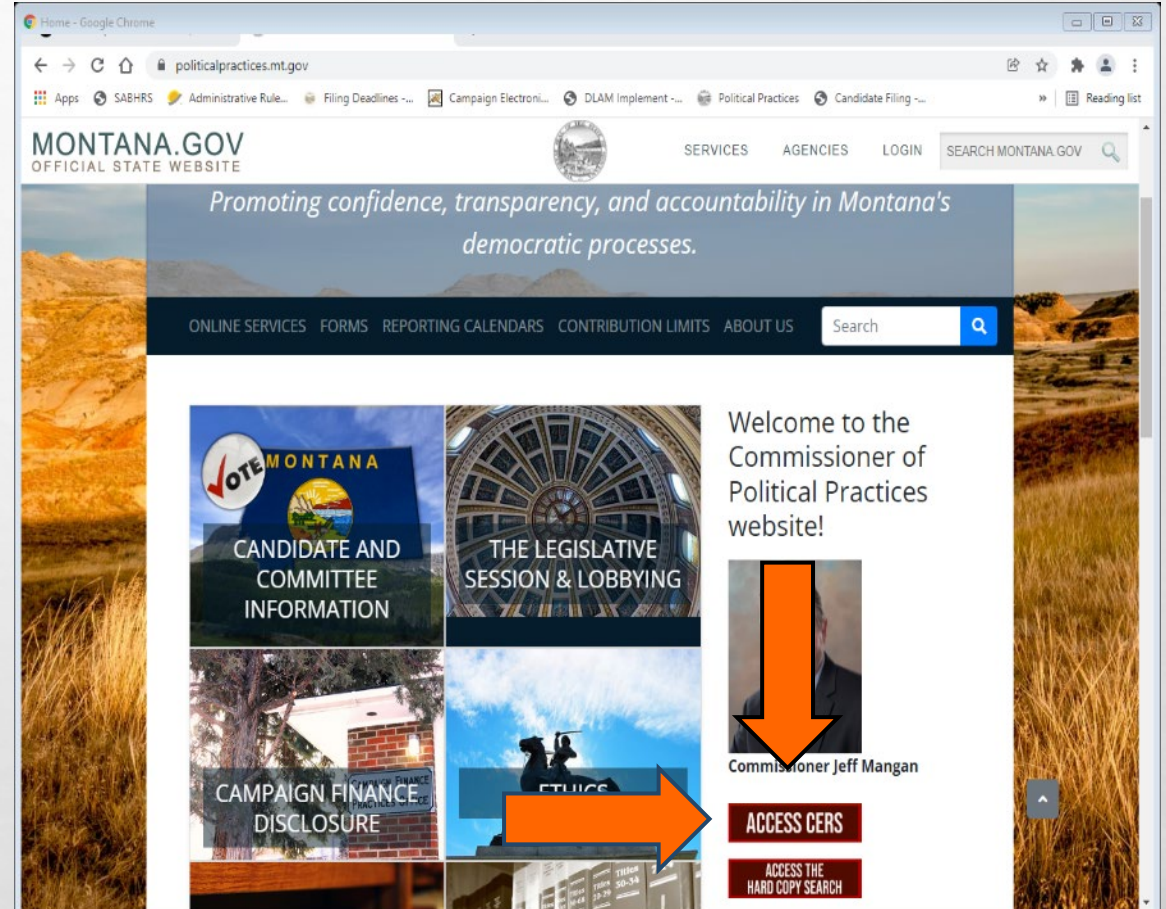
- *LEGISLATIVE CANDIDATES:* IF PARTICIPATING IN A CONTESTED PRIMARY, PRIMARY AND GENERAL ELECTION CONTRIBUTIONS MAY BE DEPOSITED INTO THE SAME ACCOUNT IF:
 - THE CANDIDATE MAINTAINS RECORDS CONCERNING WHETHER CONTRIBUTIONS WERE DESIGNATED FOR THE PRIMARY OR GENERAL ELECTION, AND
 - THE BALANCE IN THE 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

FILE YOUR REPORT ELECTRONICALLY, USING CERS

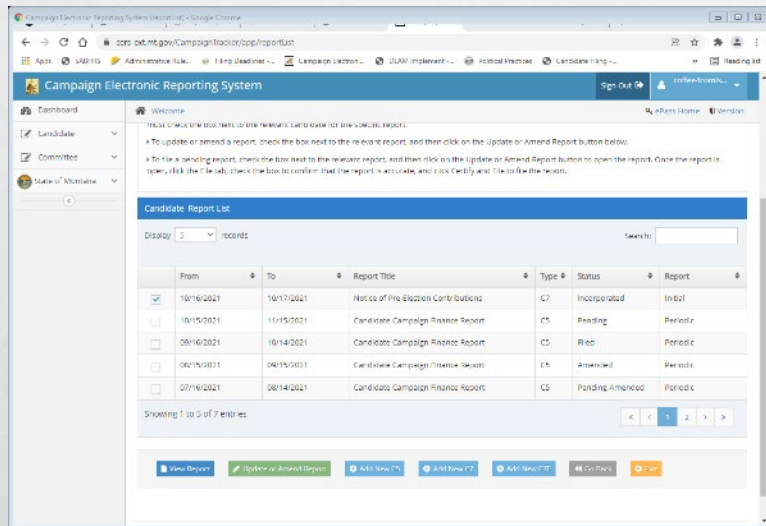
- ALL C-5 CAMPAIGN FINANCE REPORTS MUST BE FILED ELECTRONICALLY, USING THE CAMPAIGN ELECTRONIC REPORTING SYSTEM (CERS)
- ACCESS CERS FROM THE COPP'S WEBSITE, [HTTPS://POLITICALPRACTICES.MT.GOV/](https://politicalpractices.mt.gov/)
 - CLICK THE 'ACCESS CERS' ICON



FILING A C-5 CAMPAIGN FINANCE REPORT

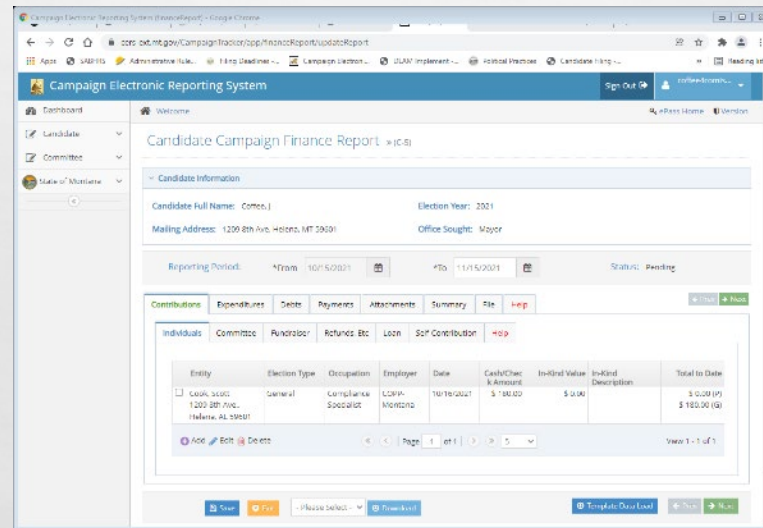
STEP 1

ACCESS THE C-5 REPORT



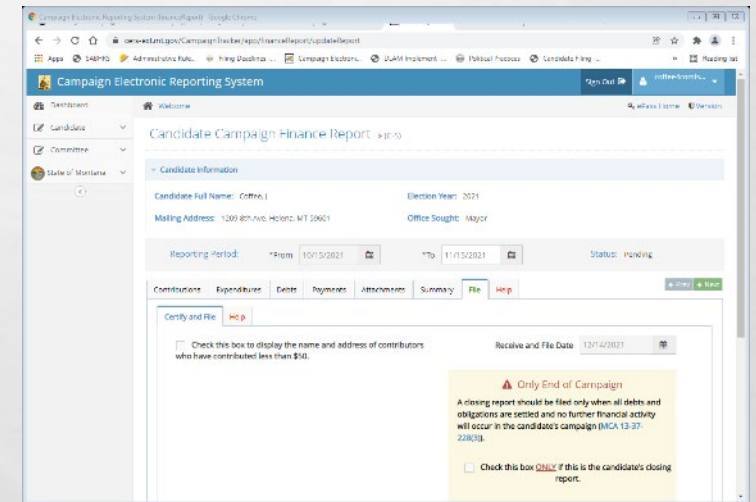
STEP 2

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



STEP 3

CERTIFY AND FILE THE REPORT



STEP 1: ACCESS THE C-5 REPORT

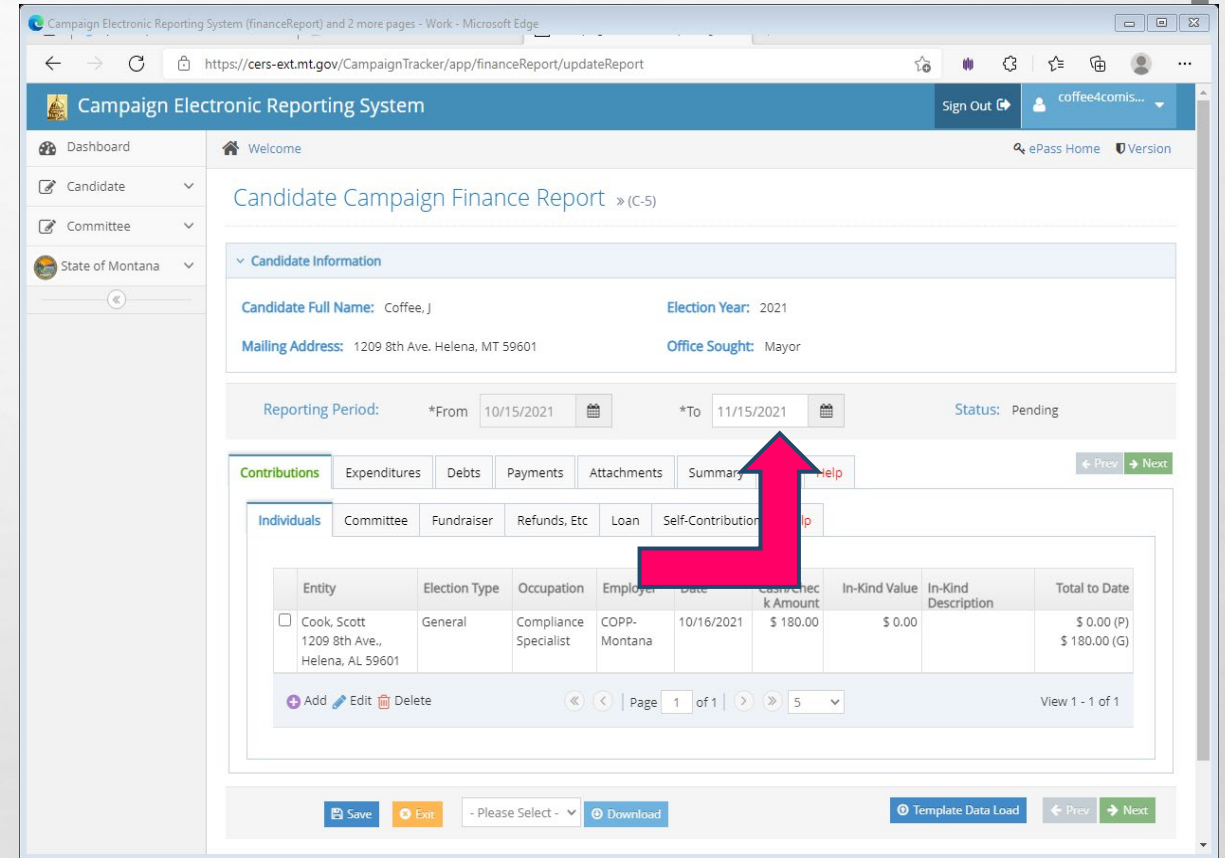
The screenshot shows the Campaign Electronic Reporting System (CERS) interface. The main content area displays the 'Candidate Report List' with a table of reports. The table has columns for 'From', 'To', 'Report Title', 'Type', 'Status', and 'Report'. Below the table, there are buttons for 'View Report', 'Update or Amend Report', 'Add New C5', 'Add New C7', 'Add New C7E', '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

- 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 IF "SAVED" AND "PENDING"
 - A REPORT IS NOT ACTUALLY FILED UNTIL THE CANDIDATE "CERTIFIES AND FILES" THE REPORT

ACCESS THE C-5 REPORT

- CHECK THE REPORTING PERIOD ON YOUR C-5 REPORT! CAMPAIGN ACTIVITY OUTSIDE THIS WINDOW WILL CAUSE AN ERROR CODE TO BE GENERATED
 - **FROM**= BEGINNING DATE FOR THE REPORTING PERIOD (THIS IS AUTOMATICALLY FILLED IN BY THE SYSTEM BASED ON THE END DATE OF YOUR LAST FILED REPORT)
 - **TO**= END DATE FOR THE REPORTING PERIOD
- REPORTING PERIODS FOR EACH REPORT ARE INCLUDED ON THE COPP'S [REPORTING CALENDARS](#) PAGE



The screenshot displays the Campaign Electronic Reporting System (CERS) interface. The main heading is "Candidate Campaign Finance Report (C-5)". The candidate information includes: Candidate Full Name: Coffee, J; Election Year: 2021; Mailing Address: 1209 8th Ave. Helena, MT 59601; Office Sought: Mayor. The reporting period is set from 10/15/2021 to 11/15/2021, with a status of Pending. The interface shows tabs for Contributions, Expenditures, Debts, Payments, Attachments, and Summary. The Summary tab is selected, and a red arrow points to it. Below the tabs, there are sub-tabs for Individuals, Committee, Fundraiser, Refunds, Etc, Loan, and Self-Contribution. A table lists the contributions for Scott Cook, a Compliance Specialist at COPP-Montana, with a cash check amount of \$180.00 on 10/16/2021. The table also shows in-kind values and descriptions. At the bottom, there are buttons for Save, Exit, Download, and Template Data Load.

Entity	Election Type	Occupation	Employer	Date	Cash Check Amount	In-Kind Value	In-Kind Description	Total to Date
<input type="checkbox"/> Cook, Scott 1209 8th Ave., Helena, AL 59601	General	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 'Candidate Campaign Finance Report' for 'Coffee, J.' in 2021. The 'Contributions' tab is active, and the 'Individuals' subtab is selected. A green arrow points to the 'Individuals' subtab, and a red star highlights the 'Add' button in the table below.

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

- 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' form in the Campaign Electronic Reporting System. The form 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)'. 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 (with calendar icon)
 - Last Name: Last Name
 - First/Middle Initial: First Name, Middle Initial
 - Address: Street Address
 - City/State/Zip: City, - Please Select - (State dropdown), Zip Code
 - Employer: Employer
 - Occupation: Contributor's Occupation
 - Cash/Check Amount: \$ Cash/Check Amount
 - In-Kind Value: \$ In-Kind Value
 - In-Kind Description: Description of In-Kind Contribution
 - Total to Date Primary: \$ Total to Date Primary

- 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!**

- **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
 - "BUSINESS OWNERS" MUST INCLUDE ANME OF THE BUSINESS AND/OR TYPE OF OCCUPATION IN ADDITION TO "BUSINESS OWNER"



**ADDING INDIVIDUAL
CONTRIBUTIONS**

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 shows the Campaign Electronic Reporting System (CERS) interface. The main navigation menu on the left includes 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The current page is titled 'Candidate Campaign Finance Report' and displays candidate information for 'Coffee, J.' for the 2021 election year, with the office sought being 'Mayor'. The 'Report' section shows a date range from 07/16/2021 to 08/14/2021. Below this, there are tabs for 'Contributions', 'Expenditures', 'Debts', 'Payments', 'Attachments', 'Summary', 'File', and 'Help'. The 'Contributions' tab is active, and within it, the 'Committee' subtab is selected. A table with columns for 'Entity', 'Committee Type', 'Election Type', 'Date', 'Cash/Check Amount', 'In-Kind Value', 'In-Kind Description', 'Political Party Staff', and 'Total to Date' is shown, but it currently has 'No records to view'. A red star highlights the 'Add' button in the table's header area. At the bottom of the page, there are links for 'Online Services', 'Commissioner of Political Practices', 'Privacy & Security', 'Accessibility', and 'Contact Us', along with the 'mt.gov' logo.

- 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

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Apps SABHRS Administrative Rule... Filing Deadlines... Campaign Electroni... DLAM Implement... Political Practices Candidate Filing... Reading list

Campaign Electronic Reporting System

Dashboard

Candidate

Committee

State of Montana

Edit Committee Contributions

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

Election Type: - Please Select -

Date: Date

Committee Type: - Please Select -

Committee Name: Committee Name

Address: Street Address

City/State/Zip: City - Please Select - Zip Code

Cash/Check Amount: \$ Cash/Check Amount

In-Kind Value: \$ In-Kind Value

In-Kind Description: Description of In-Kind Contribution

Total to Date Primary: \$ Total to Date Primary

Total to Date General: \$ Total to Date General

- 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 'Candidate Campaign Finance Report' interface. The 'Contributions' tab is selected, and the 'Fundraiser' subtab is active. A table with columns for Fundraiser Name / Location, Election Type, Date, Attendees, Tickets Sold, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date is displayed. The 'Add' button is highlighted with a red star. A green arrow points to the 'Fundraiser' subtab.

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 displays the 'Edit Fundraisers' interface in a web browser. The page title is 'Campaign Electronic Reporting System (DynamicsReport)'. The URL is 'cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport'. The browser tabs include 'SABHRS', 'Administrative Rule...', 'Filing Deadlines...', 'Campaign Electroni...', 'DLAM Implement...', 'Political Practices', and 'Candidate Filing...'. The left sidebar shows navigation options: 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The main content area is titled 'Edit Fundraisers' and has a 'Row Details' tab selected. The form is divided into sections: 'Report Period' with 'From Date: 07/16/2021' and 'To Date: 08/14/2021'; 'Report Detail Entry' with fields for 'Election Type' (Please Select), 'Date of Fundraiser' (Date), 'Name of Fundraiser' (e.g. Raffle for candidate Potter, Prairie County Federalist's spaghetti feed, Annual Carbon County Republicans gala, etc.), 'Location (Venue, City)' (Venue, City), 'Number of Attendees' (Number of participants involved), 'Number of Tickets Sold' (If applicable, disclose number of tickets sold), 'Cash/Check Amount' (\$ Cash/Check Amount), 'In-Kind Value' (\$ In-Kind Value), 'In-Kind Description' (Description of In-Kind Contribution), 'Total to Date Primary' (\$ Total to Date Primary), and 'Total to Date General' (\$ Total to Date General). At the bottom, 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.

- 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!

The screenshot displays the Campaign Electronic Reporting System (CERS) interface. The main heading is "Candidate Campaign Finance Report" for candidate "Coffee, J" in 2021. The "Contributions" tab is selected, and the "Refunds, Etc." subtab is active. A table with columns for Entity, Election Type, Transaction Type, Previous Trans, Original Transaction, Original Transaction, Original Transaction, Date, and Cash/Check Amount is shown. The table currently contains no records. A red star highlights the "Add" button in the table header. A green arrow points to the "Refunds, Etc." subtab. The interface includes navigation buttons like "Save", "Exit", "Download", and "Template Data Load".

REFUNDS, ETC.

- 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!

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Edit Refunds, Etc

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: 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?



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

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

The screenshot shows the CERS interface for a candidate's finance report. The candidate is 'Coffee, J' for the 2021 election year, seeking the office of Mayor. The reporting period is from 07/16/2021 to 08/14/2021, and the status is 'Pending-Amended'. The 'Contributions' tab is selected, and the 'Loan' subtab is active. A table with columns for Entity, Election Type, Occupation, Employer, Date, Cash/Check Amount, In-Kind Value, In-Kind Description, and Total to Date is shown. The table currently has no records. A red star highlights the 'Add' button in the table header, and a green arrow points to it. The interface also includes a 'Payment History' section and buttons for 'Save', 'Exit', 'Download', and 'Template Data Load'.

ADDING A LOAN

Campaign Electronic Reporting System (financeReport) - Google Chrome

cers-ext.mt.gov/CampaignTracker/app/financeReport/updateReport

Campaign E Edit Loans

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 Date

Last Name Entity or Last Name

First/Middle Initial First Name Middle Initial

Address Street Address

City/State/Zip City - Please Select - Zip Code

Employer Employer

Occupation Contributor's Occupation

Cash/Check Amount \$ Cash/Check Amount

In-Kind Value \$ 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 displays the 'Candidate Campaign Finance Report' for 'Coffee, J.' in the CERS system. The interface includes a navigation menu on the left, a header with 'Campaign Electronic Reporting System', and a main content area. The 'Candidate Information' section shows the candidate's name, mailing address, and reporting period. Below this, the 'Contributions' tab is active, and the 'Self-Contribution' subtab is selected. A green arrow points to the 'Self-Contribution' subtab, and a red star is placed next to the 'Add' button in the table below. The table has columns for 'Election Type', 'Cash/Check Amount', 'In-Kind Value', 'In-Kind Description', and 'Total to Date'. The table currently shows 'No records to view'.

- 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 shows the 'Edit Candidate Contributions' form in the Campaign Electronic Reporting System (CERS). The form is titled 'Row Details' and contains the following fields:

- Report Period:** From Date: 07/16/2021, To Date: 08/14/2021
- Report Detail Entry:**
 - Election Type: - Please Select -
 - Cash/Check Amount: \$ Cash/Check Amount
 - In-Kind Value: \$ In-Kind Value
 - In-Kind Description: Description of In-Kind Contribution
 - Total to Date Primary: \$ Total to Date Primary
 - Total to Date General: \$ Total to Date General

At the bottom of the form, there are two buttons: 'Submit' (green) and 'Cancel' (orange). The background shows the CERS dashboard with a sidebar menu containing 'Dashboard', 'Candidate', 'Committee', and 'State of Montana'. The footer includes links for 'Online Services', 'Commissioner of Political Practices', 'Privacy & Security', 'Accessibility', and 'Contact Us', along with the 'mt.gov' logo.

- 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 (CERS) interface. The main heading is "Candidate Campaign Finance Report" for candidate "Coffee, J." in the 2021 election year, running for Mayor. The report period is from 07/16/2021 to 08/14/2021. The "Expenditures" subtab is selected, and the "Add" button is highlighted with a red star. A green arrow points to the "Expenditures" subtab. The table below shows no records to view.

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

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: '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.



- 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



ALL EXPENDITURES MUST BE REPORTED WITH:

- 1) FULL NAME AND ADDRESS OF THE VENDOR
- 2) THE DATE OF THE EXPENDITURE
- 3) THE PURPOSE OF THE EXPENDITURE
- 4) THE FULL AMOUNT OF THE EXPENDITURE



- “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, 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
- ALL PROCESSING FEES PAID DURING THE REPORTING PERIOD CAN BE AGGREGATED AND REPORTED AS ONE EXPENDITURE

DATE/S of POSTS
When reporting paid social media posts be sure to include date range of paid posts and cost per day, month, period, etc.

PAID SOCIAL POST
Boosted, promoted, sponsored advertisements or social media posts may be considered election or electioneering communications. Such communications are required to be reported on a campaign finance report.

DATE/s & Cost of Boost/Ad

Boosted, Sponsored, Promoted, Advertisement

PURPOSE & SUBJECT MATTER

ATTRIBUTE (Paid for by)

SUBJECT MATTER
As with any expenditure, include the purpose, quantity (in case of social media, date range and cost per range), subject matter, and distinguish between like expenditures.

ATTRIBUTE
All paid social media posts must include the proper attribution (PAID FOR BY). It is recommended you attribute posts likely to be boosted at a later date. Include an attribution in the description section of the post for images and videos.

MONTANA
Commissioner of Political Practices

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

Report Detail Entry

Entity Type: - Please Select -

Election Type: - Please Select -

Date:

Last Name/Vendor Name:

First/Middle Initial:

Address:

City/State/Zip: - Please Select -

Amount: \$

Is this an over contribution limit refund?

Description of Expense:

Is this an electioneering communication?

Platform:

Quantity:

Subject Matter:

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

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 (financeReport) interface. The page title is "Candidate Campaign Finance Report" for "Coffee, J." in 2021. The "Debt/Loan Payments" subtab is active, and the "Add a New Debt" button is highlighted with a red star. A green arrow points to the "Debt/Loan Payments" subtab. The interface includes a navigation menu on the left, a main content area with tabs for "Contributions", "Expenditures", "Debt/Loan Payments", "Payments", "Attachments", "Summary", "File", and "Help". The "Add a New Debt" section contains a table with columns: Entity, Election Type, Purpose of Debt, Platform, Quantity, Specific Services, Date, Type, Debt Amount, and Balance Due. Below the table is a "View Debt/Loan Payment History" section with a "Payment History" subtab. The bottom of the page features buttons for "Save", "Exit", "Download", "Template Data Load", "Prev", and "Next".

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 form is titled 'Edit Debts' 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:**
 - Entity Type: - Please Select -
 - Election Type: - Please Select -
 - Date: Date (with calendar icon)
 - 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 - (State dropdown), Zip Code
 - Debt Amount: \$ Debt Amount
 - Purpose of Debt: 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
 - Platform: e.g. Facebook, KWRZ Radio, Havre Daily print ad, Helena IR digital ad, etc.

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 main content area displays a table of payments with the following data:

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

Below the table, there is a red star icon next to the '+ Add Payment' button. The interface also shows a 'Payment History' dropdown menu and a 'View 1 - 2 of 2' indicator.

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. The form is titled 'Row Details' and contains the following fields and information:

- 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 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

payments

REVIEW

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



STEP 3: CERTIFY AND FILE THE REPORT

The screenshot displays the 'Campaign Electronic Reporting System' interface. The 'File' tab is selected, and the 'Certify and File' subtab is active. The reporting period is set from 10/15/2021 to 11/15/2021, with a status of 'Pending'. A yellow warning box indicates 'Only End of Campaign' and states that a closing report should be filed only when all debts and obligations are settled. The 'Certification' section contains a checkbox for certifying the report as true and complete. At the bottom, there are buttons for 'Certify and File' and 'View Report'.

- 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!

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

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 2 YEARS!

MCA Contents TITLE 13 CHAPTER 37 Part 2 13-37-208 Treasurer to ...

Montana Code Annotated 2023

TITLE 13. ELECTIONS
CHAPTER 37. CONTROL OF CAMPAIGN PRACTICES
Part 2. Campaign Finance

Treasurer To Keep Records

13-37-208. Treasurer to keep records. (1) (a) Except as provided in subsection (1)(b), the campaign treasurer of each candidate, each political committee, and each joint fundraising committee shall keep detailed accounts of all contributions received and all expenditures made by or on behalf of the candidate, political committee, or joint fundraising committee that are required to be set forth in a report filed under this chapter. The accounts must be current within not more than 10 days after the date of receiving a contribution or making an expenditure.

(b) The accounts described in subsection (1)(a) must be current as of the 5th day before the date of filing of a report as specified in [13-37-228](#).

(2) Accounts of a deputy campaign treasurer must be transferred to the treasurer of a candidate or political committee before the candidate, political committee, or joint fundraising committee finally closes its books or when the position of a deputy campaign treasurer becomes vacant and no successor is appointed.

(3) Accounts kept by a campaign treasurer of a candidate, political committee, or joint fundraising committee must be preserved by the campaign treasurer for a period of 2 years from the date of the election.

History: En. 23-4783 by Sec. 8, Ch. 480, L. 1975; R.C.M. 1947, 23-4783(1), (3); amd. Sec. 251, Ch. 571, L. 1979; amd. Sec. 129, Ch. 56, L. 2009; amd. Sec. 1, Ch. 429, L. 2019; amd. Sec. 12, Ch. 494, L. 2021; amd. Sec. 14, Ch. 565, L. 2021; amd. Sec. 2, Ch. 557, L. 2023.

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: 03/24/17-08/23/17

An initial compliance examination has been completed for the above referenced report. Please review and make all required revisions of the following items (if any) to ensure campaign finance violations. Contact all checked marked and notes items. Should you need assistance please call 436.644.3619 or email cppo@compliance@pr.wis.gov. Thank you.

Inspection
 Exam

OTHER:

An initial fiscal 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. Mangon
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. Mangon
Montana Commissioner of Political Practices

CONTRIBUTIONS Section / Issues		
Section	Item	Explanation / Notes
Individual Contributors	Contributor Ford, Joe C has occupation listed as Consultant.	More detail is required as to the occupation of this contributor; please state the specific year of consulting.
Individual Contributors	Contributor McEwin, Colleen has occupation listed as Fundraiser	More detail is required as to the occupation of this contributor; please state what is meant by fundraiser.
Individual Contributors	Contributor Connor, Kay S has occupation listed as Investor	More detail is required as to the occupation of this contributor; please state what is meant by investor.
Individual Contributors	Address missing for contributor Macintosh, Ronald	Please provide the full mailing address for this contributor, as it is in our report.

OTHER:

EXPENDITURES Section / Issues		
Section	Item	Explanation / Notes
Expenditures: Other	Brook 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, and what was the specific purpose of each expenditure?
Expenditures: Other	Monroe, Talle	We need more detail for this expense: what is included in the "Event Entertainment" description?
Expenditures: Other	United States Post Office (2 entries)	We need more detail as to what was included in the Postage expenditure: 04/19/17 and 05/23/17.

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 AND 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](#)