COMMITTEE GUIDE
Oklahoma Campaign Reporting System (CRS)
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OVERVIEW

Oklahoma Ethics Commission’s Campaign Reporting System

This guide is intended as a desk reference for users of the Oklahoma Ethics Commission’s Campaign Reporting System.

Basic Rules
1. The Campaign Reporting System is for use by state candidate committees and non-candidate committees in the State of Oklahoma.
2. Submitted campaign disclosure reports are disclosed to the public via the Public Disclosure System.

Who Can Use the System?
Only Oklahoma registered candidate and non-candidate committees can use the system to create and report statements of organization, campaign disclosure reports, last minute contribution and expenditure reports, and reports of electioneering communications to the Oklahoma Ethics Commission.

The following reports are accessible online:
- S0-1 – Statement of Organization filed by Candidate Committees
- S0-2 – Statement of Organization filed by Non-Candidate Committees
- C-1R – Contribution and Expenditure Report filed by Candidate and Non-Candidate Committees
- C-3R – Statement of Inactivity filed by Candidate and Non-Candidate Committees
- C-4R – Last Minute Contribution Report filed by Candidate and Non-Candidate Committees
- C-5R – Last Minute Independent Expenditure Report filed by Non-Candidate Committees
- C-6R – Report of Electioneering Communications
REGISTRATION PROCESS (Password and Login Process)

**Step 1:**
New user selects “Need a login?” to begin the registration process.

**Step 2:**
Complete the registration process screens. Your registration request will be sent to the Ethics Commission for approval or denial within 2 business days. If your registration is approved, you will receive an email that validates your account and enables a password selection.

Select link in the email message to validate the account and to create security questions and an account password.
Step 3:
The link for Step 2 opens up a page where you can select two security questions and answer them. The security questions serve as an account validation if a password is reset or lost.

Step 4:
Select a password that is compliant with the state’s security policy. Remember your password, or keep it in a safe place. You will need your password and ethics number to login to the Campaign Reporting System. You will be required to select a new password every 90 days.
Step 1:
Upon initial login into the Campaign Reporting System, you will be required to file an S0-1 or S0-2 for your committee.

You must file a statement of organization for your committee (S0-1 for candidate committees or S0-2 for non-candidate committees).

Step 2:
Once you complete and submit an S-01 or S-02 (Statement of Organization) you will have access to the Campaign Reporting System’s Main Menu.
Welcome Test 2012 (1/2/01)

Committee Administration

No Pending Reports at this time

File New Reports

View Submitted Reports

Arend Submitted Reports

Logon

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CREATING A CONTRIBUTION AND EXPENDITURE REPORT (C-1R)

Step 1:
After initial login into the Campaign Reporting System, you will be ready to file a C-1R for your recently registered committee.

Select File New Reports on the Main Menu. You will have access to create a new report applicable to your committee type and the period.
Step 2:
Select the C-1R from the drop down of available reports.

Step 3:
Select the reporting period for the C-1R. Your options may be quarterly, monthly, annual or based on election dates. The options vary according to your committee type.
Step 4:
If applicable, you will complete information to create the initial C-1R report.

Step 5:
The C-1R menu will enable you to enter contributions, expenditures, view the C-1R and submit it to the Oklahoma Ethics Commission.
Step 6:
The manage contributions option allows you to enter contributions into the system for the C-1R report and its schedules. Schedule totals are displayed to assist you.

Step 7:
Follow the onscreen steps to add a contribution into the system. Below is an example of a schedule transaction.

a. Select add a contribution from the Schedule A Menu.
b. Enter a contributor name or a partial name to search the contributor database.

c. If your contributor is not listed, select create a new contributor.
Enter contributor address information.

If this is the first time the contributor is entered, you will be asked to enter an aggregate amount.
Step 8:
Return to the C-1R menu and select the “Manage Expenditure Tool” to enter expenditures for the C-1R report.
Step 9:  
The manage expenditures option allows you to enter expenditures into the system for the C-1R report and its schedules. Schedule totals are displayed to assist you.

Step 10:  
Follow the onscreen steps to add an expenditure into the system. Below is an example of a Schedule E transaction.

a.  
Select add expenditure from the Schedule E Menu.
Enter a vendor name and hit continue to search the vendor database.

If the vendor exists, address information will be available for selection and will be pre-populated by the system.

Enter vendor address information and hit continue.
d. Enter expenditure detail and select submit transaction.

Transactions itemized as "Loan - Payment" are pulled from the Schedule J. If you need to add or delete these transactions, please visit Schedule J.

To enter a transaction on another schedule, hit the back button.

The transaction was added successfully.
Step 11:
From the C-1R menu, you can view the C-1R form before submitting it to the Ethics Commission.

Select View C-1R form to see a copy of the C-1R form prior to submitting it to the Ethics Commission.

Once the report is complete, select Submit report to Oklahoma Ethics Commission.
Step 12:
Below is an example of the View C-1R form from the C-1R main menu.

Click specific schedules to access transaction details.

To print the form, select the printer-friendly version.
Step 13:
Below is an example of the Submit Report to the Oklahoma Ethics Commission option. You are able to review C-1R line item totals before the report is submitted.

<table>
<thead>
<tr>
<th>Description</th>
<th>Total for this reporting period</th>
<th>Total Campaign-to-date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions accepted from persons other than committees (Schedule A)</td>
<td>1,145.00</td>
<td>1,145.00</td>
</tr>
<tr>
<td>Contributions accepted from committees (Schedule A1)</td>
<td>126.00</td>
<td>126.00</td>
</tr>
<tr>
<td>Loans, promissory notes or security agreements received (Schedule B)</td>
<td>3,000.00</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Other receipts (refunds, rebates, interest, sale of assets, etc) (Schedule C)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Total monetary receipts (Schedule A + Schedule A1 + Schedule B + Schedule C)</td>
<td>4,271.00</td>
<td>4,271.00</td>
</tr>
<tr>
<td>In-kind contributions (Schedule D)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Written agreements (Schedule D1)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Aggregate total receipts (Total Monetary Receipts + Schedule A2 + Schedule D1)</td>
<td>4,271.00</td>
<td>4,271.00</td>
</tr>
<tr>
<td>Expenditures Incurred (Schedule E)</td>
<td>101.00</td>
<td>101.00</td>
</tr>
<tr>
<td>Monetary Transfers (Schedule G)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Aggregate total monetary expenditures (Schedule E + Schedule F + Schedule G)</td>
<td>101.00</td>
<td>101.00</td>
</tr>
<tr>
<td>In-kind Transfers (Schedule H)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Expenditure Incurred (Schedule I)</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Balance on loans owed by committee (Schedule J)</td>
<td>3,000.00</td>
<td></td>
</tr>
<tr>
<td>Funds Available</td>
<td>1,000.00</td>
<td></td>
</tr>
<tr>
<td>Monetary Receipts</td>
<td>4,271.00</td>
<td></td>
</tr>
<tr>
<td>Total Monetary Receipts</td>
<td>5,271.00</td>
<td></td>
</tr>
<tr>
<td>Disbursements</td>
<td>101.00</td>
<td></td>
</tr>
<tr>
<td>Funds Remaining</td>
<td>5,170.00</td>
<td></td>
</tr>
</tbody>
</table>
Step 14:
The system indicates that the C-1R has been submitted to the Ethics Commission.