TEXAS ETHICS COMMISSION

JUDICIAL CANDIDATE/OFFICEHOLDER SPECIAL SESSION REPORT

FORM JC/OH-SS – INSTRUCTION GUIDE

Revised January 1, 2025

Texas Ethics Commission, P.O. Box 12070, Austin, Texas 78711
(512) 463-5800 FAX (512) 463-5777 TDD 1-800-735-2989

Visit us at *http://www.ethics.state.tx.us* on the Internet..

FORM JC/OH-SS: CANDIDATE/OFFICEHOLDER SPECIAL SESSION REPORT

GENERAL INFORMATION

These instructions are for the JUDICIAL CANDIDATE/OFFICEHOLDER SPECIAL SESSION REPORT (Form JC/OH-SS). A complete report includes the Form JC/OH-SS Cover Sheet, and any of the following schedules on which there is information to report: A(J)1, A2-SS, B(J)-SS, and T.

This report is filed after the end of a special legislative session called by the governor. All statewide (including judicial) candidates and officeholders, and members of and candidates for the legislature, who accept contributions during the time period covered by the special session report are required to file a special session report. The report must be filed no later than 30 days after the date of final adjournment and must cover the period beginning on the date the governor signs the proclamation calling the special session and ending on the date of final adjournment of the special session.

Please also note that a judge, judicial candidate, or judicial specific-purpose committee may accept a political contribution only during a specified period. For additional information, please see the "Campaign Finance Guide for Judicial Candidates and Officeholders" on the Texas Ethics Commission (Commission) website at https://www.ethics.state.tx.us/main/guides.htm.

If you do not accept any contributions during the time period covered by the special session report, you are not required to file the report. *This is an exception from the usual rule that you must file a report even if you have no activity to report*.

A Special Session report is a report of contributions only, not expenditures. Contributions reported on a special session report must be reported again on your next regular report. (Don't worry; the filing application will automatically copy contributions from any Special Session report you file into your next required report.) In addition, you must include on your next regular report any expenditures that occurred during the period covered by the special session report.

You are not required to file a separate special session report if another report is due no later than the 10th day after the date on which the special session report would be due.

Officeholder Activity. An officeholder may make officeholder expenditures and accept officeholder contributions without having a campaign treasurer appointment on file. However, an officeholder must have a campaign treasurer appointment on file before the officeholder may make campaign expenditures or accept campaign contributions.

COMPLETING THE COVER SHEET

Each numbered item in these instructions corresponds to the same numbered item on the form.

PAGE 1

1. **FILER ID**: You were assigned a filer identification number when you filed your initial campaign treasurer appointment. You should have received a letter acknowledging receipt of the form and informing you of your Filer ID. Enter this number wherever you see “FILER ID.”

2. **TOTAL PAGES FILED**: After you have completed the form, count the total number of pages of this form and any attached schedules. Enter that number where indicated on the top line of Page 1 only. Each side of a two-sided form counts as one page.

3. **CANDIDATE/OFFICEHOLDER NAME**: Enter your full name, including nicknames and suffixes (e.g., Sr., Jr., III), if applicable.

4. **CANDIDATE/OFFICEHOLDER ADDRESS**: Enter your complete mailing address. If your mailing address has changed since you last gave notice of your address, check the “Change of Address” box.

5. **PERIOD COVERED**: The start date is the day the governor signs the proclamation calling the special legislative session. The end date is the day of final adjournment of the special legislative session.

   Contributions reported on a special session report must be reported again on your next report. Expenditures that occur during the period covered by the special session report are not included on the special session report, but must be included on your next report.

   You are not required to file a separate special session report if another report is due no later than the 10th day after the date on which the special session report would be due.

6. **OFFICE HELD**: If you are an officeholder, please enter the office you currently hold. Include the district, precinct, or other designation of the office, if applicable.

7. **OFFICE SOUGHT**: If you are a candidate in an upcoming election, please enter the office you seek. Include the district, precinct, or other designation of the office, if applicable.

8. **SIGNATURE:** Complete this section only after you have completed all applicable sections and schedules. You must always sign a report that you file. You must complete this section even if you have no schedules to attach.

   If you are using the paper form, fill this section out by hand after you finish the rest of this report. You have the option to either: (1) take the completed form to a notary public where you will sign above the first line that says “Signature of Candidate or Officeholder” (an electronic signature is not acceptable) and your signature will be notarized, or (2) sign both lines that say “Signature of Candidate or Officeholder” (an electronic signature is not acceptable), and fill out the unsworn declaration section.

SCHEDULE A(J)1: MONETARY POLITICAL CONTRIBUTIONS (JUDICIAL)

These instructions are for judicial candidates and officeholders using SCHEDULE A(J)1: MONETARY POLITICAL CONTRIBUTIONS (JUDICIAL).

Use this schedule to disclose information about monetary campaign and officeholder contributions accepted during the reporting period covered by the special session report. Do not enter on this schedule information on non-monetary (in-kind) political contributions or pledges. (Report non-monetary, in-kind political contributions on Schedule A2-SS and pledges on Schedule B(J)-SS.)

Itemization: You are required to itemize all contributions accepted during a special legislative session, regardless of the amount. If you accepted two or more contributions from the same contributor, enter each contribution separately.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. **TOTAL PAGES SCHEDULE A(J)1**: After you have completed Schedule A1, count the total number of pages. Each side of a two-sided form counts as one page.

2. **FILER NAME**: Enter your full name.

3. **FILER ID**: See instructions for Cover Sheet, page 1, section 1.

4. **DATE**: Enter the date you ***accepted*** the contribution. A decision to accept a contribution received during the period covered by a special session report must be made by the third day after the contribution is received.

   Accepting a contribution is different from ***receiving*** a contribution. You accept a contribution when you decide to accept it rather than reject it. This may or may not be the same day that you receive the contribution.

   > <u>Failure to make a determination about acceptance or refusal:</u> If you fail to make a determination to accept or refuse a contribution by the end of the reporting period, the contribution is considered to have been accepted.
   >
   > <u>Returning refused contributions:</u> If you receive a political contribution but do not accept it, you must return the contribution not later than the 30th day after the end of the reporting period in which the contribution was received. If you fail to do so, the contribution is considered to have been accepted.

5. **FULL NAME OF CONTRIBUTOR**: Enter the full name of the contributor. If the contributor is an individual, enter the full first and last name, and suffix (Jr., III, etc.) if applicable. If the contributor is an entity, enter the full name of the entity.

   Note: For Special Legislative Session Reports, you are not required to disclose the following information for a contributor that is an out-of-state political committee; however, you will be required to do so when that same contribution is disclosed again on the next required report.

For this reason, you may choose to disclose the information now. Otherwise, you will need to remember to add the information later before you file the next required report.

"Out-of-State PAC" box: If the contributor is an out-of-state political committee, check the box. Certain restrictions apply to contributions from out-of-state PACS. The fact that a political committee has a mailing address outside of Texas does not mean that the committee is an out-of-state PAC for purposes of these restrictions. A political committee that has a campaign treasurer appointment on file in Texas is not an out-of-state PAC. A political committee that makes most of its political expenditures outside of Texas may be an out-of-state PAC. A political committee must determine if it is an out-of-state PAC.

If the contributor is an out-of-state political committee from which you accepted more than $1,110 during the reporting period covered by the special session report (including pledges or loans from sources other than financial institutions that have been in business for more than a year), you must include one of the following with your report:

- a written statement, certified by an officer of the out-of-state political committee, listing the full name and address of each person who contributed more than $220 to the out-of-state political committee during the 12 months immediately preceding the contribution; ***or***

- a copy of the out-of-state political committee's statement of organization filed as required by law with the FEC and certified by an officer of the out-of-state committee.

If the contributor is an out-of-state political committee from which you accepted $1,110 or less (including pledges) during the reporting period, you must include one of the following with your report:

- a copy of the out-of-state political committee's statement of organization filed as required by law with the FEC and certified by an officer of the out-of-state committee; ***or***

- a document listing the committee's name, address and phone number; the name of the person appointing the committee's campaign treasurer; and the name, address and phone number of the committee's campaign treasurer.

"ID #" Line (Electronic Filing Only): If you are filing your report electronically, you may enter in this field the out-of-state committee's Federal Election Commission (FEC) identification number. If you do not have an FEC # for the out-of-state PAC or are not filing electronically with the Commission, you must provide other documentation as explained above.

6. **CONTRIBUTOR ADDRESS**: Enter the complete address of the contributor.

7. **AMOUNT OF CONTRIBUTION**: Enter the amount of the contribution.

8. **CONTRIBUTOR'S PRINCIPAL OCCUPATION**: You may enter the principal occupation of the contributor.

9. **CONTRIBUTOR'S JOB TITLE**: You may enter the job title of the contributor.

10. **CONTRIBUTOR'S EMPLOYER/LAW FIRM**: You may enter the name of the contributor's employer, or if the contributor is a "member" of a law firm, enter the name of the law firm. "Members" of a law firm include any partner, associate, shareholder, or employee of a law firm, and any person designated "of counsel" to the firm or "of the firm."

11. **LAW FIRM OF CONTRIBUTOR'S SPOUSE (IF ANY):** If the contributor's spouse is a "member" of a law firm as defined in section 10, you may enter the name of that law firm here.

12. **IF CONTRIBUTOR IS A CHILD, LAW FIRM OF PARENT(S) (IF ANY):** If the contributor is a child, you may enter the name of any law firm of which either of the child's parents is a "member" as defined in section 10.

    Note: For Special Legislative Session reports, you are not required to disclose information in sections 8-12 for a contributor; however, you will be required to do so when that same contribution is itemized again on the next required report. For this reason, you may choose to disclose the information now. Otherwise, you will need to remember to add the information later before you file the next required report.

SCHEDULE A2-SS: NON-MONETARY (IN-KIND) POLITICAL CONTRIBUTIONS

These instructions are for candidates and officeholders using SCHEDULE A2-SS: NON-MONETARY (IN-KIND) POLITICAL CONTRIBUTIONS.

Use this schedule to disclose information about non-monetary, in-kind campaign and officeholder contributions received during the reporting period. An in-kind contribution is a contribution of goods, services, or any other thing of value ***other than money*** that is given to your campaign. You are not required to include contributions of an individual's personal services or travel if the individual receives no compensation from any source for the services. Once you actually receive a pledged in-kind contribution, it must be reported on Schedule A2-SS. Do not enter on this schedule information on monetary political contributions or pledges. (Report monetary political contributions on Schedule A(J)1 and pledges on Schedule B(J)-SS.)

Itemization: You are required to itemize all non-monetary (in-kind) political contributions accepted during a special legislative session, regardless of the amount. If you accepted two or more contributions from the same contributor, enter each contribution separately.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. **TOTAL PAGES SCHEDULE A2-SS:** After you have completed Schedule A2-SS, count the total number of pages. Each side of a two-sided form counts as one page.

2. **FILER NAME:** Enter your full name.

3. **FILER ID:** See instructions for Cover Sheet, page 1, section 1.

4. **DATE:** See instructions for Schedule A(J)1, section 4.

5. **FULL NAME OF CONTRIBUTOR:** See the instructions for Schedule A(J)1, section 5.

   "Out-of-State PAC" box: See instructions for Schedule A(J)1, section 5.

6. **CONTRIBUTOR ADDRESS:** Enter the complete address of the contributor.

7. **AMOUNT OF CONTRIBUTION:** Enter the fair market value of the in-kind contribution.

8. **IN-KIND CONTRIBUTION DESCRIPTION:** Enter a description of the in-kind contribution. The description should be sufficiently detailed to allow a person reviewing your report to understand what goods or services were contributed.

   "Travel Outside of Texas" box: If the in-kind contribution was for travel outside of Texas, please check the box and report this information on Schedule T.

Sections 9-10 pertain to non-judicial candidates and officeholders only. Do not complete these sections. If you are a non-judicial candidate or officeholder, please use form C/OH-SS and the corresponding instructions.

11. **CONTRIBUTOR'S PRINCIPAL OCCUPATION (FOR JUDICIAL):** See the instructions for Schedule A(J)1, section 8.

12. **CONTRIBUTOR'S JOB TITLE (FOR JUDICIAL):** See the instructions for Schedule A(J)1, section 9.

13. **CONTRIBUTOR'S EMPLOYER/LAW FIRM (FOR JUDICIAL):** See the instructions for Schedule A(J)1, section 10.

14. **LAW FIRM OF CONTRIBUTOR'S SPOUSE (IF ANY) (FOR JUDICIAL)**: See the instructions for Schedule A(J)1, section 11.

15. **IF CONTRIBUTOR IS A CHILD, LAW FIRM OF PARENT(S) (IF ANY) (FOR JUDICIAL):** See the instructions for Schedule A(J)1, section 12.

SCHEDULE B(J)-SS: PLEDGED CONTRIBUTIONS (JUDICIAL)

These instructions are for judicial candidates and officeholders using SCHEDULE B(J)-SS: PLEDGED CONTRIBUTIONS (JUDICIAL).

Use this schedule to disclose information about pledges accepted during the reporting period for campaign or officeholder purposes. You are not required to include pledges of an individual's personal services or travel if the individual receives no compensation from any source for the services. Do not enter on this schedule information on contributions actually received. (Report monetary contributions actually received on Schedule A(J)1 and non-monetary contributions actually received on Schedule A2-SS.)

If you accept a pledge from a person to give you money, goods, services, or anything of value, that pledge is a reportable contribution and you must include the pledge on this schedule for the report covering the period in which you accept the pledge.

Itemization: You must itemize all pledges accepted during the special legislative session, regardless of the amount, on this schedule.

Note: See the Campaign Finance Guide for more information on pledges.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. **TOTAL PAGES SCHEDULE B(J)-SS**: After you have completed Schedule B(J)-SS, count the total number of pages. Each side of a two-sided form counts as one page.

2. **FILER NAME**: Enter your full name.

3. **FILER ID:** See instructions for Cover Sheet, page 1, section 1.

4. **DATE**: Enter the date you **accepted** the pledge. Accepting a pledge is different from receiving a contribution. You accept a pledge when you decide to accept it rather than reject it.

   Pledge accepted and received in different reporting periods: If you accept a pledge in one reporting period and then receive the pledged money or other thing of value in a later reporting period, you will disclose the pledge on this schedule in the reporting period in which you accepted the pledge. You will also disclose the receipt of the pledged money or other thing of value on the appropriate incoming funds schedule (such as monetary or non-monetary contributions, or loans) in the reporting period in which you received the pledge.

   Pledge received in same reporting period as accepted: If you receive a pledge in the same reporting period in which it was accepted, then you will not report the pledge on this schedule. You will only disclose the contribution on the appropriate incoming funds schedule (such as monetary or non-monetary contributions, or loans). The date of the contribution will be the date you accepted the pledged contribution, regardless of when the pledged contribution was actually received.

Pledge accepted but never received: You will disclose the pledge on this schedule in the reporting period in which you accepted the pledge. If you never actually receive the pledge, it is not necessary to correct your report to delete the pledge.

Example: On June 26, during a special legislative session, a supporter promises that he will give Juan Garcia $1,000 in the last week of November. Juan accepts his promise. The special session adjourns on July 25 and the special session report is due on August 24. Juan must disclose the pledge on his special session report and the July 15 report, because both reports cover the period in which he accepted the pledge. (Note: When he receives the $1,000, he will disclose it as a monetary contribution on Schedule A(J)1 of the report covering the period in which he received the money. Also, if he never receives the $1,000, he does not correct/amend his report to delete the entry for the pledge.)

5. **FULL NAME OF PLEDGOR**: Enter the full name of the person who made the pledge.

   "Out-of-State PAC" box: See the instructions for Schedule A(J)1, section 5.

   Note: See the Campaign Finance Guide for detailed information on accepting and reporting contributions from out-of-state political committees.

6. **PLEDGOR ADDRESS**: Enter the complete address of the person who made the pledge.

7. **AMOUNT OF PLEDGE**: Enter the amount of the pledge or the fair market value of the pledged goods or services or other thing of value, as applicable.

8. **IN-KIND DESCRIPTION**: If the pledge was for goods or services or any other thing of value, enter a description of the in-kind pledge of goods or services or other thing of value. The description should be sufficiently detailed to allow a person reviewing your report to understand what goods or services were pledged.

   "Travel Outside of Texas" box: If the pledged contribution was an in-kind contribution for travel outside of Texas, please check the box and report this information in Schedule T.

9. **PLEDGOR'S PRINCIPAL OCCUPATION**: See instructions for Schedule A(J)1, section 8.

10. **PLEDGOR'S JOB TITLE**: See instructions for Schedule A(J)1, section 9.

11. **PLEDGOR'S EMPLOYER/LAW FIRM**: See instructions for Schedule A(J)1, section 10.

12. **LAW FIRM OF PLEDGOR'S SPOUSE (IF ANY)**: See instructions for Schedule A(J)1, section 11.

13. **IF PLEDGOR IS A CHILD, LAW FIRM OF PARENT(S) (IF ANY)**: See instructions for Schedule A(J)1, section 12.

SCHEDULE T: IN-KIND CONTRIBUTIONS OR POLITICAL EXPENDITURES FOR TRAVEL OUTSIDE OF TEXAS

These instructions are for candidates, officeholders, committees, or political parties using SCHEDULE T: IN-KIND CONTRIBUTIONS OR POLITICAL EXPENDITURES FOR TRAVEL OUTSIDE OF TEXAS.

Use this schedule to disclose information about contributions accepted or expenditures made for travel outside of the state of Texas during the reporting period. In addition to completing this schedule, you must also report the actual contribution or expenditure on the appropriate schedule or form. The law requires detailed information regarding in-kind contributions or political expenditures for travel outside of the state of Texas.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. **TOTAL PAGES SCHEDULE T**: After you have completed Schedule T, count the total number of pages. Each side of a two-sided form counts as one page.

2. **FILER NAME**: Enter the full name of the candidate, committee, or party on whose report you are including this schedule.

3. **FILER ID**: If you are filing with the Commission, enter your filer identification number. If you do not file with the Commission, you are not required to enter a filer identification number.

4. **NAME OF CONTRIBUTOR / CORPORATION OR LABOR ORGANIZATION / PLEDGOR / PAYEE**: Enter the full name of the contributor / corporation or labor organization / pledgor / payee as it appears on the schedule or form on which you reported the actual contribution or expenditure.

5. **CONTRIBUTION / EXPENDITURE REPORTED ON:** Check the appropriate box for the schedule or form on which you reported the actual contribution or expenditure. For Special Session reports: if you reported contributions on schedules A2-SS, B-SS, or B(J)-SS, check the box of the corresponding schedules A2, B, or B(J), respectively.

6. **DATES OF TRAVEL**: Enter the dates on which the travel occurred.

7. **NAME OF PERSON(S) TRAVELING**: Enter the full name of the person or persons traveling on whose behalf the travel was accepted or on whose behalf the expenditure was made.

8. **DEPARTURE CITY OR NAME OF DEPARTURE LOCATION**: Enter the name of the departure city or the name of each departure location.

9. **DESTINATION CITY OR NAME OF DESTINATION LOCATION**: Enter the name of the destination city or the name of each destination location.

10. **MEANS OF TRANSPORTATION**: Enter the method of travel (e.g. airplane, bus, boat, car, etc.)

11. **PURPOSE OF TRAVEL:** Enter the campaign or officeholder purpose of the travel, including the name of a conference, seminar, or other event.