

Campaign Finance Reporter

Technical Bulletin

Issuing Political Contribution Refund Receipts with Campaign Finance Reporter.

This bulletin will Provide some basic information about the political contribution refund (PCR) program and will explain:

- How to generate PCR receipts.
- How to generate mailing labels for the PCR receipts.
- How to indicate in the software that a paper PCR receipt was issued.
- How to indicate voter eligibility.
- How to reprint PCR receipts

The Minnesota political contribution refund program has been reinstated for contributions made on or after July 1, 2013

- Any contributions made before July 1, 2013, are not eligible for a PCR receipt.
- Only cash contributions may be issued a PCR receipt; in-kind contributions are not eligible. If a receipt is given for a contribution where the donor received something of value in return, you may need to reduce the amount of the receipt by that value. The Department of Revenue's bulletin explaining this issue is here:

http://www.revenue.state.mn.us/law_policy/revenue_notices/RN_91-16.pdf

- Only eligible Minnesota voters may apply for a PCR refund.
- The maximum PCR refund is \$50 per contributor or \$100 per married couple

The Board's Campaign Finance Reporter software will allow users to automatically generate valid political contribution refund receipts for contributions that have not already been issued PCR receipts.

1. Issuing a PCR receipt with Campaign Finance Reporter

Select menu item "Data Merge" then item "Print Documents".

On the Print Documents screen, Under Print Options, check the radio button next to PCR Receipts.

Click the Print Preview button.

All eligible PCR Receipts are displayed. The receipts can be printed by clicking the Print button (Icon) at the upper left of the window.

Click File/Exit to close the print window to return to the Print Documents screen.

Upon returning to CFR, you are prompted to "Update PCR sent date for these PCRs?". Click "Yes". This will mark them as sent/generated.

If there was a problem with printing, click "No" and you will be able to do the above operation again.

2. Printing mailing labels or envelopes to match your PCR receipts

Immediately following the printing of PCR receipts and while still on the Print Documents screen, you will want to print labels (or envelopes) for mailing the PCR receipts to the constituents.

On the Print Documents screen, Under Print Options, check the radio button next to labels (or envelopes).

Click the Print Preview button.

Labels corresponding to the PCR Receipts are displayed. The labels can be printed by clicking the Print button (Icon) at the upper left of the window.

Click File/Exit to close the print window to return to the Print Documents screen.

On the Print Documents screen, click the Cancel button to return to Campaign Finance Reporter.

3. Indicating to Campaign Finance Reporter that a paper receipt was given to the donor

The Board's Campaign Finance Reporter software will allow users to record PCR receipts manually Issued by use of a PCR Receipt book. Recording that a PCR receipt was manually created will keep CFR from creating a new receipt, as was described in section 1, above.

If you issued a paper receipt using a PCR Receipt book, when you record the receipt into Campaign Finance Reporter, enter the number of the PCR receipt from the lower-right of the PCR stub into the field labeled "PCR Number". Note: Any text or numbers that you enter into the PCR Number field will suppress the batch printing of a PCR receipt by CFR. So rather than recording the full paper receipt number into the receipt record, you could simply enter "x" or "paper" or some other indicator.

Save the receipt.

The PCR receipt number is now saved on the receipt transaction and the Campaign Finance Reporter Finance Software will not generate a PCR receipt for this transaction.

4. Only people eligible to vote in Minnesota may be given a PCR

You may verify or indicate the entities eligible voter status by right click on the source field when you are entering a receipt, or by going directly to the entity record for the individual you wish to review or edit..

The "Eligible Voter?" Checkbox must be checked for the system to generate a PCR receipt for this constituent.

This checkbox is automatically checked when MN is entered in the State field, because most Minnesota residents who donate to candidates or party units are eligible voters. However, it is up to the treasurer to make sure that the person is actually an eligible voter. The check box must be set to "unchecked" by clicking it if the subject person is not eligible to vote in Minnesota.

If you are entering an out of state address for a person who is eligible to vote in Minnesota, you must manually check the "Eligible Voter" checkbox so that CFR will be able to issue a PCR receipt to this contributor.

5. Reprinting PCR receipts that were generated by CFR.

The Board's Campaign Finance Reporter software will allow users to reprint PCR receipts.

Reprinting a receipt will be easiest if you look up the receipt number you want to reprint first. You can do this by going to the receipts form and using the Lookup button to find the subject receipt. Make a note of the number.

PCR receipts are reprinted by selecting menu items "Data-Merge", then "Print Documents".

On the Print Documents screen, Under Print Options, check the radio button next to Reprint PCR Receipts.

You may reprint all or selected PCR receipts.

If you wish to print one selected PCR receipts, click the Selection Criteria button.

Enter the criteria to filter the desired PCR receipts.

To print one receipt with the number 10033_1017, enter the following in the selection criteria:

In the first field, use the dropdown arrow to select: PCR Number

In the second field select the equals sign

In the third field enter the number of the receipt you wish to reprint: 10033_1017.

Click the OK button.

Click the Print Preview button.

The desired PCR Receipts are displayed.

The receipts can be printed by clicking the Print button (Icon) at the upper left of the window.

Click File/Exit to close the print window to return to the Print Documents screen.

Upon returning to CFR, you are prompted to "Update PCR sent date for these PCRs?". Click Yes. This will mark them as sent/generated.

For more further assistance, review the online video tutorial on the subject of printing PCR receipts, here:

http://www.cfboard.state.mn.us/training/PCR_Receipts/

If you still have questions after reviewing this bulletin and the video tutorial, contact Andrew Olson for support at andrew.d.olson@state.mn.us or 651-539-1190.