



STATE OF MICHIGAN
TERRI LYNN LAND, SECRETARY OF STATE
DEPARTMENT OF STATE
LANSING

DATE: December 2, 2009
TO: Committees using MERTS Plus Campaign Finance Software
FROM: Michigan Department of State, Bureau of Elections
SUBJECT: Updated Version of MERTS Plus

An updated version of MERTS Plus with added features is now available for committees using MERTS Plus to submit Campaign Statements. A description of the software enhancements is provided in this memo.

Please refer to the enclosed loading instructions to obtain the updated software. All committees using MERTS Plus must download the new version of the software to avoid filing issues and potential confusion when seeking assistance. Downloading the newer version of the software will not cause any loss of data in existing files. However, it is recommended that a back-up copy of the committee file (.DCF) be created and saved prior to downloading the newer version.

An updated version of the MERTS Plus software is now available at the www.mertsplus.com Web site for Candidate Committees, Political and Independent Committees (PACs), Ballot Question Committees and Political Party Committees.

The new version of MERTS Plus affords greater usability and flexibility over the previous version of MERTS Plus as described below:

New Set-up Wizard and Hyperlinks Within the Software

With the updated version of MERTS Plus, a new committee is now prompted through all of the steps needed to set-up committee files. After the committee set-up process is completed, the wizard will prompt the committee to begin entering receipts and expenditures.

Each time the software is launched, the filer will be given the option to open an existing committee or create a new committee using the Wizard. Software users will no longer encounter blank screens in the software. See example below.



To further assist filers, hyperlinks have been placed throughout the software. The example below shows a link to the Elections Cycle dates within the Election Cycles data entry screen.



Redesign of the Summary Page/Data Entry Window

The updated version of MERTS Plus makes it easier to access the transaction screens. A new column has been added to the window highlighting how to begin adding transactions. The window itself has been grey barred (alternating rows of white and grey) to provide for easier distinction between the rows.

Line#	Dbl Click To	Description	This Period	Cumulative
3.	Add New	Contributions		
		....a.Itemized (Schedule 1A - Column 6)	1500.12	1500.12
		....b.Unitemized (less than \$20.01 each - no Schedule)		
4.	Add New	Other Receipts (Schedule 1A - 1: Column 6)	4205.25	4505.25
6.	Add New	In-Kind Contributions (Schedule 1-1K: Column 7)	1710.00	1710.00
7.	Add New	In-Kind Expenditures (Schedule 1B-1K: Column 6)	75.00	75.00
8.	Add New	Expenditures	1453.00	1453.00
		....a.Itemized (Schedule 1B - Column 6)	1125.00	
	Add New	....b.Itemized Get-Out-the-Vote (Schedule 1B-G)	328.00	328.00
		....c.Unitemized (less than \$50.01 each - no Schedule)		
10.	Add New	Disbursements (Officeholder Expenses Only)	300.00	300.00
		....a.Itemized (Schedule 1C - Column 6)	300.00	
		....b.Unitemized (less than \$50.01 each - no Schedule)		
12.a	Add New	Loans Owed BY the Committee (Schedule 1E - Funds Deposited or In-Kind)	4400.00	
12.b	Add New	Debts Owed TO the Committee (Schedule 1E - Receipts owed to the committee)		
12.a	Add New	Debts Owed BY the Committee (Schedule 1E - Invoices to be Paid)		
12.a		Total payments towards the loans and debts owed BY the Committee	1275.00	
12.b		Total refund received for the debts owed TO the Committee		

Redesign of the All Transactions Window

The updated version of MERTS Plus color codes the transactions so the transaction types can be easily identified:

- Green: Contributions
- Red: Expenditures
- Yellow: Fundraisers
- Blue: Loans/Debts

CC	Line#	Name	Description	Date	Amount	Id	Dbl Click for Fund...
●	3	MICPAC	contribution	11/07/2003	300.00	4289	F-4288
●	3	Ameripac	contribution	11/07/2003	200.00	4291	F-4288
●	8.	Arrowswift Printing	expenditure	11/11/2003	27.54	4376	
●	3	MI Harness Horsemen's As	contribution	11/18/2003	125.00	4293	F-4288
●	8.	Arrowswift Printing	expenditure	11/24/2003	258.75	4378	
●	F	Governor's Room	Fundraiser	12/10/2003		4288	
●	3	Delta PAC	contribution	12/20/2003	125.00	4294	F-4288
●	3	Lentine, Manuel	contribution	01/09/2004	125.00	4356	
●	3	Citizens to Elect Ed Gaffney	contribution	01/09/2004	100.00	4359	
●	3	MI Assoc of Insurance Age	contribution	01/09/2004	125.00	4361	
●	3	GM PAC	contribution	01/09/2004	150.00	4365	
●	3	Pharmacy Action Council	contribution	01/09/2004	125.00	4367	
●	8.	Comte to Elect Mickey Mor	expenditure	01/22/2004	100.00	4389	
●	8.	All About Memories	expenditure	01/24/2004	100.00	4296	
●	3	Voorhees, Joanne	contribution	02/03/2004	100.00	4372	
●	3	Karoub Associates PAC	contribution	02/04/2004	125.00	4362	
●	8.	Campbell Catering	expenditure	02/08/2004	380.64	4302	F-4288
●	3	Brandenburg, John	contribution	02/09/2004	100.00	4368	

The window itself has also been grey barred to provide for easier distinction between the transactions. Fundraiser receipts and expenditures are linked to the fundraiser for easier updating of the records. Transactions can still be sorted in a variety of ways as none of the previous features have been removed from the All Transactions window.

Validator Links to Transactions for Review or Update

The updated version of MERTS Plus provides a link from the validator to the Transaction ID for easier updates to the committee data.

Fatal Level Errors (F)

Record Name	Field Name	Field Data	Reason	Transaction ID	Hint
1A	Occupation		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Employer		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Employer Address1		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Employer City		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Employer State		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Employer Zip code		Required field	4112	Contributor Name(LINCOLN BLOCK CLUB^^^) Received Date(20070302)
1A	Occupation		Required field	4114	Contributor Name(SMITH^^JANE^^) Received Date(20070303)

Statutory Warning Possible Michigan Campaign Finance Act Requirement (MCFA)

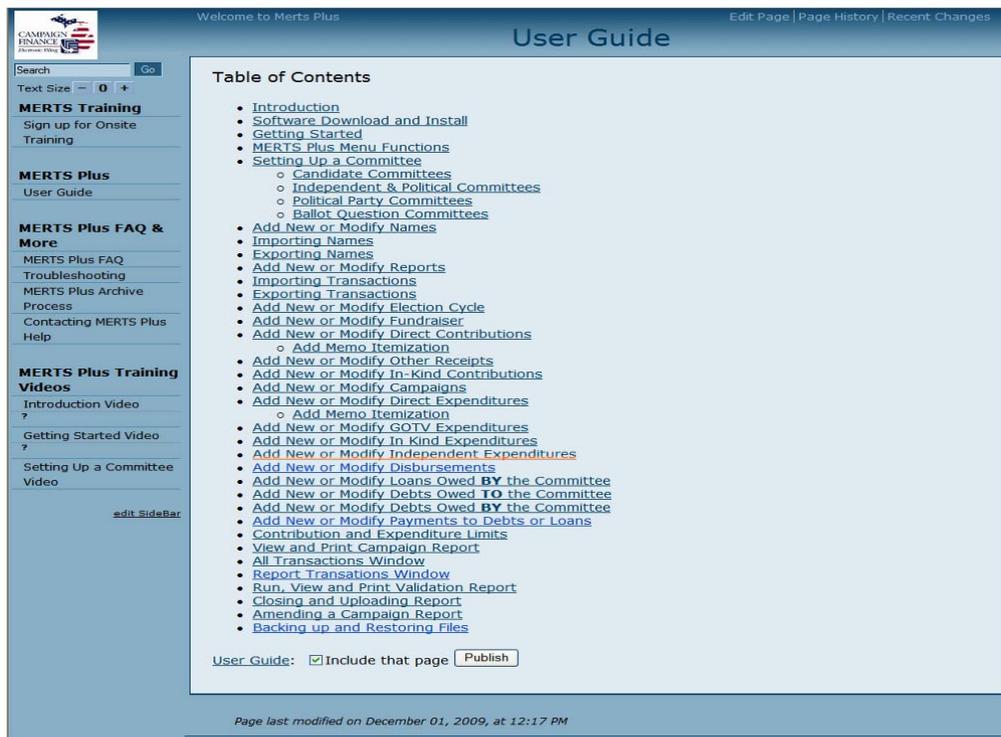
Enhanced Report Viewing and Printing

The updated version of MERTS Plus enhances the flexibility of the print options. Most of the pages will now print over fifteen transactions per page.

<input checked="" type="checkbox"/> Cover Page	CANDIDATE COMMITTEE COVER PAGE	
<input type="checkbox"/> Summary Page	• Committee ID	111222-0
<input type="checkbox"/> Contributions (1A)	• Committee Name	JANE SMITH FOR HOUSE
<input type="checkbox"/> Other Receipts (1A-1)	• Coverage Period	10/21/2007 - 11/25/2007
<input type="checkbox"/> In-Kind Contributions (1-1K)	• Candidate Name	JANE SMITH
<input type="checkbox"/> Direct Expenditures (1B)	• Office/District Sought	State Representative
<input type="checkbox"/> In-Kind Expenditures (1B-1K)	• County of Residence	INGHAM
<input type="checkbox"/> GOTV Expenditures (1B-G)	• Address Information	
<input type="checkbox"/> Office Disbursements (1C)	• Committee Mailing	132 MAIN STREET STE 4 LANSING MI 40000-0000
<input type="checkbox"/> Debts and Obligations (1E)	• Phone	
<input type="checkbox"/> Fund Raisers (1F)	• Treasurer Name	MARY ADAMS
<input type="checkbox"/> Print selected schedules	• Treasurer Residential	234 RAINBOW ROAD STERLING HEIGHTS MI 40123
	• Phone	
	• Treasurer Business	
	• Phone	
	• Recordkeeper Name	
	• Recordkeeper Mailing	
	• Phone	
	• Statement Type	Post-Election
	• Relates To	General
	• Election Date	11/05/2007
	• Dissolution Date (effective)	//

Enhanced Multi-Media Training and User Information Provided on the Web

New updated versions of the online training and user guides have been developed. On the MERTS Plus Web site you will find updates including links to resources on the Department of State's Web site.



Welcome to Merts Plus Edit Page | Page History | Recent Changes

User Guide

Search

Text Size: 0

MERTS Training
Sign up for Onsite Training

MERTS Plus
User Guide

MERTS Plus FAQ & More
MERTS Plus FAQ
Troubleshooting
MERTS Plus Archive
Process
Contacting MERTS Plus
Help

MERTS Plus Training Videos
Introduction Video
Getting Started Video
Setting up a Committee Video
[edit sidebar](#)

Table of Contents

- [Introduction](#)
- [Software Download and Install](#)
- [Getting Started](#)
- [MERTS Plus Menu Functions](#)
- [Setting Up a Committee](#)
 - [Candidate Committees](#)
 - [Independent & Political Committees](#)
 - [Political Party Committees](#)
 - [Ballot Question Committees](#)
- [Add New or Modify Names](#)
- [Importing Names](#)
- [Exporting Names](#)
- [Add New or Modify Reports](#)
- [Importing Transactions](#)
- [Exporting Transactions](#)
- [Add New or Modify Election Cycle](#)
- [Add New or Modify Fundraiser](#)
- [Add New or Modify Direct Contributions](#)
 - [Add Memo Itemization](#)
- [Add New or Modify Other Receipts](#)
- [Add New or Modify In-Kind Contributions](#)
- [Add New or Modify Campaigns](#)
- [Add New or Modify Direct Expenditures](#)
 - [Add Memo Itemization](#)
- [Add New or Modify GOTV Expenditures](#)
- [Add New or Modify In-Kind Expenditures](#)
- [Add New or Modify Independent Expenditures](#)
- [Add New or Modify Disbursements](#)
- [Add New or Modify Loans Owed **BY** the Committee](#)
- [Add New or Modify Debts Owed **TO** the Committee](#)
- [Add New or Modify Debts Owed **BY** the Committee](#)
- [Add New or Modify Payments to Debts or Loans](#)
- [Contribution and Expenditure Limits](#)
- [View and Print Campaign Report](#)
 - [All Transactions Window](#)
 - [Report Transactions Window](#)
 - [Run, View and Print Validation Report](#)
 - [Closing and Uploading Report](#)
 - [Amending a Campaign Report](#)
 - [Backing up and Restoring Files](#)

User Guide: Include that page

Page last modified on December 01, 2009, at 12:17 PM

Obtaining the Software

Please refer to the enclosed loading instructions to obtain the appropriate updated software for your committee. All committees using MERTS Plus must download the new version of the software to avoid filing issues and potential confusion when seeking assistance. Downloading the newer version will not cause any loss of data in existing files. However, it is recommended that a back-up copy of the committee file (.DCF) be created and saved prior to downloading the newer version.

Questions Concerning the Use of MERTS Plus

MERTS Plus Technical Support may be contacted for questions concerning the procedures for downloading and using the software:

MERTS Plus Technical Support
Telephone: (703) 749-4642
E-mail: mertstechsupport@nicusa.com
MERTS Plus Web site: www.mertsplus.com

Questions Concerning the Campaign Finance Act

Please feel free to contact the Michigan Department of State's Bureau of Elections for assistance or questions concerning the Michigan Campaign Finance Act:

Michigan Department of State
Bureau of Elections
Telephone: (517) 373-2540
E-mail: disclosure@michigan.gov
Web site: www.michigan.gov/sos

For U.S. Mail:

Post Office Box 20126
Lansing, Michigan 48901-0726

For overnight delivery services, or to visit our office:

Richard H. Austin Building, 430 West Allegan – 1st Floor
Lansing, MI 48933

Attachment: Downloading Instructions