crimson

JFC Contributions and Distributions

JFC Setup

Please contact Customer Support if you are interested in using the JFC Module. Preliminary setup steps with assistance from CMDI are required.

- Set Allocation Calculations – These will be determined by the Joint Fundraising Agreement.
- Account for Any Deviations – Specify any special case scenarios (like for state requirements).
- Programming – CMDI Programmers will setup JFC Module allocation settings with above specifications.

Recording JFC Contributions

If the Fund Code entered for a new contribution matches a JFC that is setup in Crimson, the allocation calculations will happen automatically. The money record detail page will show a [⊕ JFC] tab which displays three sections reflecting how the contribution is allocated and distributed among the JFC participants.
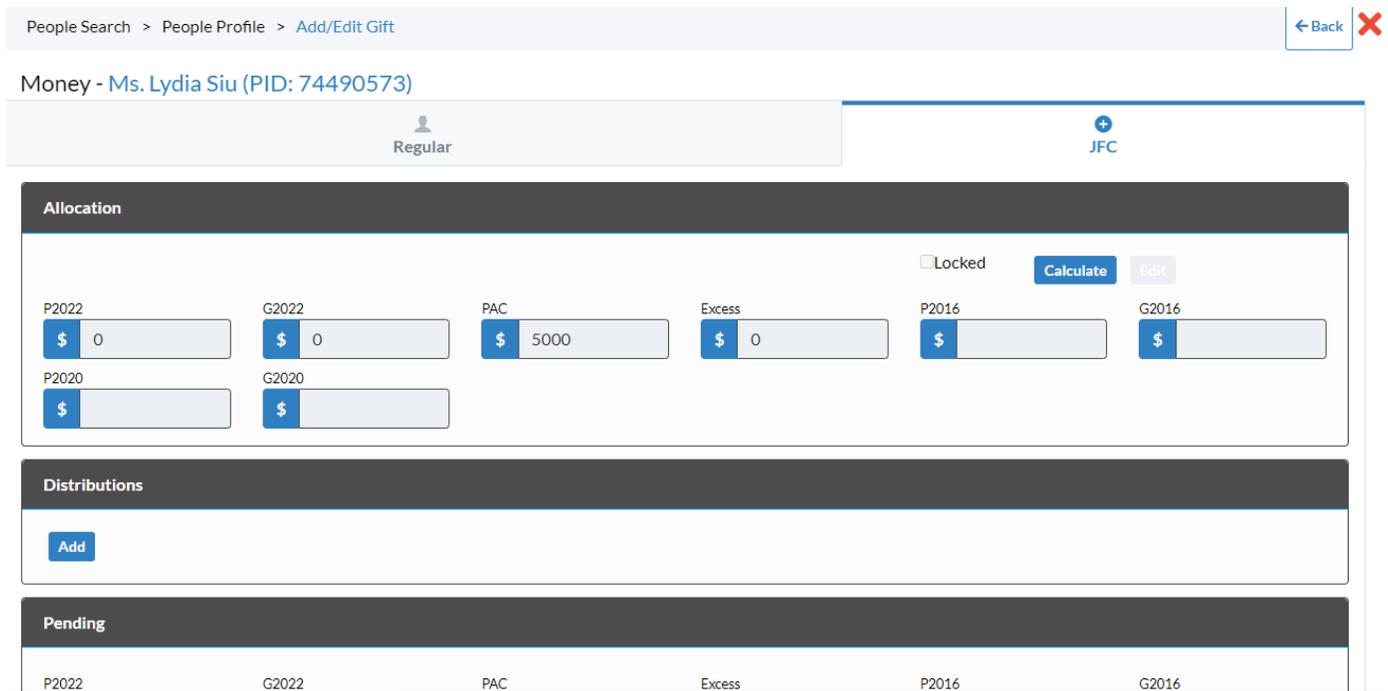
People Search > People Profile > Add/Edit Gift   ← Back ✕

Money - Ms. Lydia Siu (PID: 74490573)

👤 Regular	⊕ JFC

Allocation

☐ Locked   [Calculate]   [Edit]

P2022	G2022	PAC	Excess	P2016	G2016
$ 0	$ 0	$ 5000	$ 0	$	$

P2020	G2020
$	$

Distributions

[Add]

Pending

P2022	G2022	PAC	Excess	P2016	G2016

Allocation – This section reflects how a contribution should be divided among JFC participants. It can be changed if new information becomes available about the amount that each participant can accept from the donor or if a donor specifies how a contribution should be allocated.

- Users can change how the contribution will be divided by using **Edit** icon in the Allocation section.
- The **Calculate** button will recalculate allocations according to the formula for that JFC.
- The **Locked** checkbox will prevent a contribution from being automatically recalculated.
- If any of the JFC participants are in the same database, Crimson will check to see how much a donor can contribute to that participant and still remain within contribution limits.
- The amount in the Excess box represents money remaining after allowable allocations are made.

Distributions – This section reflects transfer payments that have been made to participant committees that include this contribution. Changes should *not* be made to reflect what *should* have happened. Each distribution record should reflect what actually occurred. Corrections can be made on subsequent distributions.

- An [Add] distribution button is available for a single gift distribution. This is rare. The Distributions section in Treasury typically handles the selection of records and calculation of amounts for a distribution.

Pending – This section shows the calculation of amounts to be included when this transaction is selected for a distribution.

- o There could be negative numbers in the pending fields if corrected allocation amounts minus any previous distributions equals a negative amount. That correction will be handled in the next distribution.

Distributions to JFC Participants

When JFC clients choose to distribute funds to the committee participants, it is necessary to identify and record which contributions are part of the distribution. . A record of processed distributions is available on the **JFC Dashboard** via the **Distribution Search**.

Each Distribution Header identifies the number of contributions included and the total dollar amount. A Status of Pending would indicate that a distribution is still in process.

Distribution

	Distribution Id	Distribution No	Distribution Date	Fund Code	Total #	Total Amount	
✏ ✕	180	0001	8/27/20	RV	1	$800	Cor
✏ ✕	176	0009	7/30/20	RV	4	$80,000	Cor
✏ ✕	133	0216	2/25/16	RV	9	$45,900	Cor
✏ ✕	152	0323	3/23/18	RV	127	$901,800	Cor
✏ ✕	165	0528	5/28/19	RV	37	$319,700	Cor
✏ ✕	147	0601	6/1/17	RV	16	$117,850	Cor

Creating a New Distribution

Click **Add new Distribution** to select the records that will be included in the distribution. Crimson gives users the ability to include or exclude categories of contributions. For example, contribution date ranges that end several days prior to the distribution date are recommended. This allows time for checks to clear and for record merges and a review of exception situations to occur. Crimson also allows you to only distribute the portions of a gift attributed to a specific participant. For example, if a JFC was made of your campaign and LPAC, you could distribute only the LPAC portions of the gift and save the campaign portions for a future distribution.

Use the Suppression options to exclude contributions from the distribution. For example, excluding contributions with pending exception codes is typical.

Once your selection criteria are entered, click **Run**. A list of contributions that match that criteria is displayed. Clicking ✎ will take you to a that money record for review or edit.

New Distribution "

		Tran Id	Donor Id	Type	Prefix	First	Middle	Last	
Filters					**Output Fields**			**Result**	
✎		59286	74161834	P		Sandy		Fertitta	
✎		60743	74000389	I	Mrs.	June	Ann	Dey	
✎		60786	74000026	I	Ms.	Susan	E.	Hughes	
✎		60787	74001619	I	Ms.	Sylvia	Marie	Parsons	
✎		60790	74178434	P				National Confectioners Association PAC	
✎		60792	74178558	P				Computers For Africa PAC	
✎		60793	74000389	I	Mrs.	June	Ann	Dey	

184 records | Export | ☰ ▲ | | | | | Save | Saved Searches | Recent Searches ▲ | Reset | Run

To review all contributions in Excel, click **Export**. This list can be used for participant vetting to determine whether each committee can accept the amount shown for each donor. When satisfied with the list, click ☰ ▲ then select **Create New Distribution**.

New Distribution > Create Distribution   ← Back ✕

Are you sure to create Distribution?

Distribution No
[   ]
Date
[11/23/2022   📅]
Fund
[⌄]
Comment
[   ]

Yes   No

- Enter the Distribution Header information:
  - **Distribution No** – Clients may determine the numbering scheme.
  - **Distribution Date** – This will be your reporting date, and should match the date payments to participants are made.
  - **Fund Code** – The fund code of the JFC that is making this distribution.
  - **Comment** – Descriptive notes about the distribution, if applicable.
  - Click **Yes** when done

JFC Distribution Review and Completion

To review and finalize a distribution go back to the Distributions menu and search for it. Click the [pencil] button to open the details.

Distribution   ✕

Header

Distribution No

0001

Date

8/27/2020   📅

Fund

RV - Victory

Comment

Distribution Totals

Committee	Amount
P2020	$800

« ‹ **1** › » | 10 ˅ items per page | 1-1 of 1 items

Summary

# included	1
Contribution	$800.00
Distribution	$800.00
Difference	$0.00
Partners	$0.00
In-Kinds	$0.00

Status : Completed   **View Detail**

Transaction Links

P2022	G2022	PAC	P2016
Tran# [pencil] +	Tran# [pencil] +	Tran# [pencil] +	Tran# [pencil] +

G2016	P2020	G2020
Tran# [pencil] +	Tran# [pencil] +	Tran# [pencil] +

The **View Detail** button will provide a list of included contributions that can be exported into Excel. The distribution will have a status of Pending until the **Complete Distribution** button is clicked. At that time, the details of the distribution will be added to each of the money records included. Until a Distribution is completed, it can be reviewed, edited or deleted.

Recording JFC Distributions Received by Participants in the Database

Clients who host JFC Participants in the same database as the JFC should create a money record for the net transfer amount received by the participant committee so that the campaign's account balances and FEC Report reflect the transfer. NOTE: **Payment Type must = JF – Joint fundraising**. To save time, use the [+] on the **Distribution** detail page to add the payment record.

Gift

Transaction Id#
596091

Batch #
162

Batch Date
9/29/2022

Gift Type
RG - Regular

Amount
$ 100

Chapter
1120 - Donor Development

Fund
RV - Victory

Revenue
N/A - N/A

Project/Event
N/A - N/A

Channel
Unspecified

Source Code ➕
HCR1 - This was sent out to Hamilton County GOP ✖

Initiative
HCBS1 - Bumper stickers promoting healthcare sent out
Program
PROS - Prospecting

Payment

Payment Type
JF - Joint Fundraising Committee

Check / Card Number

Card Exp Date (mm/yy)

Approval Code

CC Transaction Id

Received Date

Comment

Reference Id#

Exception

Exception Code
- - n/a

Exception Date

JFC Exception Code

☐ Soft Credit ☐ Recurred

Linking JFC Distribution Transfer Receipt to the Distribution Details

If a participating committee is hosted in the same database, and a money record has been created with the net amount of the distribution received, that transaction should be linked to the distribution. This allows CrimsonFiler to link all memo contribution details related to that receipt when reporting to the FEC. Again, to save time, use the

➕ on the **Distribution** detail page to add the payment record.

Distribution ✖

Header

Distribution No
0001

Date
8/27/2020

Fund
RV - Victory

Comment

Distribution Totals

Committee	Amount
P2020	$800

« ‹ 1 › » 10 ˅ items per page 1-1 of 1 items

Summary

# included	1
Contribution	$800.00
Distribution	$800.00
Difference	$0.00
Partners	$0.00
In-Kinds	$0.00

Status : Completed

[View Detail]

Transaction Links

P2022	G2022	PAC	P2016
Tran# ✏ ➕	Tran# ✏ ➕	Tran# ✏ ➕	Tran# ✏ ➕

G2016	P2020	G2020	
Tran# ✏ ➕	Tran# ✏ ➕	Tran# ✏ ➕	

JFC Coding

JFC's present unique situations that can be coded in Crimson for special handling.   These codes are recorded in the Exception section of a Money record.

Exception

Exception Code

A1 - Presumptive Reattribution Letter Needed ▾

Exception Date

05/31/2019 🗓

JFC Exception Code

DD - Delay Distribution ▾

☐ Soft Credit ☐ Recurred

JFC Codes – Use to indicate unique distribution requests

- **AR** = Allocation Request – If a donor specified how their donation is to be allocated (does not follow standard formula), use this code to indicate that a manual, atypical allocation is needed.

- **NA** = This is the default code when no JFC Code is used.

- **DD** = Used to identify contributions to exclude in the Distribution selection process under Suppression. These contributions typically have a compliance issue to be resolved prior to distributing funds to participant committees. For example, if you're waiting for a partnership attribution before distributing the partnership gift.