



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.

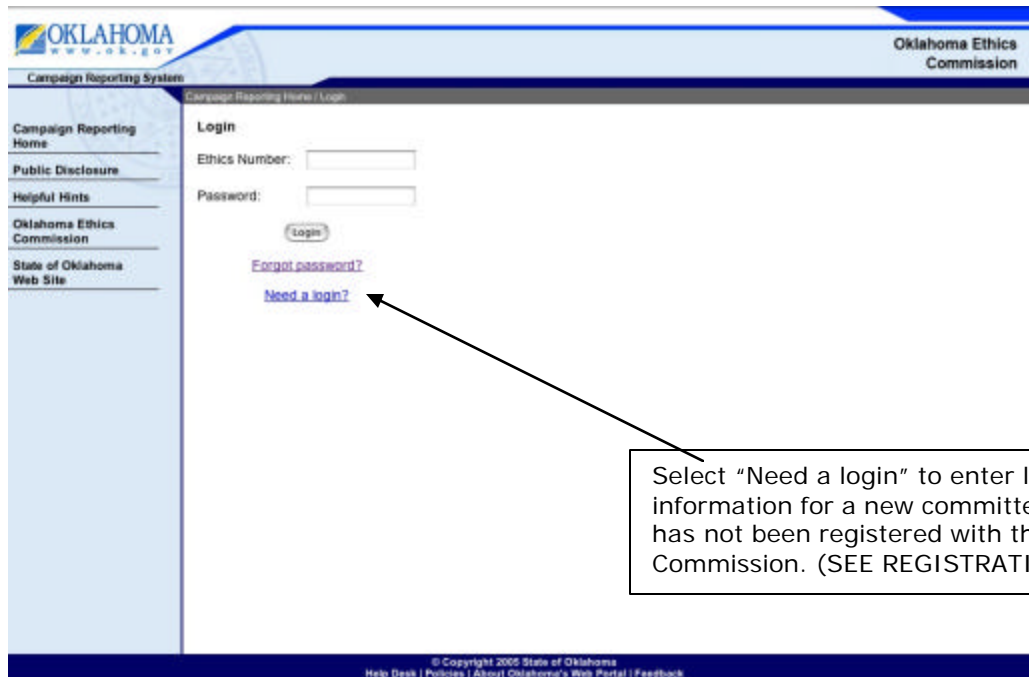
The following reports are accessible online:

- 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:

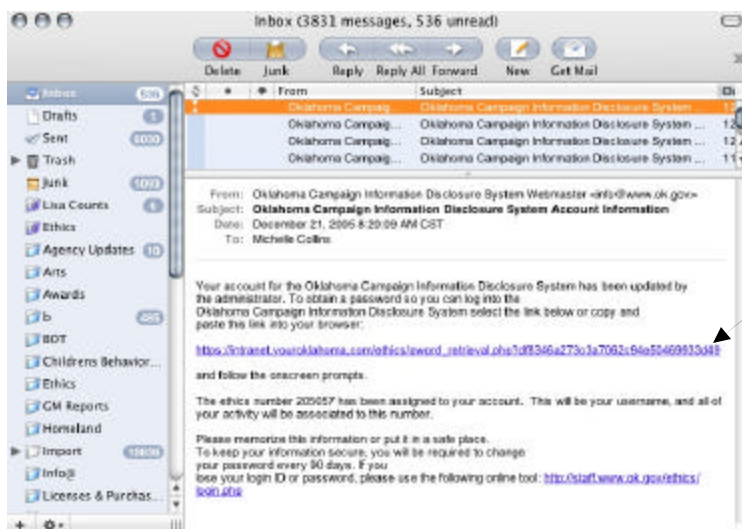
New user selects "Need a login?" to begin the registration process.



Select "Need a login" to enter login information for a new committee that has not been registered with the Ethics Commission. (SEE REGISTRATION)

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.

The screenshot shows the 'Login Security Questions' page. At the top left is the Oklahoma logo and 'www.ok.gov'. At the top right is 'Oklahoma Ethics Commission'. Below the logo is 'Campaign Reporting System' and 'Campaign Reporting Home / Security Questions'. A left sidebar contains links: 'Campaign Reporting Home', 'Public Disclosure', 'Helpful Hints', 'Contact Us', 'Oklahoma Ethics Commission', and 'State of Oklahoma Web Site'. The main content area is titled 'Login Security Questions' and contains the text: 'In order to help provide as much security as possible for your account, we ask that you answer both of the following security questions. You will be asked to respond to these questions anytime you request your login and password information for the Campaign Reporting System.' There are two dropdown menus for questions: 'What was the name of your first pet?' with an answer of 'cccc', and 'In what city were you born?' with an answer of 'bartlesville'. A 'Submit Answers' button is at the bottom. The footer contains '© Copyright 2005 State of Oklahoma' and links for 'Help Desk | Policies | About Oklahoma's Web Portal | Feedback'.

Step 4:

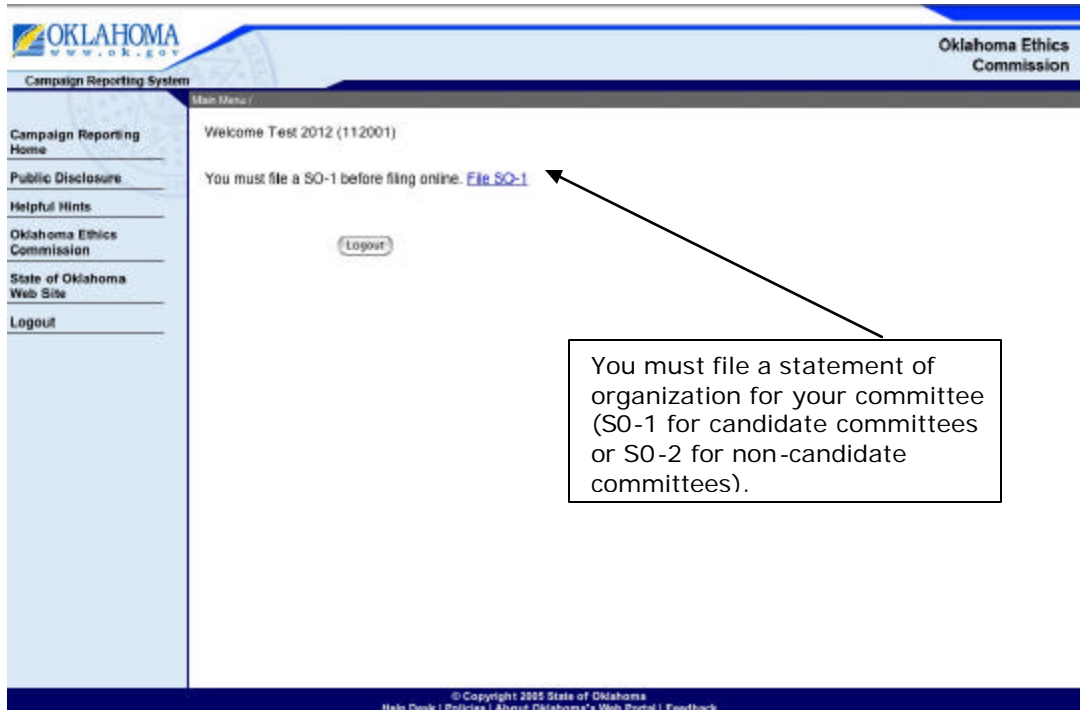
Select a password that is compliant with the state's security policy. Remember your password, or keep it in a safe place. You will need your password and ethics number to login to the Campaign Reporting System. You will be required to select a new password every 90 days.

The screenshot shows the 'Create a Password' page. At the top left is the Oklahoma logo and 'www.ok.gov'. At the top right is 'Oklahoma Ethics Commission'. Below the logo is 'Campaign Reporting System' and 'Campaign Reporting Home / Create Password'. A left sidebar contains links: 'Campaign Reporting Home', 'Public Disclosure', 'Helpful Hints', 'Contact Us', 'Oklahoma Ethics Commission', and 'State of Oklahoma Web Site'. The main content area is titled 'Create a Password' and contains the text: 'Enter a password to be used to login to the Campaign Reporting System. Your password must match the following criteria in order to be successful:'. A bulleted list of criteria follows: 'Must be a minimum of 8 characters long.', 'Not based on anything somebody could easily guess (birth date, telephone number, etc.)', 'Free of consecutive identical characters.', 'Can not be all-numeric or all-alphabetical groups.', and 'Examples of valid passwords are: adef435c, A9d2Z4b0, etc.'. Below the list are two password input fields: 'Password: [mask]' and 'Re-Enter Password: [mask]', followed by a 'Submit' button. The footer contains '© Copyright 2005 State of Oklahoma' and links for 'Help Desk | Policies | About Oklahoma's Web Portal | Feedback'.

CAMPAIGN REPORTING SYSTEM

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.



Step 2:

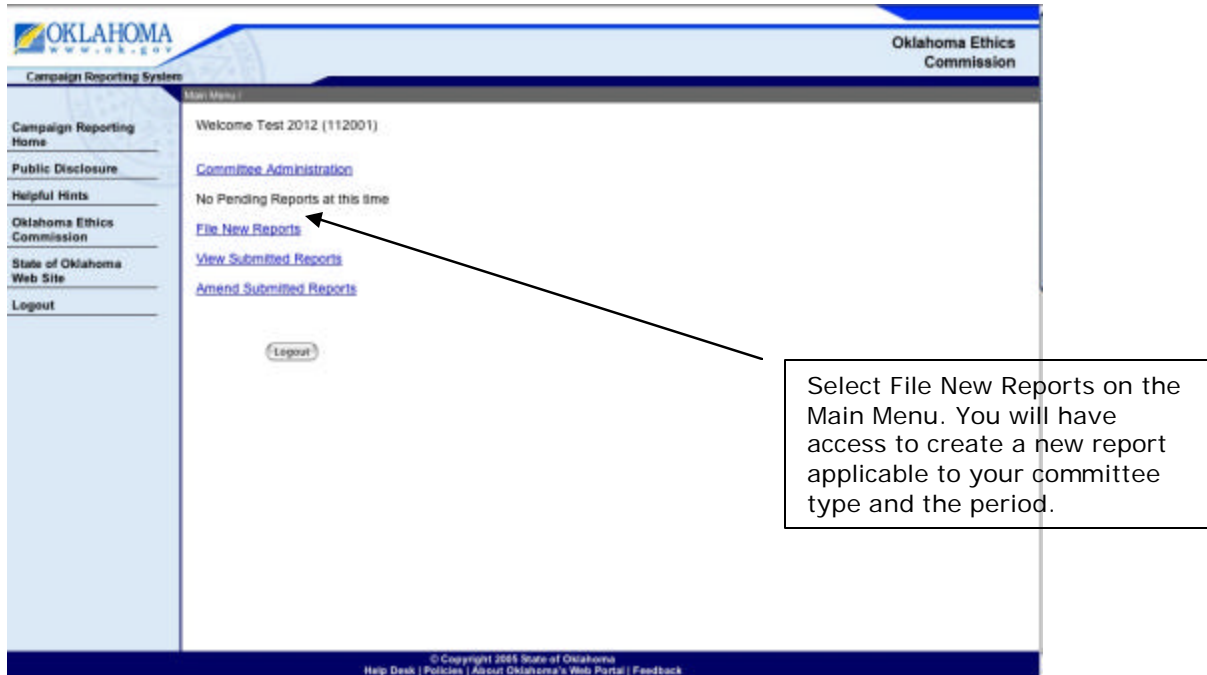
Once you complete and submit an S-01 or S-02 (Statement of Organization) you will have access to the Campaign Reporting System's Main Menu.

The screenshot displays the Oklahoma Campaign Reporting System interface. At the top left is the Oklahoma logo with the text "OKLAHOMA www.ok.gov". To the right of the logo, the text "Campaign Reporting System" is visible. In the top right corner, the text "Oklahoma Ethics Commission" is displayed. A vertical navigation menu on the left side contains the following items: "Campaign Reporting Home", "Public Disclosure", "Helpful Hints", "Oklahoma Ethics Commission", "State of Oklahoma Web Site", and "Logout". The main content area features a "My Menu" section with the following items: "Welcome Test 2012 (112001)", "Committee Administration", "No Pending Reports at this time", "File New Reports", "View Submitted Reports", and "Amend Submitted Reports". A "Logout" button is located at the bottom of the main content area. At the very bottom of the page, a footer contains the text: "© Copyright 2005 State of Oklahoma Help Desk | Policies | About Oklahoma's Web Portal | Feedback".

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

Step 1:

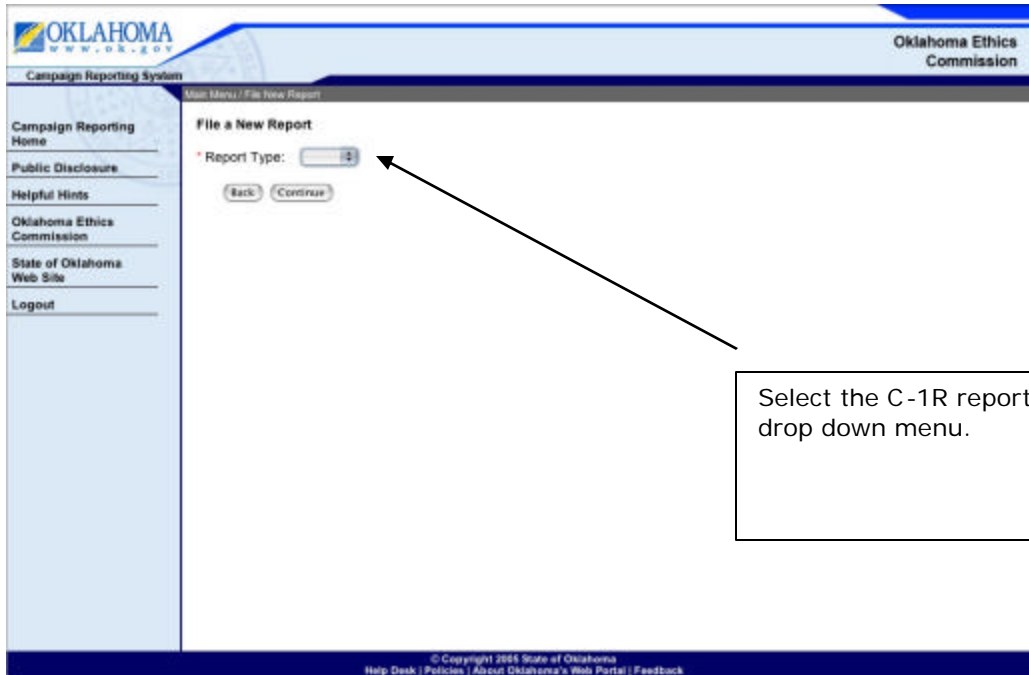
After initial login into the Campaign Reporting System, you will be ready to file a C -1R for your recently registered committee.



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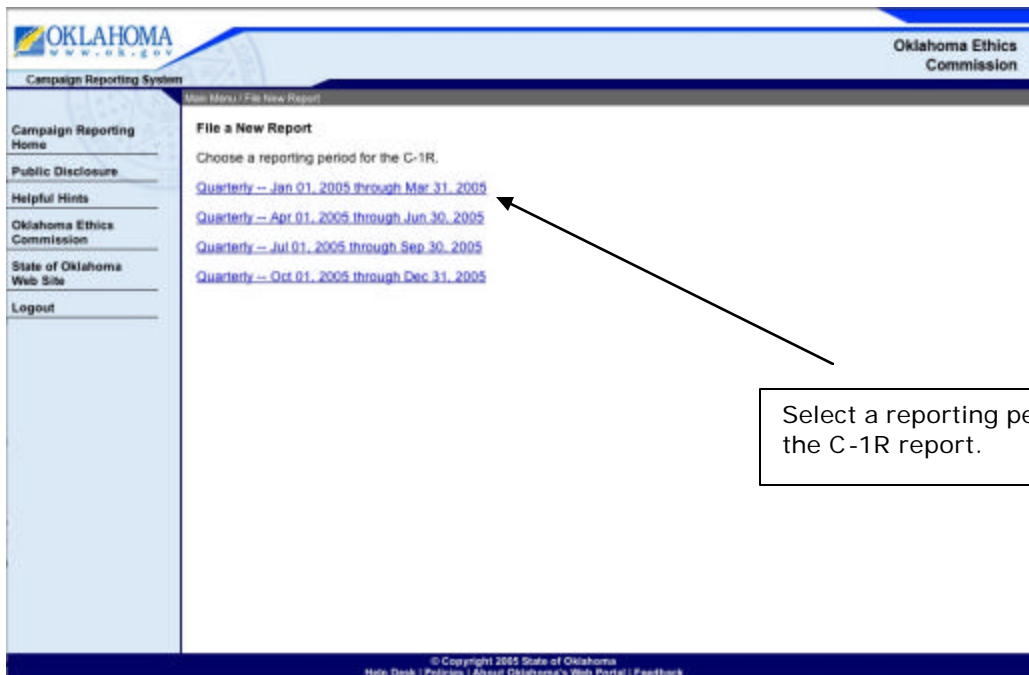
Step 2:

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.

The screenshot shows the 'Initial C-1R Report' form in the Oklahoma Campaign Reporting System. The page header includes the Oklahoma logo and 'Oklahoma Ethics Commission'. The left sidebar contains navigation links: Campaign Reporting Home, Public Disclosure, Helpful Hints, Oklahoma Ethics Commission, State of Oklahoma Web Site, and Logout. The main content area is titled 'Initial C-1R Report' and contains the following text: 'Our records indicate that this is the first C-1R report being filed for your committee. Please answer the following questions in order to start the report.' Below this are three questions with radio button options: 1. 'What is the date of the first contribution accepted or expenditure made?' with a date input field (mm/dd/yyyy). 2. 'Carry forward amount? (Do not subtract any transfer of debt or loans) Enter zero for no carry forward amount.' with a dollar sign input field. 3. 'Do you wish to itemize and report all transactions \$50 or under? You are not required to disclose contributions or expenditures \$50 or less in the aggregate. Note: If you decide to itemize, these transactions will be accessible through the public disclosure system.' with Yes/No radio buttons. A fourth question asks 'Is this the final report because you are closing out your committee?' with Yes/No radio buttons. At the bottom of the form are 'Back' and 'Continue' buttons. The footer contains copyright information for 2005 and links for Help Desk, Policies, About Oklahoma's Web Portal, and Feedback.

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.

The screenshot shows the C-1R menu in the Oklahoma Campaign Reporting System. The page header includes the Oklahoma logo and 'Oklahoma Ethics Commission'. The left sidebar contains navigation links: Campaign Reporting Home, Public Disclosure, Helpful Hints, Oklahoma Ethics Commission, State of Oklahoma Web Site, and Logout. The main content area is titled 'C-1R for the reporting period Jan 01, 2005 to Mar 31, 2005.' and contains four blue hyperlinks: 'Manage Contributions', 'Manage Expenditures', 'View C-1R Form', and 'Submit report to Oklahoma Ethics Commission'. At the bottom of the menu is a 'Back' button. The footer contains copyright information for 2005 and links for Help Desk, Policies, About Oklahoma's Web Portal, and Feedback.

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.

Test 100000 100000

Contribution Type	Schedule	Reporting Period Totals
Contributions from persons other than committees	Schedule A	1,045.00
Refunds from persons other than committees	Schedule A	-55.00
Contributions from committees	Schedule A1	125.00
Refunds from committees	Schedule A1	-25.00
Loans, promissory notes, security agreements	Schedule B	3,000.00
Refunds, rebates, interest, sales of assets, etc	Schedule C	.00
In-kind contributions	Schedule D	.00
Written agreements	Schedule D1	.00
Fundraisers	Schedule A	.00

[Back](#)

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Step 7:

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

a.

Schedule A for the reporting period Oct 01, 2005 to Dec 31, 2005.

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

Transactions itemized as "loans" are pulled from the Schedule B. If you need to edit or delete these transactions, please [visit Schedule B](#).

Transactions itemized as "written agreements" are pulled from the Schedule D1. If you need to edit or delete these transactions, please [visit Schedule D1](#).

[Add a contribution](#)

Contributor	Occupation and Employer or Principal Business Activity	Date Accepted	Amount of Contribution	Nature of Contribution	Campaign-to-date	Action
James Spader	Actor Self	Oct 05, 2005	3,000.00	Loan	3,000.00	Use Contributor Edit Delete
MIKE TOADY	clerk joe's crab shack	Oct 03, 2005	100.00	Written Instrument	100.00	Use Contributor Edit Delete
Mike Collins	Mechanical Engineer Circor	Oct 02, 2005	1,000.00	Written Instrument	945.00	Use Contributor Edit Delete

[Add a contribution](#)

[Back](#)

Select add a contribution from the Schedule A Menu.

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b.

The screenshot shows the Oklahoma Ethics Commission Campaign Reporting System interface. The header includes the Oklahoma logo and the text "Oklahoma Ethics Commission". The main content area contains a search form with the following fields:

- * First Name:
- Middle Name:
- * Last Name:

Below the fields are "Back" and "Continue" buttons. An arrow points from a text box to the "Continue" button.

Enter a contributor name or a partial name to search the contributor database.

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c.

The screenshot shows the Oklahoma Ethics Commission Campaign Reporting System interface. The header includes the Oklahoma logo and the text "Oklahoma Ethics Commission". The main content area displays "Schedule A for the reporting period Oct 01, 2005 to Dec 31, 2005." and a table of contributors.

[Create a New Contributor](#)

Contributor	Address	Occupation, Employer or Principal Business Activity	Campaign-to-date	Action
PAUL J SMITH	201 N. shartel Oklahoma City, OK 73103	clerk test	.00	Enter Contribution

[Create a New Contributor](#)
[Back](#)

If your contributor is not listed, select create a new contributor.

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d.

The screenshot shows the 'Contributor Info' page of the Campaign Reporting System. The left sidebar contains navigation links: Campaign Reporting Home, Public Disclosure, Helpful Hints, Contact Us, Oklahoma Ethics Commission, State of Oklahoma Web Site, and Logout. The main content area has a breadcrumb trail: Main Menu / C-TR / Contributor Menu / Schedule A / Contributor Type / Contributor Name / Contributor Info. The form fields are: Street Address (123 Main Street), City (Oklahoma City), State (OK - Oklahoma), Zip (73118), Occupation (Office Manager), and Employer (State of Oklahoma). There are 'Back' and 'Continue' buttons at the bottom. A callout box with an arrow pointing to the 'Continue' button contains the text: 'Enter contributor address information.'

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e.

The screenshot shows the 'Add Contribution' page of the Campaign Reporting System. The left sidebar is the same as in screenshot d. The breadcrumb trail is: Main Menu / C-TR / Schedule A / Add Contribution. The form is titled 'Contribution Detail' and includes: Date Accepted (10 / 01 / 2005), Amount (\$100), Previous Aggregate Amount (\$50), and Nature of Contribution (Written Instrument). There are 'Back' and 'Submit Transaction' buttons. A callout box with an arrow pointing to the 'Previous Aggregate Amount' field contains the text: 'If this is the first time the contributor is entered, you will be asked to enter an aggregate amount.'

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f.

OKLAHOMA
www.ok.gov

Oklahoma Ethics Commission

Campaign Reporting System

Main Menu / File C-1R / Contribution Menu / Schedule A

Schedule A for the reporting period Oct 01, 2005 to Dec 31, 2005.

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

Transactions itemized as "loans" are pulled from the Schedule B. If you need to edit or delete these transactions, please [visit Schedule B](#).

Transactions itemized as "written agreements" are pulled from the Schedule D1. If you need to edit or delete these transactions, please [visit Schedule D1](#).

The transaction was added successfully.

[Add a contribution](#)

Contributor	Occupation and Employer or Principal Business Activity	Date Accepted	Amount of Contribution	Nature of Contribution	Campaign-to-date	Action
James Spader	Actor Self	Oct 05, 2005	3,000.00	Loan	3,000.00	Use Contributor
MIKE TOADY	clerk Joe's crab shack	Oct 03, 2005	100.00	Written Instrument	100.00	Edit Delete Use Contributor
Mike Collins	Mechanical Engineer Circor	Oct 02, 2005	1,000.00	Written Instrument	945.00	Edit Delete Use Contributor
Joe Smith	Office Manager State Of Oklahoma	Oct 01, 2005	100.00	Written Instrument	150.00	Edit Delete Use Contributor

[Add a contribution](#)

[Back](#)

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Step 8:

Return to the C-1R menu and select the "Manage Expenditure Tool" to enter expenditures for the C-1R report.

OKLAHOMA
www.ok.gov

Oklahoma Ethics Commission

Campaign Reporting System

Main Menu / Pending Reports / File C-1R

C-1R for the reporting period Jan 01, 2005 to Mar 31, 2005.

[Manage Contributions](#)

[Manage Expenditures](#)

[View C-1R Form](#)

[Submit report to Oklahoma Ethics Commission](#)

[Back](#)

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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.

The screenshot shows the Oklahoma Ethics Commission Campaign Reporting System interface. The main content area displays a table with the following data:

Expenditure Type	Schedule	Reporting Period Totals
Monetary Expenditures	Schedule E	1.00
Monetary transfers to other committees	Schedule G	.00
Monetary transfer refunds	Schedule G	.00
In-Kind transfers to other committees	Schedule H	.00
Expenditures incurred	Schedule I	.00
Loans owed by committee	Schedule J	3,000.00

Below the table is a "Back" button. The left sidebar contains navigation links such as "Campaign Reporting Home", "Public Disclosure", "Helpful Hints", "Contact Us", "Oklahoma Ethics Commission", "State of Oklahoma Web Site", and "Logout". The top right corner displays "Oklahoma Ethics Commission".

Step 10:

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

a.

The screenshot shows the "Add an expenditure" screen for Schedule E. The main content area contains the following text:

Schedule E for the reporting period Oct 01, 2005 to Dec 31, 2005.
Transactions itemized as "Loan - Payment" are pulled from the Schedule J. If you need to edit or delete these transactions, please [visit Schedule J](#).
To enter a transaction on another schedule, hit the back button.

Below the text is a table with the following data:

Date	Description and Purpose	Vendor	Amount	Action
Oct 01, 2005	description - purpose	Test	1.00	Edit Delete Use Vendor

Below the table is an "Add an expenditure" link and a "Back" button. An arrow points from a text box to the "Add an expenditure" link.

Select add expenditure from the Schedule E Menu.

The left sidebar and top navigation are identical to the previous screenshot.

b.

The screenshot shows the Oklahoma Campaign Reporting System interface. The header includes the Oklahoma logo and the text "Oklahoma Ethics Commission". The main content area is titled "Vendor Name" and contains a search form. The form has a label "Vendor Name:" followed by a text input field containing "Sam's Subs". Below the input field are two buttons: "Back" and "Continue". An arrow points from a text box to the "Continue" button. The text box contains the following instructions:

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.

The footer of the page contains the copyright notice "© Copyright 2005 State of Oklahoma" and links for "Help Desk", "Policies", "About Oklahoma's Web Portal", and "Feedback".

c.

The screenshot shows the Oklahoma Campaign Reporting System interface. The header includes the Oklahoma logo and the text "Oklahoma Ethics Commission". The main content area is titled "Vendor Info" and contains a form for entering vendor address information. The form has four fields: "Street Address:" with the value "1 Main Street", "City:" with the value "Oklahoma City", "State:" with a dropdown menu showing "OK - Oklahoma", and "Zip:" with the value "73118". Below the input fields are two buttons: "Back" and "Continue". An arrow points from a text box to the "Continue" button. The text box contains the following instructions:

Enter vendor address information and hit continue.

The footer of the page contains the copyright notice "© Copyright 2005 State of Oklahoma" and links for "Help Desk", "Policies", "About Oklahoma's Web Portal", and "Feedback".

d.

Expenditure Detail

* Date of Expenditure: 10 / 3 / 2005 (mm/dd/yyyy)

* Amount: \$ 100.00

* Description: paint and other supplies

* Purpose: advertising posters

Enter expenditure detail and select submit transaction.

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e.

Schedule E for the reporting period Oct 01, 2005 to Dec 31, 2005.

Transactions itemized as "Loan - Payment" are pulled from the Schedule J. If you need to edit or delete these transactions, please [visit Schedule J](#).

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

The transaction was added successfully.

[Add an expenditure](#)

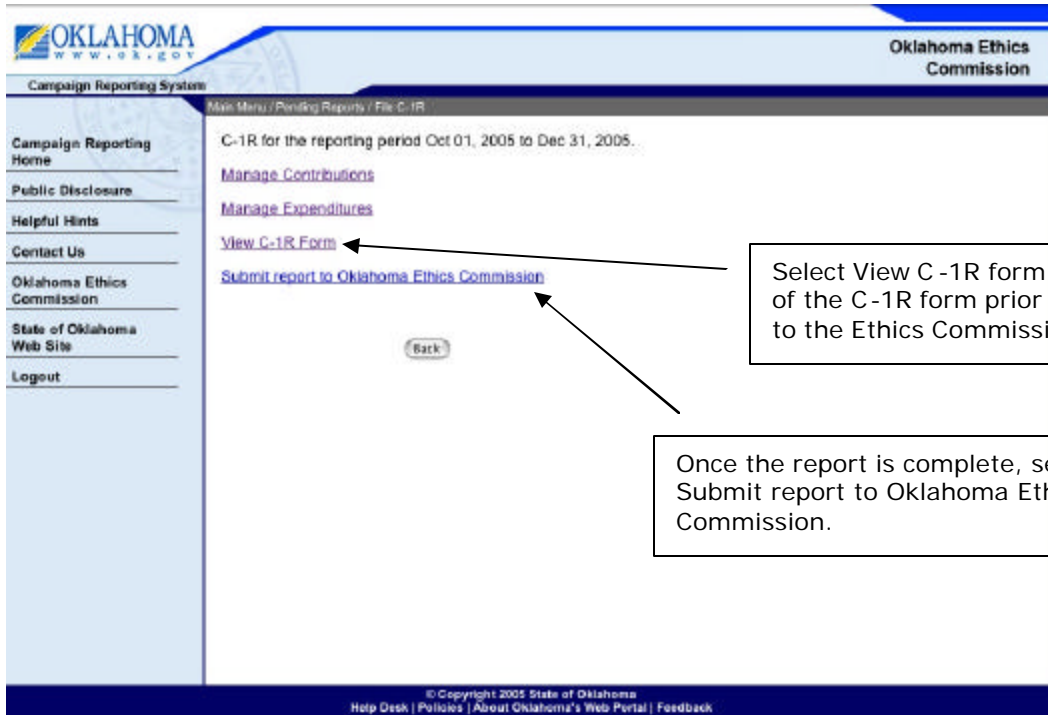
Date	Description and Purpose	Vendor	Amount	Action
Oct 03, 2005	paint and other supplies - advertising posters	Sam's Subs	100.00	Edit Delete Use Vendor
Oct 01, 2005	description - purpose	Test	1.00	Edit Delete Use Vendor

[Add an expenditure](#)

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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.


The screenshot displays the 'View C-1R' form within the Oklahoma Ethics Commission's Campaign Reporting System. The form is titled 'CAMPAIGN CONTRIBUTIONS AND EXPENDITURES REPORT' and is identified as FORM C1-R, Rev. 6/04. It is for the State of Oklahoma and includes fields for the committee name (Test 100000), address (111 Test, Poteau, OK 74953), and candidate name (Darrell Farna). The report covers the period from Oct 01, 2005 to Dec 31, 2005. A table shows receipts and expenditures, with a total aggregate receipt of \$4,271.00 and total aggregate expenditure of \$101.00. A 'CASH SUMMARY' section shows funds available of \$1,000.00, total receipts of \$4,271.00, and total disbursements of \$101.00, leaving a balance of \$5,170.00. The form is signed by Michelle T Collins on 1/1/06. Navigation buttons for 'Back' and 'Printer Friendly' are visible at the bottom.

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.


Oklaoma Ethics Commission

Campaign Reporting System

Home

Public Disclosure

Helpful Hints

Contact Us

Oklaoma Ethics Commission

State of Oklaoma Web Site

Logout

Home / Pending Reports / Submit C-1R

This action will submit the C-1R for the reporting period Oct 01, 2005 to Dec 31, 2005.
Please confirm that all of your totals are accurate prior to submitting the C-1R.
To view and print the report and the schedules as they will appear in the public disclosure [click here](#).

Carry Forward 1,000.00

	Total for this reporting period	Total Campaign-to-date
Contributions accepted from persons other than committees (Schedule A)	1,145.00	1,145.00
Contributions accepted from committees (Schedule A1)	126.00	126.00
Loans, promissory notes or security agreements received (Schedule B)	3,000.00	3,000.00
Other receipts (refunds, rebates, interest, sale of assets, etc) (Schedule C)	.00	.00
Total monetary receipts (Schedule A + Schedule A1 + Schedule B + Schedule C)	4,271.00	4,271.00
In-kind contributions (Schedule D)	.00	.00
Written agreements (Schedule D1)	.00	.00
Aggregate total receipts (Total Monetary Receipts + Schedule D + Schedule D1)	4,271.00	4,271.00
Expenditures Made (Schedule E)	101.00	101.00
Monetary Transfers (Schedule G)	.00	.00
Aggregate total monetary expenditures (Schedule E + Schedule F + Schedule G)	101.00	101.00
In-kind Transfers (Schedule H)	.00	.00
Expenditure Incurred (Schedule I)	.00	.00
Balance on loans owed by committee (Schedule J)	3,000.00	3,000.00
Funds Available	1,000.00	1,000.00
Monetary Receipts	4,271.00	4,271.00
Total Monetary Receipts	5,271.00	5,271.00
Disbursements	101.00	101.00
Funds Remaining	5,170.00	5,170.00

Step 14:

The system indicates that the C-1R has been submitted to the Ethics Commission.

The screenshot displays the Oklahoma Campaign Reporting System interface. At the top left is the Oklahoma logo with the text 'OKLAHOMA WWW.OK.GOV'. At the top right, it says 'Oklahoma Ethics Commission'. Below the logo is a navigation menu with the following items: Campaign Reporting Home, Public Disclosure, Helpful Hints, Contact Us, Oklahoma Ethics Commission, State of Oklahoma Web Site, and Logout. The main content area shows a confirmation message: 'C-1R for the reporting period Jan 01, 2006 to Mar 31, 2006 has been submitted. You have successfully filed your C-1R to the Oklahoma Ethics Commission. [Click here to print a copy of the C-1R submitted.](#) You may also view and print this form and any submitted forms in the future through the Main Menu. The Candidate, or the treasurer for a judicial candidate, must file a [written verification form \(C-VR\)](#) within 5 business days of filing this report.' A 'Main Menu' button is centered below the message. At the bottom of the page, there is a footer with the text: '© Copyright 2005 State of Oklahoma Help Desk | Policies | About Oklahoma's Web Portal | Feedback'.