Reporting Manual
for
Registered Lobbyists

Compiled under the authority of
Ben Ysursa
Secretary of State
State of Idaho

2013
INSTRUCTIONS FOR REGISTERED LOBBYISTS

Introduction

Title 67, Chapter 66, Idaho Code, The “Sunshine Law for Political Funds and Lobbyist Activity Disclosure” requires persons who “lobby” at the state level to register and report regularly with the Secretary of State, unless they meet the exemption tests outlined on page 1.

“Lobby” and “lobbying” each means attempting through contacts with, or causing others to make contact with, members of the legislature or legislative committees or an executive official, to influence the approval, modification or rejection of any legislation by the legislature of the state of Idaho or any committee thereof or by the governor or to develop or maintain relationships with, promote goodwill with, or entertain members of the legislature or executive officials. “Lobby” and “lobbying” shall also mean communicating with an executive official for the purpose of influencing the consideration, amendment, adoption or rejection of any rule or rulemaking as defined in section 67-5201, Idaho Code, or any ratemaking decision, procurement, contract, bid or bid process, financial services agreement, or bond issue. Neither “lobby” nor “lobbying” includes an association’s or other organization’s act of communicating with the members of that association or organization; and provided that neither “lobby” nor “lobbying” includes communicating with an executive official for the purpose of carrying out ongoing negotiations following the award of a bid or a contract, communications involving ongoing legal work and negotiations conducted by and with attorneys for executive agencies, interactions between parties in litigation or other contested matters, or communications among and between members of the legislature and executive officials and their employees, or by state employees while acting in their official capacity or within the course and scope of their employment.

“Lobbyist” includes any person who lobbies.
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Exemptions from Registration

Not every person who lobbies is required to file with the Secretary of State. The following persons are exempt from registering and reporting:

1. Persons who limit their lobbying activities to appearances before public sessions of committees of the legislature or to appearances or participation in public meetings, public hearings or public proceedings held or initiated by executive officials or their employees.

2. Persons who are employees of an entity engaged in the business of publishing, broadcasting or televising, while engaged in the gathering and dissemination of news and comment thereon to the general public in the ordinary course of business.

3. Persons who do not receive any compensation for lobbying and persons whose compensation for lobbying does not exceed two hundred fifty dollars ($250) in the aggregate during any calendar quarter, including persons who lobby on behalf of their employer or employers, and the lobbying activity represents less than the equivalent of two hundred fifty dollars ($250) of the employee’s time per calendar year quarter, based on an hourly proration of said employee’s compensation.

4. Elected state officers and state executive officers appointed by the governor subject to confirmation by the senate; elected officials of political subdivisions of the state of Idaho, acting in their official capacity.

5. A person who represents a bona fide church (of which he is a member) solely for the purpose of protecting the constitutional right to the free exercise of religion.

6. Employees of a corporation, if such corporation: (a) has registered as a lobbyist, and (b) has designated one (1) or more of its employees as its official lobbyist, and (c) the person so designated by the corporation has also registered as a lobbyist.

Registering and Reporting

Lobbyists may now register and file their L-3 Monthly Reports and L-2 Annual/Semi Annual Reports electronically. The electronic versions are similar to the paper reports and require the same level of disclosure. If you register online, you will create an account and receive a username and password at that time. If you register through our office and provide your email address, you will be sent an email with your user name and password. The registration application and the reporting application are available 24 hours a day, 7 days a week.

Log on to www.sos.idaho.gov/LobbyistRegistration to access the online Lobbyist Registration application.

Log on to www.sos.idaho.gov/LobbyistReports to access Lobbyist Electronic Reporting application.
Registered Lobbyists need to be concerned with the following three forms:

Form L-1: Lobbyist Registration Statement
(This form also serves as the Amended Registration Statement.)

Form L-2: Lobbyist Annual/Semi-Annual Report

Form L-3: Lobbyist Monthly Report

Any individual may file a formal complaint on the L-5 form alleging that a person has violated provisions of Title 67, Chapter 66, Idaho Code, The Sunshine Law for Political Funds and Lobbyist Disclosure.

The L-5 form is available upon request from the Secretary of State’s Office.

Form L-1

A L-1 Lobbyist Registration Statement must be filed before engaging in any lobbying, or within thirty days after being employed as a lobbyist, whichever occurs first. The L-1 form must be accompanied with a fee of ten dollars ($10). A new L-1 form must be filed each year on or before January 10 if registration is to continue. A new L-1 must also be filed within one week of a modification or termination of the lobbyist's employment.

Any lobbyist who receives or is to receive compensation from more than one (1) person or organization for his services as a lobbyist shall file a separate L-1 Registration Statement for each employer, accompanied by the fee of ten dollars ($10.00) for each Registration Statement; except that where a lobbyist whose fee for acting as such in respect to the same legislation or type of legislation is, or is to be, paid or contributed by more than one (1) person then such lobbyist may file a single L-1 Registration Statement, in which he shall detail the name, business address and general occupation of each person so paying or contributing.

Completing the Form L-1

List the lobbyist's full name, complete mailing address, telephone number(s), email address and any temporary residence or business address in Ada County.

List the name and address of the lobbyist's employer, a contact person’s name and email for the employer along with the occupation or business of the lobbyist’s employer. Under “duration of lobbyist’s employment” state whether the lobbyist is employed permanently or temporarily, and if temporarily, please give the duration of the employment. Each lobbyist who has registered shall file a new L-1 Registration Statement on or before January 10, and failure to do so shall terminate his registration.

The lobbyist’s email address as well as the employers contact information will be used for notifications for electronic filings.
Form L-1 (continued)

Check whether the lobbying activities will be directed at the legislature, executive official(s) or both.

Check whether the lobbyist operates solely as a lobbyist or is performing lobbying duties in connection with regular employment.

Enter the name and address of the person who will have custody of the books required to be kept.

Enter by code the general subject areas of legislative interest from the table. A statement of “ALL” will not be accepted. **You must enter specific code numbers.**

Blank Spaces in the Report

Most people will find some items on the report which do not seem to apply to them at all. If “none” is a correct statement for those items, it should be entered. The item should not be left blank or marked “not applicable” -- this merely raises a question as to whether it has been overlooked or misunderstood.

Additions and Supplements

Occasionally, some reporting individuals will have more information to submit than can be stated in the space for the particular item on the form. Such information may be furnished on separate sheets and attached to the report. When this is done, an explanatory notation should be entered under the item itself and each separate sheet should be referenced to the item to which it pertains.

Certification

Each lobbyist’s L-1 Registration Statement must be signed by the lobbyist and dated.

Termination

In order to terminate a registration, the lobbyist must file an amended L-1 Registration Statement and state “terminated” under “Duration of lobbyist employment.” Lobbyists are also required to file an L-2 Annual Report at the time of their termination.

Form L-2

Who Must File

The Sunshine Law requires each lobbyist registered under Section 67-6617, Idaho Code, to file an Annual Report. Lobbyists whose activities are confined only to executive officials shall also file a Semi-Annual Report. Form L-2 is provided for this purpose.

**Note:** Statutory filing requirements must be met even though no reportable expenditures have been made during the reporting period.
Form L-2 (continued)

Filing Deadline

Annual Reports must be filed by January 31 after the end of each year. Semi-Annual Reports must be filed by July 31. The Secretary of State has adopted a rule which deems the postmark date of mailed statements as the date of filing.

Reporting Period

The expenditure totals on the Annual and Semi-Annual Reports shall be cumulative and shall reflect the total expenditures during the year.

To Be Filed With

Reports may be filed by any of the following methods:

1) Hand delivered to Ben Ysursa, Secretary of State, 700 W. Jefferson, Room E205
2) Mailed to P.O. Box 83720, Boise, Idaho 83720-0080
3) Faxed to (208) 334-2282
4) Signed reports may be scanned and emailed to elections@sos.idaho.gov
5) Electronically by logging on to www.sos.idaho.gov/LobbyistReports/

Signatures

Both the lobbyist and the employer must sign the Semi-Annual and Annual Report. This may be done electronically by logging on to www.sos.idaho.gov/LobbyistReports/ or by submitting a completed L-2 form.

Termination

The filing requirements of Section 67-6617, Idaho Code, continue throughout the year unless there is a termination of the lobbyist’s employment. If a lobbyist terminates during the year, a L-2 Annual Report must be filed for that portion of the year for which the lobbyist was registered. A lobbyist may terminate by filing an amended L-1 Registration Statement and a L-2 Annual Report with the Secretary of State.

Note: If a lobbyist terminates on April 10th, the annual report will cover from the date of registration through April 10th.

Item 1

Expenditures made or incurred directly or indirectly for any lobbying purpose shall be reported. List your expenditures for the reporting period as they were either directly reimbursed by a single employer or as a proportionate amount for each employer. Reported expenditures for entertainment, food and refreshments for legislators and other public officeholders shall be the actual cost of the entertainment, food and refreshments.
A. Entertainment, Food and Refreshment

This category includes all amounts expended for entertainment, including but not limited to food and refreshment. This category does not include amounts that are expended solely by the lobbyist for his own subsistence. Expenditures that are solely for the lobbyist’s subsistence should be listed under the category of Living Accommodations.

B. Living Accommodations

This category includes all expenditures for the lobbyist’s transient place of living. This includes expenditures pertaining to lodging, groceries, meals, and other expenditures necessary for the lobbyist’s subsistence. If the lobbyist is reimbursed for these expenses, they do not have to be reported.

Examples of Expenditures in A and B

Lobbyist X invites three legislators to lunch to discuss a certain piece of legislation. The total bill is $38.00 excluding the lobbyist’s portion. The lobbyist reports the $38.00 expenditure under the category of Entertainment, Food and Refreshment.

Lobbyist X, who is not reimbursed for meals while he is in Boise, goes to lunch with a few of his fellow lobbyists to discuss legislative strategy. He spends $12.50 for his lunch. This $12.50 expenditure for his meal should be listed under the category of Living Accommodations since it did not pertain to entertainment but rather was a personal living expense necessary for the lobbyist’s subsistence.

C. Advertising, Travel, Telephone

These categories are self-explanatory and should include all amounts expended for such purposes named in the category. If the lobbyist is reimbursed for personal travel, such travel expense does not have to be reported.

D. Other Expenses or Services

This includes those expenses not listed in the other categories and includes contributions of tangible or intangible property to or on behalf of any legislator or executive official or member(s) of their household. This does not include entertainment which is listed under the Entertainment, Food and Refreshment category.
Form L-2 (continued)

**Item 2**

The totals of each expenditure of more than one hundred five dollars ($105) for a legislator, other holder of public office, executive official or member(s) of their households shall be identified by date, place and amount along with the names of the legislators, holders of public office or executive officials and member(s) of their household in the group.

**Note:** The lobbyist’s portion of the expenditure is excluded in determining the one hundred five dollar ($105) amount.

**Item 3**

List the complete names and addresses of each employer. Multiple employers will be listed in the same order as their proportioned expenditures in Item 1.

**Item 4**

Itemize the legislation being supported or opposed including the appropriate Subject Codes and Bill, Resolution or other legislative identification number.

**Item 5**

Identify any rule, ratemaking decision, procurement, contract bid or bid process, or financial services agreement of bond you are supporting or opposing.

Form L-3

**Who Must File**

The Sunshine Law requires each lobbyist registered under Section 67-6617, Idaho Code, to file monthly periodic reports for each month or portion thereof that the legislature is in session.

**Note:** Statutory filing requirements must be met even though there may have been no active lobbying during the month.

**Filing Deadline**

Monthly reports shall be filed within fifteen (15) days of the first day of the month for the activities of the month just passed. The Secretary of State has adopted a rule which deems the postmark date of mailed statements as the date of filing.
To Be Filed With

Reports may be filed by any of the following methods:

1) Hand delivered to Ben Ysursa, Secretary of State, 700 W. Jefferson, Room E205
2) Mailed to P.O. Box 83720, Boise, Idaho 83720-0080
3) Faxed to (208) 334-2282
4) Signed reports may be scanned and emailed to elections@sos.idaho.gov
5) Electronically by logging on to www.sos.idaho.gov/LobbyistReports/

Monthly reports are only required to be filed during the legislative session.

Information Required

The L-3 Monthly Report is to be completed in the same manner as the L-2 Annual Report.

Signatures

Only the lobbyist is required to sign the monthly.
Penalties for Violation


(a) Any person who violates the provisions of section 67-6603 through 67-6614A, 67-6617, 67-6619, 67-6620, 67-6621(a), 67-6624, 67-6629 or 67-6630, Idaho Code, shall be liable for a civil fine not to exceed two hundred fifty dollars ($250) if an individual, and not more than two thousand five hundred dollars ($2,500) if a person other than an individual. The burden of proof for such civil liability shall be met by showing a preponderance of the evidence.

(b) Any person who violates section 67-6605 or 67-6621(b), Idaho Code, and any person who knowingly and willfully violates section 67-6603 through 67-6614A, 67-6617, 67-6619, 67-6620, 67-6621(a), 67-6624, 67-6629 or 67-6630, Idaho Code, is guilty of a misdemeanor and, upon conviction, in addition to the fines set forth in subsection (a) of this section, may be imprisoned for not more than six (6) months or be both fined and imprisoned.

(c) The attorney general or the appropriate prosecuting attorney may prosecute any violations of this act.

(d) Prosecution for violation of this act must be commenced within two (2) years after the date on which the violation occurred.

(e) Venue for prosecution under the provisions of this chapter shall be in the county of residence of the defendant if the defendant is a resident of the state of Idaho, otherwise venue shall be in Ada county.”


If any person fails to file a report or statement on or before a specified date, he shall be liable in an amount of fifty dollars ($50) per day after the deadline until the statement or report is filed, to the secretary of state. Liability need not be enforced by the secretary of state if on an impartial basis he determines that the late filing was not willful and that enforcement of the liability will not further the purposes of the act, except that no liability shall be waived if a statement or report is not filed within five (5) days after receiving written notice of the filing requirement from the secretary of state.

The remedy provided in this section is cumulative and does not exclude any other remedy or penalty prescribed in section 67-6625, Idaho Code.”
Duties of a Lobbyist

A person required to register as a lobbyist under this act shall also have the following obligations, the violation of which shall constitute cause of revocation of his registration, and may subject such person, and such person’s employer, if such employer aids, abets, ratifies or confirms any such act, to other civil liabilities, as provided by this act:

(a) Such persons shall obtain and preserve all accounts, bills, receipts, books, papers, and documents necessary to substantiate the financial reports required to be made under this act for a period of at least three (3) years from the date of the filing of the statement containing such items, which accounts, bills, receipts, books, papers and documents shall be made available for inspection by the Secretary of State at any reasonable time during such three (3) year period; provided, however, that if a lobbyist is required under the terms of his employment contract to turn any records over to his employer, responsibility for the preservation of such records under this subsection shall rest with such employer.

(b) In addition, a person required to register as a lobbyist shall not:

(1) Engage in any activity as a lobbyist before registering as such;

(2) Knowingly deceive or attempt to deceive any legislator to any fact pertaining to any pending or proposed legislation;

(3) Cause or influence the introduction of any bill or amendment thereto for the purpose of thereafter being employed to secure its defeat;

(4) Knowingly represent an interest adverse to any of his employers without first obtaining such employers’ consent thereto after full disclosure to such employers of such adverse interest;

(5) Exercise any economic reprisal, extortion, or unlawful retaliation upon any legislator by reason of such legislator’s position with respect to, or his vote upon, any pending or proposed legislation;

(6) Accept any employment as a lobbyist for a compensation dependent in any manner upon the passage or defeat of any proposed or pending legislation or upon any other contingency connected with the action of the legislature or of either branch thereof or of any committee thereof.
Filing Reports

Reports may be filed by any of the following methods:

1) Hand delivered to Ben Ysursa, Secretary of State, 700 W. Jefferson, Room E205
2) Mailed to P.O. Box 83720, Boise, Idaho 83720-0080
3) Faxed to (208) 334-2282
4) Signed reports may be scanned and emailed to elections@sos.idaho.gov
5) Electronically by logging on to www.sos.idaho.gov/LobbyistReports/

The date of postmark shall be deemed the date of filing for Monthly, Semi-Annual and Annual reports.

For further information or assistance contact the Secretary of State’s Office at (208) 334-2852 or at elections@sos.idaho.gov.
APPENDIX A

Reporting Dates for Lobbyists

<table>
<thead>
<tr>
<th>Report</th>
<th>Period Covered</th>
<th>Who Files</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Monthly</td>
<td>January</td>
<td>Legislative</td>
<td>February 15</td>
</tr>
<tr>
<td>2nd Monthly</td>
<td>February</td>
<td>Legislative</td>
<td>March 15</td>
</tr>
<tr>
<td>3rd Monthly</td>
<td>March</td>
<td>Legislative</td>
<td>April 15</td>
</tr>
<tr>
<td>Semi-Annual</td>
<td>Jan.1-June 30</td>
<td>Executive Only</td>
<td>July 31</td>
</tr>
<tr>
<td>Annual</td>
<td>Jan.1-Dec. 31</td>
<td>All Lobbyists</td>
<td>January 31</td>
</tr>
</tbody>
</table>

Note: A Monthly report is to be filed by legislative lobbyists every month or portion thereof while the legislature is in session.
APPENDIX B

Samples of Completed Lobbyist Forms
**Lobbyist Registration Statement**

**State of Idaho**

**Ben Ysursa**

**Secretary of State**

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**Lobbyist Year 2013**

<table>
<thead>
<tr>
<th>Date Prepared</th>
<th>January 5, 2013</th>
</tr>
</thead>
</table>

**Lobbyist's name and permanent business address**

**John Doe**

200 Hillway Drive  
Anytown, Idaho  83409

**Temporary residential and business address in Ada County during Legislative Session**

480 North Atlantic  
Anytown, Idaho  83409

**Name and address of employer**

**I.F.S. Inc.**

700 Rock Drive, Anytown, Idaho  83409

**Contact name:** John Smith  
**Contact email:** Jsmith@anyip.com

**Occupation or business of employer**

**Manufacturing of Automobiles**

**Duration of lobbyist employment**

**2013 Legislative Session**

**Lobbying activities will be directed at:**

- Legislature  
- Executive Official

**Lobbyist is employed and compensated**

- Solely as a Lobbyist  
- As a regular employee performing services for his employer which include, but are not limited to, the influencing of legislation.

**Name and address of the person who will have custody of the accounts, bills, receipts, books, papers and documents required to be kept under this act.**

**John Doe**

200 Hillway Drive  
Anytown, Idaho  83409

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**INSTRUCTIONS**

**Who should file this form:** All lobbyists, unless exempt under Section 67-6618 Idaho Code (see reverse side).

**Filing deadline:** Before doing any lobbying or within 30 days after being employed as a lobbyist, whichever occurs first.

**New Filing Required:** On or before each January 10. Termination of lobbyist's employment, changes, modifications, or within one week of change.

**Filing fee:** $10.00 per registration

**TO BE FILED WITH:**  
Ben Ysursa  
Secretary of State  
PO Box 83720  
Boise, ID 83720-0080  
Phone: (208) 334-2852  
Fax: (208) 334-2282

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**Telephone Numbers**

**Home:** (208) 555-1212  
**Business:** (208) 222-1515  
**Cell:** (208) 333-2525  
**Email:** Jdoe@anyip.com

**General Subject(s) of Lobbying Interest**

Enter code(s) from subject identification table below. List all applicable categories. *(A statement of ALL will not be acceptable.)*

<table>
<thead>
<tr>
<th>Code</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td></td>
</tr>
</tbody>
</table>

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**LOBBYING SUBJECT IDENTIFICATION**

**Code**  
**Subject**

01 Agriculture, horticulture, farming, and livestock
02 Amusements, games, athletics and sports
03 Banking, finance, credit and investments
04 Children, minors, youth, senior citizens
05 Church and religion
06 Consumer affairs
07 Ecology, environment, pollution, conservation, zoning, land and water use
08 Education
09 Elections, campaigns, voting, political parties
10 Equal rights, civil rights, minority affairs
11 Government, financing, taxation, revenue, budget, appropriations, bids, fees, funds
12 Government, county
13 Government, federal
14 Government, municipal
15 Government, special districts
16 Government, state
17 Health service, medicine, drugs and controlled substances, health insurance, hospitals
18 Higher education
19 Housing, construction, codes
20 Insurance (excluding health insurance)
21 Labor, salaries and wages, collective bargaining
22 Law enforcement, courts, judges, crimes, prisons
23 License, permits
24 Liquor
25 Manufacturing, distribution and services
26 Natural resources, forest and forest products, fisheries, mining and mining products
27 Public lands, parks, recreation
28 Social insurance, unemployment insurance, public assistance, workmen's compensation
29 Transportation, highways, streets and roads
30 Utilities, communications, television, radio, newspaper, power, CATV, gas
31 Other (please specify)  

Certification: I hereby certify that the above is a true, complete and correct statement in accordance with Section 67-6624 Idaho Code of this law.

**John Doe**  
01/05/13  
Lobbyist's Signature  
Date
Lobbyist Annual Report Form

L-2

Rev. 12/2012

State of Idaho

Ben Ysursa
Secretary of State

(Lobbyists name and permanent business address)

John Doe
200 Hillway Drive
Anytown, Idaho 83409

Date prepared
January 15, 2014

Period covered
Dec. 31 2013

Item 1
Totals of all reportable expenditures made or incurred by Lobbyist or by Lobbyist's Employer on behalf of Lobbyist's Employer.

| Category of Expenditure | *Total Amount for
<table>
<thead>
<tr>
<th></th>
<th>All Employers</th>
</tr>
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<tbody>
<tr>
<td>Entertainment</td>
<td>$786.00</td>
</tr>
<tr>
<td>Food and Refreshment</td>
<td>$566.00</td>
</tr>
<tr>
<td>Living Accommodations</td>
<td>$0.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>$0.00</td>
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<tr>
<td>Travel</td>
<td>$125.00</td>
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<tr>
<td>Telephone</td>
<td>$230.00</td>
</tr>
<tr>
<td>Other Expenses or Services</td>
<td>$355.00</td>
</tr>
</tbody>
</table>

Total
$1,496.00

*When the number of employers you are reporting for requires multiple L-2 forms to be filed a total amount for all employers should be entered on Page 1.

Item 2
The totals of each expenditure of more than one hundred fifty dollars ($150) for a legislator, other holder of public office, executive officials and member(s) of their household.

<table>
<thead>
<tr>
<th>Date</th>
<th>Place</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan. 1</td>
<td>Gamekeeper - Boise</td>
<td>105.65</td>
</tr>
<tr>
<td>Feb. 21</td>
<td>Stardust - Idaho Falls</td>
<td>136.00</td>
</tr>
<tr>
<td>Mar. 20</td>
<td>Doubletree - Boise</td>
<td>109.00</td>
</tr>
<tr>
<td>July 4</td>
<td>Turf Club - Twin Falls</td>
<td>175.00</td>
</tr>
</tbody>
</table>

Names of Legislators, Public and Executive Officials and Household Members in Group

- Senator W
- Senator Z
- Representative T
- Governor X and Lt. Governor Y

Item 3

Employer(s) Name(s) and Address(es)

No. 1
I.F.S.
700 Rock Drive, Anytown, Idaho 83406

No. 2
X.Y.Z.
200 Boulder Drive, Anytown, Idaho 83406

No. 3

No. 4

INSTRUCTIONS

Who should file this form: Any lobbyist registered under Section 67-6617 Idaho Code

Filing deadline: Annual report is due on January 31st. Executive Lobbyist semi-annual report due July 31st.

TO BE FILED WITH:

Ben Ysursa
Secretary of State
PO Box 83720
Boise, ID 83720-0080
Phone: (208) 334-2852  Fax: (208) 334-2282

 Continued on attached page(s)
### LEGISLATIVE SUBJECT IDENTIFICATION

<table>
<thead>
<tr>
<th>Code</th>
<th>Subject</th>
<th>Code</th>
<th>Subject</th>
</tr>
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<tbody>
<tr>
<td>01</td>
<td>Agriculture, horticulture, farming, and livestock</td>
<td>17</td>
<td>Health service, medicine, drugs and controlled substances, health insurance, hospitals</td>
</tr>
<tr>
<td>02</td>
<td>Amusements, games, athletics and sports</td>
<td>18</td>
<td>Higher education</td>
</tr>
<tr>
<td>03</td>
<td>Banking, finance, credit and investments</td>
<td>19</td>
<td>Housing, construction, codes</td>
</tr>
<tr>
<td>04</td>
<td>Children, minors, youth, senior citizens</td>
<td>20</td>
<td>Insurance (excluding health insurance)</td>
</tr>
<tr>
<td>05</td>
<td>Church and religion</td>
<td>21</td>
<td>Labor, salaries and wages, collective bargaining</td>
</tr>
<tr>
<td>06</td>
<td>Consumer affairs</td>
<td>22</td>
<td>Law enforcement, courts, judges, crimes, prisons</td>
</tr>
<tr>
<td>07</td>
<td>Ecology, environment, pollution, conservation, zoning, land and water use</td>
<td>23</td>
<td>License, permits</td>
</tr>
<tr>
<td>08</td>
<td>Education</td>
<td>24</td>
<td>Liquor</td>
</tr>
<tr>
<td>09</td>
<td>Elections, campaigns, voting, political parties</td>
<td>25</td>
<td>Manufacturing, distribution and services</td>
</tr>
<tr>
<td>10</td>
<td>Equal rights, civil rights, minority affairs</td>
<td>26</td>
<td>Natural resources, forest and forest products, fisheries, mining and mining products</td>
</tr>
<tr>
<td>11</td>
<td>Government, financing, taxation, revenue, budget, appropriations, bids, fees, funds</td>
<td>27</td>
<td>Public lands, parks, recreation</td>
</tr>
<tr>
<td>12</td>
<td>Government, county</td>
<td>28</td>
<td>Social insurance, unemployment insurance, public assistance, workmen's compensation</td>
</tr>
<tr>
<td>13</td>
<td>Government, federal</td>
<td>29</td>
<td>Transportation, highways, streets and roads</td>
</tr>
<tr>
<td>14</td>
<td>Government, municipal</td>
<td>30</td>
<td>Utilities, communications, televisions, radio, newspaper, power, CATV, gas</td>
</tr>
<tr>
<td>15</td>
<td>Government, special districts</td>
<td>31</td>
<td>Other (please specify)</td>
</tr>
<tr>
<td>16</td>
<td>Government, state</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CERTIFICATION:** I hereby certify that the above is a true, complete and correct statement in accordance with Section 67-6624 Idaho Code.

---

**John Doe**

Lobbyist signature: 1/15/14

**John Smith**

Employer No. 1 signature: 1/20/14

**Sue Hayes**

Employer No. 2 signature: 1/20/14

Employer No. 3 signature

Employer No. 4 signature

---

**PAC-E-30-09**
Lobbyist Monthly Report Form

REV. 12/2012

Lobbyist Monthly Report Form

State of Idaho
Ben Ysursa
Secretary of State

Lobbyist's name and permanent business address
John Doe
200 Hillway Drive
Anytown, Idaho 83409

Date prepared
March 7, 2013

Period covered
Feb. 21

Lobbyist's Monthly Report Form

Category of Expenditure
Reimbursed Personal Living and Travel Expenses Pertaining to Lobbying Activity

Item 1
Total Amount for All Employers

<table>
<thead>
<tr>
<th>Employer No. 1</th>
<th>Employer No. 2</th>
<th>Employer No. 3</th>
<th>Employer No. 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>$300.00</td>
<td>$80.00</td>
<td>$220.00</td>
</tr>
<tr>
<td>Food and Refreshment</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Living Accommodations</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Telephone</td>
<td>$45.00</td>
<td>$25.00</td>
<td>$20.00</td>
</tr>
<tr>
<td>Other Expenses or Services</td>
<td>$295.00</td>
<td>$260.00</td>
<td>$35.00</td>
</tr>
</tbody>
</table>

Total
$640.00       $365.00       $275.00       $0.00       $0.00

The totals of each expenditure of more than one hundred five dollars ($105) for a legislator, other holder of public office, executive officials and member(s) of their household.

<table>
<thead>
<tr>
<th>Date</th>
<th>Place</th>
<th>Amount</th>
<th>Names of Legislators, Public and Executive Officials and Household Members in Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb. 21</td>
<td>Stardust - Idaho Falls</td>
<td>136.00</td>
<td>Senator Z</td>
</tr>
</tbody>
</table>

INSTRUCTIONS

Who should file this form: Any lobbyist registered under Section 67-6617 Idaho Code

Filing deadline: Monthly reports due within fifteen (15) days of the month for activities of the past month.

TO BE FILED WITH:
Ben Ysursa
Secretary of State
PO Box 83720
Boise, ID 83720-0080
Phone: (208) 334-2852 Fax: (208) 334-2282

Lobbyist Monthly Report Form

Page 1 of 1 Page(s)

THIS SPACE FOR OFFICE USE ONLY
### LEGISLATIVE SUBJECT IDENTIFICATION

<table>
<thead>
<tr>
<th>Item</th>
<th>Subject matter of proposed legislation, the number of the Senate or House Bill, Resolution or other legislative activity in which the Lobbyist was supporting or opposing.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td><strong>Subject Code (from table)</strong></td>
</tr>
<tr>
<td></td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>29</td>
</tr>
<tr>
<td></td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Agriculture, horticulture, farming, and livestock</td>
</tr>
<tr>
<td>02</td>
<td>Amusements, games, athletics and sports</td>
</tr>
<tr>
<td>03</td>
<td>Banking, finance, credit and investments</td>
</tr>
<tr>
<td>04</td>
<td>Children, minors, youth, senior citizens</td>
</tr>
<tr>
<td>05</td>
<td>Church and religion</td>
</tr>
<tr>
<td>06</td>
<td>Consumer affairs</td>
</tr>
<tr>
<td>07</td>
<td>Ecology, environment, pollution, conservation, zoning, land and water use</td>
</tr>
<tr>
<td>08</td>
<td>Education</td>
</tr>
<tr>
<td>09</td>
<td>Elections, campaigns, voting, political parties</td>
</tr>
<tr>
<td>10</td>
<td>Equal rights, civil rights, minority affairs</td>
</tr>
<tr>
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<td>Government, financing, taxation, revenue, budget, appropriations, bids, fees, funds</td>
</tr>
<tr>
<td>12</td>
<td>Government, county</td>
</tr>
<tr>
<td>13</td>
<td>Government, federal</td>
</tr>
<tr>
<td>14</td>
<td>Government, municipal</td>
</tr>
<tr>
<td>15</td>
<td>Government, special districts</td>
</tr>
<tr>
<td>16</td>
<td>Government, state</td>
</tr>
<tr>
<td>17</td>
<td>Health service, medicine, drugs and controlled substances, health insurance, hospitals</td>
</tr>
<tr>
<td>18</td>
<td>Higher education</td>
</tr>
<tr>
<td>19</td>
<td>Housing, construction, codes</td>
</tr>
<tr>
<td>20</td>
<td>Insurance (excluding health insurance)</td>
</tr>
<tr>
<td>21</td>
<td>Labor, salaries and wages, collective bargaining</td>
</tr>
<tr>
<td>22</td>
<td>Law enforcement, courts, judges, crimes, prisons</td>
</tr>
<tr>
<td>23</td>
<td>License, permits</td>
</tr>
<tr>
<td>24</td>
<td>Liquor</td>
</tr>
<tr>
<td>25</td>
<td>Manufacturing, distribution and services</td>
</tr>
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<td>26</td>
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</tr>
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</tr>
<tr>
<td>31</td>
<td>Other (please specify)</td>
</tr>
</tbody>
</table>

---

**CERTIFICATION:** I hereby certify that the above is a true, complete and correct statement in accordance with Section 67-6624 Idaho Code.

**John Doe**

Lobbyist signature

Date

3/07/13
Welcome to the Idaho Secretary of State’s Online Lobbyist Reporting application. This application is designed to make reporting for lobbyists faster and more convenient.

In order for a Lobbyist or an Employer to access the Online Lobbyist Reporting Application, a valid email address must have been provided on the Lobbyist’s Registration Form. Once the login has been created in our application, an email will be sent to each individual containing their User ID and temporary password. Once this information is received, they will then be able to login to the Online Lobbyist Reporting Application.

Access and Log In to the Application

Accessing the Application

To access the online reporting application,

1. Open an internet browser.

The Log In page will be displayed.

Log In to the Application

On the Log In screen,

1. Enter your log in email address in the Email Address field.
2. Enter your password into the Password field.
3. Click the Log On pushbutton or hit the ‘Enter’ key to login to the application.

Either the First Time Security Question screen (Figure 2) or the Main Menu screen (Figure 6 – Lobbyist Main Menu or Figure 22 – Employer Main Menu) will be displayed.
First Time Security Questions

The first time you sign into the Online Lobbyist Reporting Application, you are required to select three (3) security questions. These security questions will be used if you forget your password and require that it be re-set.

Selecting Security Questions

On the First Time Security Questions screen,

1. Select a question from the first drop down question box.

2. Type the response to the question selected in the answer box below the question.

3. Repeat steps 1 and 2 to select the second and third security questions.

4. Click the Save pushbutton.

The Main Menu screen will be displayed.

Lobbyists: See Figure 6 below.

Employers: See Figure 22 below.

Changing your Password

It is recommended that you change your password upon logging into the Online Lobbyist Reporting Application for the first time. You should select a password that you will easily remember but is not easily guessed by others. Also, you are responsible for the security of your password. Do not share it with others.

To change your password,

1. Click on the Change Password link on the Main Menu screen (Figure 3).
The Change Password screen is displayed.

![Change Password](image)

**Figure 3 – Change Password screen**

**Entering a new Password**

On the Change Password screen,

1. Enter your current password into the Current password field.
2. Enter your new password into the New password field.
3. Re-enter your new password into the third field to confirm that it is typed correctly.
4. Click the **Next** pushbutton to save the new password. The screen is refreshed with a positive acknowledgement.
5. Click **Continue** pushbutton.

The Login screen (Figure 1) is displayed.

![Change Password Successful](image)

**Figure 4 – Change Password Successful screen**

**NOTE:** You will be required to sign into the Online Lobbyist Reporting application after changing your password. See Login to the Application above for instructions on logging into the application.

**Completing the Password Change**

On the Log In screen,

1. Enter your log in email address in the Email Address field.
2. Enter your password into the Password field.

3. Click the Log On pushbutton or hit the ‘Enter’ key to log in to the application.

The Main Menu screen is displayed.

Lobbyists: See Figure 6 below.

Employers: See Figure 22 below.

Forgot Password

If you are unable to remember your password, you can reset it through the online Lobbyist Reporting Application or you may contact the Secretary of State’s Office and request your password to be reset.

To reset your password,

1. Click the Forgot Password link on the login page.

The Forgotten your Password screen is displayed.

![Figure 5 – Forgotten Password screen](image)

Identify Your Log In

On the Forgotten your Password screen,

1. Enter your email address.

2. Click on the Next pushbutton. The screen is refreshed with Step 2.

3. Enter the correct response to the first Security Question presented.

4. Click on the Next pushbutton. The screen is refreshed with Step 3.

5. Enter the correct response to the second Security Question presented.

Upon verifying your responses are correct, the application will display a message indicating that a temporary password is being emailed to you. Once received, you may sign into the Online Lobbyist Application using your temporary password as explained above in “Log In the Application.”

---

**NOTE:** Upon signing in using your new temporary password, you will be required to immediately change your password to ensure the security of your Online Lobbyist Reporting account.
Lobbyist Reporting

Lobbyist Main Menu

Once signed into the Online Lobbyist Reporting Application as a Lobbyist, the Main Menu will be displayed.

![Figure 6 - Lobbyist Main Menu]

Selecting your Lobbyist Account

Once signed into the Online Lobbyist Reporting Application, a list of record(s) associated with your log on will be displayed. In most cases, this list will contain only one record. However, if you are the designated lobbyist for a company, you will see a record for your lobbyist registration(s) and the company registration.

In the list of Lobbyist record(s) associated with your log on (Figure 6),

1. Click on the Select link to the right of the Lobbyist record.

The Lobbyist’s Reports screen is displayed. This screen displays all report(s) that have been filed by the Lobbyist, if any. To review past reports, click on the report name.
File a Report

To Add a new report.

1. Click the New Report pushbutton.

The Report entry screen is displayed.

NOTE: The online filing will be done on the report entry screen. When filing a new report, the report entry screen will be displayed with the reporting box empty.
Figure 8 – Report Entry Screen
Select the Reporting Period

To select the reporting period,

1. Select the reporting period from the Reporting Period drop-down box.
   a. Only the reports that are required to be filed based on your Lobbyist Registration are displayed in this drop-down box.

The Preparation Date, Ending Date, and Due Date will auto-fill based on the reporting period selected.

![Figure 9 – Reporting Period Selected](image)

**NOTE:** The reporting period drop down box is now disabled. If you need to select a different reporting period, you will need to either click your browser’s refresh button or click the **Report Menu** link at the top of the screen. If you click on the **Report Menu** link, you will need to click on the **New Report** pushbutton again.

Completing the Report

Regardless of which reporting period is selected, Items 1 through 5 are required to be completed. These items do not changed based on the reporting period.

**Item 1**

To report expenditures for Item 1,

1. Enter the expenditure values for each Category for each employer for the selected reporting period.

![Figure 10 – Item 1 section](image)
NOTE: If you are lobbying for multiple employers and do not wish to submit reports for all of your employers at once, you may select the employers you wish to submit reports for instead of selecting all of your employers at once. To do so, uncheck the box to the left of the employer you wish to exclude from the report. This will submit a partial report. This is particularly useful if you terminate your reporting requirements for one of your employers but are still lobbying on behalf of other employers.

### Item 2

To report itemized events for Item 2,

1. Enter the date of the event in the Date field.
2. Enter the location of the event in the Place field.
3. Enter the total amount being allocated to the Legislators, Public and Executive Officials and the members of their households in the Amount field.
4. Enter the Names of the Legislators, Public and Executive Officials and the members of their households in the Names of Legislators, Public and Executive Officials and the members of their households field.
5. Click on the Add to List link.

**NOTE:** You must click on the Add to List link to include the event in the report. If you do not click on this link, the entered event will not be included in your submission.

**Figure 11 – Item 2**

### Item 2 - Editing Events

To edit entered itemized events for Item 2,

1. Click on the Edit link to the right of the event to be edited. The screen refreshes with the selected event available for editing in Item 2 edit fields.
2. Make any necessary changes.
3. Click on the Update Changes link.
The screen will refresh and display the changes in the event list.

**Figure 12 – Item 2 – Edit**

**Item 2 – Deleting an Event**

To delete an entered itemized events for Item 2,

1. Click on the **Delete** link to the right of the event to be deleted. The screen refreshes and the event will be removed from the list.

**Figure 13 – Item 2 – Delete**

**Item 3**

Item 3, Employer Name(s) and Address(es) is automatically completed upon submission of your report. You do not need to enter any information regarding your employers or their addresses.

**Item 4**

To report Legislation supported or opposed by the Lobbyist for Item 4,

1. Select the Legislation Type from the Code drop-down list. The list of Codes is below.

   - H.B. House Bill
   - S.B. Senate Bill
   - Appr. Appropriation
   - H.C.R. House Concurrent Resolution
   - H.J.M. House Joint Memorial
   - H.J.R. House Joint Resolution
   - H.P. House Proclamation
   - H.R. House Resolution
   - R.S. Routing Slip
   - S.C.R. Senate Concurrent Resolution
   - S.J. M. Senate Joint Memorial
   - S.J.R. Senate Joint Resolution
   - S.P. Senate Proclamation
   - S.R. Senate Resolution
2. Enter the bill number in the Description field.
3. Click the **Add to List** link to add the bill to the List of Legislation.

![Figure 14 – Item 4 – Legislation](image)

**Item 4 - Editing Legislation**

To edit entered Legislation for Item 4,

1. Click on the **Edit** link to the right of the Bill to be edited. The screen refreshes with the selected event available for editing in Item 4 edit fields.

2. Make any necessary changes.

3. Click on the **Update Changes** link.

The screen will refresh and display the changes in the event list.

![Figure 15 - Item 4 – Editing Legislation](image)
Item 4 – Deleting Legislation

To delete an entered Bill for Item 4,

1. Click on the **Delete** link to the right of the Bill to be deleted. The screen refreshes and the Bill is removed from the list.

![Figure 16 - Item 4 - Deleting Legislation](image-url)
Item 4 – Legislative Subject Codes

To report Legislative Subject Codes for Item 4,

1. Click the checkbox next to the all subject codes that apply.

2. To enter your own description, click the checkbox to the left of number 31.
   a. If you check number 31, you are required to enter a description on the line provided below number 31.

<table>
<thead>
<tr>
<th>LEGISLATIVE SUBJECT IDENTIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, horticulture, farming, and livestock</td>
</tr>
<tr>
<td>2 Amusements, games, athletics and sports</td>
</tr>
<tr>
<td>3 Banking, finance, credit and investments</td>
</tr>
<tr>
<td>4 Children, minors, youth, senior citizens</td>
</tr>
<tr>
<td>5 Church and religion</td>
</tr>
<tr>
<td>6 Consumer affairs</td>
</tr>
<tr>
<td>7 Ecology, environment, pollution, conservation, zoning, land and water use</td>
</tr>
<tr>
<td>8 Education</td>
</tr>
<tr>
<td>9 Elections, campaigns, voting, political parties</td>
</tr>
<tr>
<td>10 Equal rights, civil rights, minority affairs</td>
</tr>
<tr>
<td>11 Government, financing, taxation, revenue, budget, appropriations, bids, fees, funds</td>
</tr>
<tr>
<td>12 Government, County</td>
</tr>
<tr>
<td>13 Government, Federal</td>
</tr>
<tr>
<td>14 Government, Municipal</td>
</tr>
<tr>
<td>15 Government, special districts</td>
</tr>
</tbody>
</table>

NOTE: You will not be allowed to complete the Lobbyist Report if you have selected number 31 but have not entered a description in the field below it.

Certifying the Report – Electronic Signature

To complete electronically sign the report and submit the filing,

1. Click the checkbox to the left of the Certification.

2. Click on the Submit pushbutton.

The screen will refresh and give a positive acknowledgement that the report was submitted successfully.

CERTIFICATION: I hereby certify that the above is a true, complete and correct statement in accordance with Section 67-6624, Idaho Code.

Figure 17 - Item 4 - Legislative Subject Codes

Figure 18 - Certification Successful
View the Report after Certification

It is recommended that you view your report in a printable format upon certification and submission. The printable format appears in a pdf version of the completed Lobbyist Report form just as you would normally file in a paper format. It is also recommended that you print a copy for your records.

After submitting your report and receiving the Saved successfully message,

1. Click on the View As PDF pushbutton.

A pop-up window appears asking what you want to do with the file. The options are to either Open the file or Save the file. If you select Open, the pdf version will be displayed in a new pop-up window. You may then either print the file or save the document. If you select Save, the pdf file may be saved to your computer.

Report Status

Once you submit your report electronically, the status of your report will show as Pending. You will be able to make changes or corrections to your submission as long as your status shows as Pending.

<table>
<thead>
<tr>
<th>File No</th>
<th>File Date</th>
<th>Last Name</th>
<th>First Name</th>
<th>Company Name</th>
<th>Reporting Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>4865</td>
<td>12/18/2012</td>
<td>Doe</td>
<td>John</td>
<td></td>
<td>2012</td>
</tr>
</tbody>
</table>

You can review or edit any filed report(s) or you can create a new one, by clicking the 'New Report' pushbutton.

Figure 19 - Report Screen - Pending Report
Receipt of Report by the Secretary of State’s Office

Once you submit your report electronically, the Secretary of State’s Office Election’s staff will receive notification of your submission. You will be able to make changes to your submission until it has been reviewed and marked as Received by the Secretary of State’s Office. Once your electronic report is marked asReceived, you will no longer be allowed to make modifications.

Any amended reports must be submitted to the Secretary of State’s Office via paper submission.

![Figure 20 - Report Screen - Received Report]

Reviewing a Received Report

You can review a report that has been marked as Received by the Secretary of State’s Office at any time.

On the Lobbyist Report screen,

1. Click on the name of the report in the Reports Filed column.

The report will be displayed in a read only format. You will not be able to make any changes to the report.

Partial or Incomplete Report

A report that has been submitted and has been marked as Received by the Secretary of State’s Office but is not complete will be marked with a red asterisk to the right of the Online Filing Status. This asterisk is to notify you that the report needs attention usually this indicates a missing signature by your employer.

![Figure 21 - Online Filing Status]
NOTE: You are responsible for getting your employer to sign your report. They are able to electronically sign your report. For your employer to electronically sign your completed report, your employer must have received a log on email from our office during the registration process. If your employer would prefer to sign a hard copy of your report, you can print the pdf report that you received upon submission of your completed report for your employer to sign and return to the Secretary of State’s Office either by mail, fax or email.

Logging Out of the Application

On any screen,

1. Click Log Off pushbutton at the top right of the screen.

The Log In screen is displayed.

Online Employer Reporting

Accessing the Application

To access the online reporting application, see the instructions under the heading Access and Log In to the Application above.

Employer Main Menu

Once signed into the Online Lobbyist Reporting Application as an Employer, the Main Menu will be displayed.

<table>
<thead>
<tr>
<th>Year</th>
<th>File No</th>
<th>File Date</th>
<th>Employer Company Name</th>
<th>Reporting Period</th>
<th>Lobbyist Company Name/Last Name/First Name</th>
<th>Online Signature</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>4865</td>
<td>01/01/2013</td>
<td>I.F.S. Inc.</td>
<td>Lobbyist Annual</td>
<td>Jon Doe</td>
<td>No</td>
<td>Select</td>
</tr>
</tbody>
</table>

Figure 22 - Employer Main Menu

Selecting your Lobbyist’s Record

Once signed into the Online Lobbyist Reporting Application as an Employer, you will see a list of Lobbyist record(s) associated with your log on. These Lobbyist(s) have identified you as their Employer.

In the list of Lobbyist record(s) associated with your log on (Figure 22),

1. Click on the Select link to the right of the Lobbyist record.
The completed report is displayed for the selected Lobbyist record.

**Figure 23 – Employer’s Report**
Review the Report

As the Employer, you are signing the Lobbyist’s Report electronically. You should review the Lobbyist’s Report prior to signing and submitting the filing.

NOTE: The Lobbyist(s) report will be displayed in a read only format. You will not be allowed to make any changes to their report. If you have questions regarding their report, you will need to contact your Lobbyist.

Certifying the Report – Electronic Signature

To electronically sign the report and submit the filing after you have reviewed the Lobbyist’s Report,

1. Click the checkbox to the left of the Certification.
2. Click on the Submit pushbutton.

The screen will refresh and give a positive acknowledgement that the report was submitted successfully.

View the Report after Certification

It is recommended that you view your report in a printable format upon certification and submission. The printable format appears in a pdf version of the completed Lobbyist Report form just as you would normally file in a paper format. It is also recommended that you print a copy for your records.

After submitting your report and receiving the Saved successfully message,

1. Click on the View As PDF pushbutton.

A pop-up window appears asking what you want to do with the file. The options are to either Open the file or Save the file. If you select Open, the pdf version will be displayed in a new pop-up window. You may then either print the file or save the document. If you select Save, the pdf file may be saved to your computer.

Logging Out of the Application

On any screen,

1. Click Log Off pushbutton at the top right of the screen.

The Log In screen is displayed.