



DELBERT HOSEMANN
Secretary of State

Mississippi Secretary of State

The Lobbying Online Reporting System

Lobbyist User Guide



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to be taken directly to it*



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Introduction

The Lobbying Online site is designed to provide filing search functionality to the general public and online filing to registered users.

Registering as a Lobbyist

While you can search for reports without logging in to the Lobbying Online Site, you must log in to submit filings.

To log in to the Lobbying Online Site, you must be a registered user.

1. In your web browser, go to <https://sos.ms.gov/elec/portal/mse12/page/onlineFiling/portal.aspx>
The Elections home page displays.

The screenshot shows the 'Registered Lobbyist' login screen. At the top, there is a banner with the Mississippi Secretary of State seal on the left and the text 'DELBERT HOSEMANN Secretary of State' in the center, with a golden eagle emblem. Below the banner is a navigation menu on the left with links for 'Home', 'Lobbyists', 'Clients', 'Reporting Deadlines', and 'Report Search'. The main content area is titled 'Registered Lobbyist' and contains the text 'Login in to submit or renew licenses'. It features two input fields for 'Username:' and 'Password:'. Below these fields are three buttons: 'Login', 'Forgot Password?', and 'New Users'. A 'Lobbyist User's guide' link is located in the top right corner. The 'New Users' button is highlighted with a blue box.

2. The *Registered Lobbyist* login screen displays.
3. Click the **(New Users)** button.



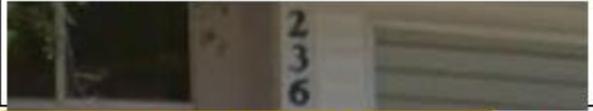
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4. A *Create Lobbyist Account* screen displays.
5. Please enter the words above the text box, type the words displayed in the box immediately above.
This is to verify that you are a person and not an automated program attempting to gain access to the system.

Create Lobbyist Account

Please verify you are a person by entering the text below

If you can't read the words in the picture, you can either click the  (Reload) button, which will automatically generate another set of words, or click the  (Audio) button, which provides a set of words for you to listen to and type for verification.



Please enter the words above:



6. Click the **(Continue)** button.
7. A form for gathering personal information displays.
8. Fill out the form.



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Name Information

Title	First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Suffix			
<input type="text"/>			

Physical Address Information

Address 1	Address 2(eg: Suite# 201)	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	MISSISSIPPI
			Zip
			<input type="text"/>

Mailing address same as Physical

Mailing Address Information

Address 1	Address 2(eg: Suite# 201)	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	MISSISSIPPI
			Zip
			<input type="text"/>

Phone Information

Primary Phone	Mobile Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address Information

Email	Confirm Email	The e-mail address you enter will also be your username.
<input type="text"/>	<input type="text"/>	

Type your information into the boxes provided, and remember that the *e-mail address you enter will be your username*

9. Click the **(Confirm)** button when all information has been entered.



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10. When the Account Created screen comes up click the **(Close)** button.
11. Check your email at the email address you provided. There should be a new message in your inbox with a temporary password.

Thank you for creating an account with the Mississippi Secretary of State's office. system are below.

USERNAME: slamb@dorgersoft.com

PASSWORD: 9vV8nE

You will be required to change your password upon your first login.

12. You will need the temporary password ready for the next step.

Registered Lobbyist

Login in to submit or renew licenses

Username:

Password:

15. Enter your Username (*email address*) and Temporary Password and click the (Login) button. The next step will allow you to change the Temporary Password to one you create.



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Password Change Required

Change Password

User passwords cannot be blank. Password are case sensitive. Password has expired. Please update your password below:

Old Password:

New Password:

Confirm Password:

16. Enter your Temporary Password in the Old Password box.
15. Enter a new the password that you create in the New Password box, and once again into the Confirm Password box.
16. The password you enter into the New Password (Confirm) box must match the password you entered into the New Password box perfectly.
17. Click the **(Update)** button.



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Tabs-Lobbyist

Across the upper part of the Online Filing page are tabs where you may navigate between **Current Clients**, **Pending Clients**, **Terminated Clients**, and your **Profile**. The default tab is the Client(s) tab. *If you have more than one client, there will be a tab for XMC Reports.*

Client(s)

The *Client(s)* tab is automatically open upon login. You may navigate back to this tab by clicking on it.

Client(s)	Pending Client(s)	Terminated Client(s)	XMC Reports	My Profile
Online Filing				
Register A Client				
Register Client(s)				
You have 0 pending client(s)				
Click ' Details ' link to review the registration and Create/Submit Lobbyist Reports.				
Lobbying Year 2016				

Here you may register clients, view current clients, file a report.



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Pending Client(s)

Click on the *Pending Client(s)* tab to view client registrations that are incomplete or not paid for yet.

Payment must be received within 10 days of registration or the client will be removed from your profile and you will have to register the client again. State law prohibits you to lobby for clients in the list below until your payment has been received.

My Pending Client Registrations

Select All

Description	Create Date
<input checked="" type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Architects, Inc.	02/06/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays	02/04/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays	02/04/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	01/29/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Client Test10	01/13/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 1	01/12/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	12/19/2014
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Client Test10	10/10/2014
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 1	02/04/2014

Submit Payment Edit / Change Delete

Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete.

At this point you may Submit Payment, Edit/Change, or Delete the client registration.

1. Click the **(Submit Payment)** button to be redirected to the Mississippi Payment Gateway.
2. Or click the **(Edit/Change)** button to go to the name, address and contact information page to make any changes or corrections and continue from there.
3. If you wish to delete the client registration click the **(Delete)** button.

My Profile

Click on the *My Profile* tab to Update, Change or View your profile.

Client(s) Pending Client(s) Terminated Client(s) **My Profile**

My Profile

View/Update My Profile Update Preferences Change Password

Click the **(View/Update My Profile)** to go to your general information page and update your name, address, and phone information. If you need to change your password at any time click the **(Change Password)** button.



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Password Change Required

Change Password

User passwords cannot be blank. Password are case sensitive. Password has expired. Please update your password below:

Old Password:

New Password:

Confirm Password:

1. Enter your old password into the first box
2. Enter a new password that you create into the second box
3. Enter the new password again into the third box to confirm. *When you enter the new password into the second and third boxes they must match perfectly.*
4. Click the **(Update)** button to complete the password change.

Register a Client

When logged in as a Lobbyist you may register Clients.

1. Under the **Client(s)** tab In the Register A Client box click the **(Register Client(s))** button.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

You have 9 pending client(s)



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- Enter your Client’s company name in the box provided for Entity Name.

Please enter your client’s company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

- Enter your client’s company name and click the **(Search)** button.

Please enter your client’s company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

Entity Name	Address	Contact	Contact Details
Mary Poppins Nannies Inc. of Greater Mississippi	440 Cedars of Lebanon Jackson, MS 39206	Robert Jacobs	Tel: 1-601-982-5783 Fax: 1-601-982-5847

If the record you are searching for is not in the list above or there are no matching records then click New to continue.

- Under the box marked Entity Name, Click on the [name](#) of your client’s company to continue registration.

Please enter your client’s company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

No matching records were found.

If the record you are searching for is not in the list above or there are no matching records then click New to continue.

- If the client’s company does not appear in the search results click the **(New)** button to continue.
- This takes you to a page to fill in the client’s business address and contact information. *The client’s address and contact information will not have to be filled out if you selected a company from the search results. If it is a new company or there are no matching records you will need to fill out the client’s address and contact information.*



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Entity Name

Name
Captain Crunch

Physical Address Information

Address 1 Address 2(eg: Suite# 201) City State
[] [] [] MISSISSIPPI ▼

Zip
[]

Mailing address same as Physical

Mailing Address Information

Address 1 Address 2(eg: Suite# 201) City State
[] [] [] MISSISSIPPI ▼

Zip
[]

Contact Information

First Name Middle Name Last Name
[] [] []

Title Telephone 1 Fax
[] [] []

Email Confirm Email
[] []

Cancel Back **Next**

- Fill in the Physical Address Information, Mailing Address Information (or click the [checkbox] next to *Mailing address same as Physical*), and Contact Information.
- When you are finished filling in the information, click the **(Next)** button to continue.



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- Fill in Client Business Details in the boxes provided.

Kind of Business of Lobbyist Client <input type="text"/>		<input type="checkbox"/> Client is an Agency of the State
President <input type="text"/>	Director 1 <input type="text"/>	Additional Business Membership: <input type="text"/>
Vice President <input type="text"/>	Director 2 <input type="text"/>	
Secretary <input type="text"/>	Director 3 <input type="text"/>	
Treasurer <input type="text"/>	Director 4 <input type="text"/>	
<input type="button" value="Cancel"/>	<input type="button" value="Back"/>	<input type="button" value="Next"/>

- If the client is an Agency of the State click the [checkbox] at the top right.
- Click the **(Next)** button to continue to the Lobbyist Employment and Issues page.



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- Enter Lobbying Issues and other Lobbyist employed by the Client.

The screenshot shows a web form for entering lobbying information. It includes three dropdown menus for 'Lobbying Issue', each currently set to '(none)'. There are two date fields: 'Lobbying Begin Date' (2/6/2015) and 'Lobbying Ending Date' (12/31/2015). A text box labeled 'Other' is present. A larger text box on the right is titled 'Other Lobbyists in Mississippi Employed by Client'. At the bottom are 'Cancel', 'Back', and 'Next' buttons. A blue callout box with white text says: 'Click on the boxes under Lobbying Issue to open a dropdown menu.'

- In the dropdown menu you may choose from several Lobbying Issues.
- Click on the lobbying issue that applies to the client to select it.
- You may repeat this step in the other Lobbying Issue boxes to enter more lobbying issues if needed.
- In the box titled Other you may enter additional information
- In the Lobbying Begin Date box enter the date when the lobbying begins, or click on the  calendar button to bring up a calendar and choose a date from there.
- Enter the Lobbying Ending Date
- You may enter other Lobbyists in Mississippi Employed by the client in the box provided.
- Click the **(Next)** button to continue on to review and submit your client registration.



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- Review the client's information to be sure all is correct.

Client Information

Client Name : **Captain Crunch**
Contact Name : Captain Crunch
Telephone 1 : (123)456-7890
Email : captain@crunch.com

Physical Address

123 Mainstreet
Jackson, MS 39206

Mailing Address

123 Mainstreet
Jackson, MS 39206

Client Business Details

Kind of Business of Lobbyist Client :	Cereal
President :	Mary Poppins
Vice President :	
Secretary :	
Treasurer :	
Director 1 :	
Director 2 :	
Director 3 :	
Director 4 :	
Client is an Agency of the State :	
Additional Business Membership :	

Lobbyist Employment and Issues

Lobbying Issue :	Alcoholic beverages
Lobbying Issue :	Business & Commerce
Lobbying Issue :	Cemeteries and crematoriums
Other :	
Lobbying Begin Date :	2/6/2015
Lobbying Ending Date :	12/31/2015
Other Lobbyists in Mississippi Employed by Client :	

Cancel Back **Submit**

- If the information displayed is not correct click the **(Back)** button to go to the previous page and make any necessary changes.
- When you are sure all of the information is correct click the **(Submit)** button to continue.



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- Here you may choose to pay now, pay later or register another client.

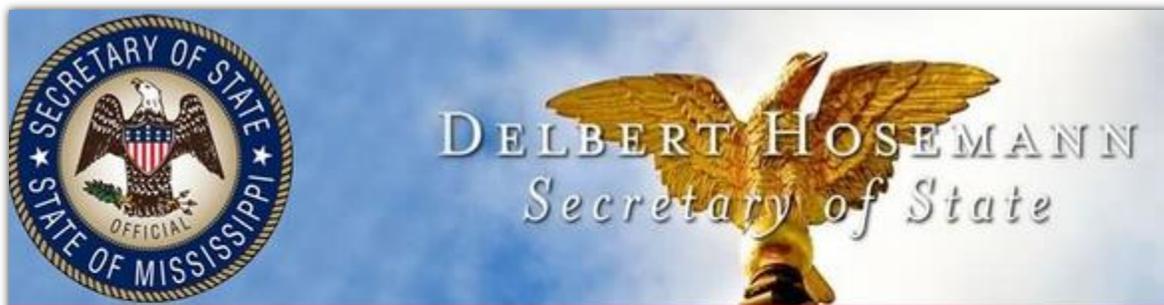


Check out?

Are you ready to check out or do you want to register another client?

- Click the **(Pay Now)** button to go to a page that will redirect you to the State of Mississippi Payment Gateway.
- Click the **(Pay Later)** button to save the client registration for later payment.
- Click the **(I want to register another client)** button to register another entity.

Pay Now



Pay Now?

You are about to be redirected to the State of Mississippi Payment Gateway

Click the **(Next)** button to go to the State of Mississippi Payment Gateway.



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I want to register another client

Click the **(I want to register another client)** button in order to be directed back to enter another entity.

Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

Pay Later

When you click the **(Pay Later)** button your client registration will be saved under the **Pending Clients** tab.

My Pending Client Registrations

Select All

Description	
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Captain Crunch
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Archtects, Inc.
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays
<input type="checkbox"/>	<i>If payment is not received within 10 days of registration, the client will be removed from your profile and you will have to register the client again.</i>
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Archtects, Inc.
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Client Test10
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 1

Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete. At this point you may Submit Payment, Edit/Change, or Delete the client registration.

- Click the **(Submit Payment)** button to be redirected to the Mississippi Payment Gateway.
- Or click the **(Edit/Change)** button to go to the name, address and contact information page and continue from there.
- If you wish to delete the client registration click the **(Delete)** button.



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Filing Reports as a Lobbyist

1. Go under the *Client(s)* tab on the online filings page.
2. Choose the Lobbying Year you want to view from the lobbying year dropdown menu.
3. This will display a list of Client Registrations for that year.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

Register Client(s)

You have 10 pending client(s)

Click 'Details' link to review the registration and Create/Submit Lobbyist Reports.

Lobbying Year **2015**

Certificate #	Description	Status	Effective Date	Expire Date
Details 20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	Filed - Verified	01/13/2015	12/31/2015

Print Preview

4. Click the [Details](#) link to review the registration and Create/Submit Lobbyist Reports. You will use this path to file Mid/End Session, Annual, and Termination Reports.

File a Report Submitted Reports Registration Info

New Reports

Create Mid/End Session Report Create Annual Report **Download Lobbyist Expense Template**

Pending Expense Reports
No Expense Reports Found

Click the (Download Lobbyist expense Template) button if you wish to import expenses from a spreadsheet later on.

5. There are tabs across the top labeled *File a Report*, *Submitted Reports*, and *Registration Info*.
6. Under the *File a Report* tab notice the box titled *New Reports* where you will see the **(Create Mid/End Session Report)**, **(Download Lobbyist Expense Template)** and **(Create Annual Report)** buttons.



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Create Mid/End Session Report

- Click on the **(Create Mid/End Session Report)** button under the File a Report tab

The screenshot shows a web interface with three tabs: 'File a Report', 'Submitted Reports', and 'Registration Info'. The 'File a Report' tab is active. Below the tabs is a dark blue header labeled 'New Reports'. Underneath, there are three buttons: 'Create Mid/End Session Report' (which is highlighted with a blue border), 'Create Annual Report', and 'Download Lobbyist Expense Template'.

- Click the **(Mid-Session)** button to start a Mid-Session report, or click the **(End-of-Session)** button to start an End-of-Session report.

The screenshot shows a dialog box titled 'Form E Type'. The question 'Is this the mid-session or end-of-session report?' is displayed. Below the question are three buttons: 'Mid-Session', 'End-of-Session', and 'Cancel'.

- The following steps cover both Mid-Session and End-of-Session reports.

Expenses Actions-(Mid/End-Session report)

- Add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button. If you have more than one client, you can use **(Import XMC)** [click here to learn about XMC .](#)

The screenshot shows a section titled 'Expenses Actions' with a dark blue header. Below the header are four buttons: 'Add Expenses', 'Import From Spreadsheet', 'Download Lobbyist Expense Template', and 'Import XMC'. Below the buttons is the text 'Expense Items' and a note: 'The XMC Report cannot be edited at this stage. However, all other expenses added here may be edited.'

The XMC Report cannot be edited while filing Mid/End-Session Reports, to edit XMC reports go to the XMC tab.



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Add Expenses

1. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.
2. Type the recipient’s name in the Recipient box and choose the Recipient’s Office Title from the dropdown menu.

Recipient <input type="text"/>	Recipient's Office Title Governor
Date <input type="text"/>	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award
Item Description <input type="text"/>	Value/Cost <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Type the date into the Date box or click on the calendar button to bring up a calendar and select a date.

Date
08/01/2014

August 2014						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

3. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
4. After you click the **(Next)** button you will be taken back to the Form E – Mid-Session- Expense Report page that shows your newly entered Expense Item.



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Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input checked="" type="checkbox"/> Capt. Crunch	Judge	Feb 8 2015	Cereal Town	GM	Award	Frosted	\$10.00

Select All

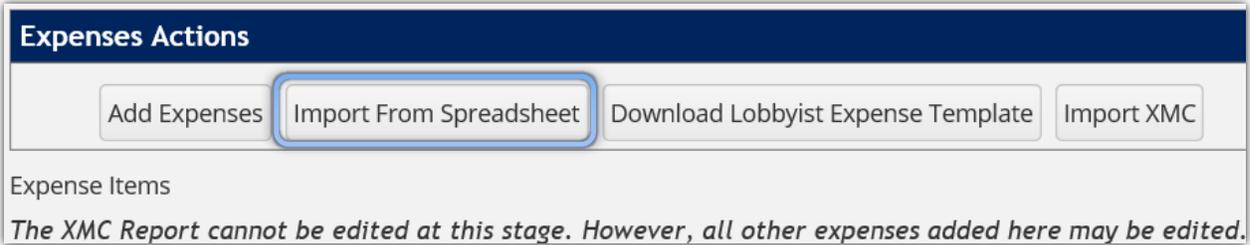
Total Value/Cost	\$10
Expenses Count	1

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.



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Import from Spreadsheet



Expenses Actions

Add Expenses **Import From Spreadsheet** Download Lobbyist Expense Template Import XMC

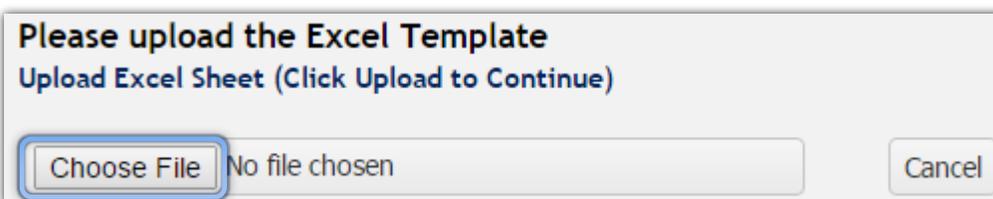
Expense Items

The XMC Report cannot be edited at this stage. However, all other expenses added here may be edited.

1. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

2. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)** button.
3. Next you will come to a screen where you may choose a file from your computer



Please upload the Excel Template

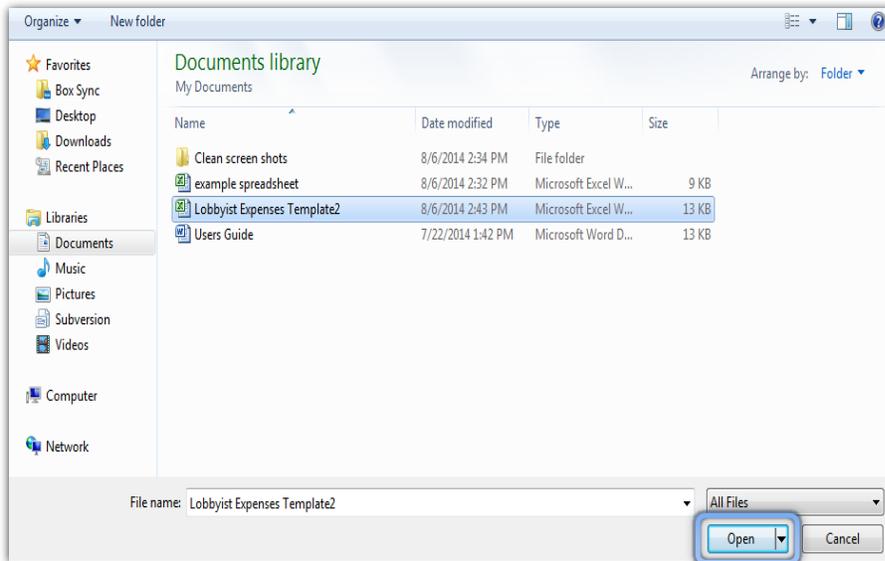
Upload Excel Sheet (Click Upload to Continue)

Choose File No file chosen Cancel

4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



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Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.



5. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Mid/End-Session report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

 Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.

Enter all of the requested information.

Click the **(Next)** button when you are finished.

2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.

<input type="checkbox"/> Select All				
Date	Place/Location	Est. No. Public Officials	Est. Total Attendance	Total Reception Cost
<input checked="" type="checkbox"/> Feb 4 2015	Jackson MS	50	20	\$10
<input type="checkbox"/> Select All				

Total Receptions Cost	\$10
Receptions Count	1

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.



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Report Actions-(Mid/End-Session report)

Report Actions

1. Click the **(Preview Report)** button to preview the report before submitting.

OR

2. Click the **(Submit Report)** button to continue to submit report.

Submit Report

You are about to Submit Expense Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

3. If you think that something needs to be changed or modified on the report click the **(Cancel)** button.
4. If you are sure that the report is correct click the **(Submit)** button.



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Lobbyist Expenses

Expenses submitted.

OK

5. Click the **(OK)** button to continue.

File a Report **Submitted Reports** Registration Info

Submitted Reports

Select All

	File Number	Report Type	Report Status	Date Created
<input type="checkbox"/> View/Print	LE20150011	Form E - Mid Session	Filed - Lobbyist Report	2/9/2015 11:47:38 AM
<input type="checkbox"/> View/Print	LE20150002	Form E - Mid Session	Filed - Lobbyist Report	1/19/2015 2:42:32 PM

View/Print Report(s) Amend Report(s)

6. The Submitted Report can now be viewed under the Submitted Reports tab.

7. To view or print the report, first click the [check box] that corresponds with the report, click the **(View/Print Report(s))** button. If there are changes that need to be made to the report, click the **(Amend Report(s))** button.



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Create Annual/Termination Report

1. Go under the **Client(s)** tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

Register Client(s)

You have 10 pending client(s)

Click '**Details**' link to review the registration and Create/Submit Lobbyist Report

Lobbying Year: **2015**

Certificate #	Description
Details L20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software

3. This will display a list of Client Registrations for that year click on the **Details** link.
4. To create Annual or Termination reports click the **(Create Annual Report)** button.

File a Report Submitted Reports Registration Info

New Reports

Create Mid/End Session Report **Create Annual Report** Download Lobbyist Expense Template



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5. This will take you to the Form A Type page where you may choose between Annual or Termination Report.

Form A Type

Is this the Annual report or Termination report ?

Annual Report

Termination Report

To create annual reports click the **(Annual Report)** button.

OR

To create termination reports click the **(Termination Report)** button.

Annual Report

Expenses
Select current expense reports to import expenses to Annual/Termination report.

<input checked="" type="checkbox"/> All	FileNumber	FilingDesc	FilingTypeDesc	FilingStatus
<input checked="" type="checkbox"/>	LE20150011	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report
<input type="checkbox"/>	LE20150002	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report

Next Cancel

1. Click on the [checkbox] to the left that corresponds with the expense reports you wish to import to the Annual or Termination report.
2. Click the **(Next)** button.



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::Lobbyist Annual Report

Lobbyist Compensation

Fee :

Salary :

Retainer :

Reimbursement :

Other :

Other Description :

Add/Edit Compensations

3. Add compensation by clicking the **(Add/Edit Compensations)** button.
4. Fill out the Lobbyist Compensation form.

Fee

Salary

Retainer

Reimbursement

Other

Other Description

Cancel Next

5. Click the **(Next)** button.



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Secretary of State

6. To add administrative costs click the **(Add/Edit Administrative Costs)** button.

Lobbyist Administrative Costs

Overhead :

Support :

Employees who communicated with public officials :

Urging Others To Communicate :

Food and beverage, travel and lodging. DO NOT include Receptions :

Entertainment, gifts, anything of Value, loans, honorariums :

Add/Edit Administrative Costs

Fill out the Lobbyist Administrative Cost form and click the **(Next)** button.

Overhead <input type="text"/>	Urging Others To Communicate <input type="text"/>
Support <input type="text"/>	Food and beverage, travel and lodging. DO NOT include Receptions <input type="text"/>
Employees who communicated with public officials <input type="text"/>	Entertainment, gifts, anything of Value, loans, honorariums <input type="text"/>
<input type="button" value="Cancel"/>	<input type="button" value="Next"/>



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Expenses Actions-(Annual Report)

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button. If you have more than one client, you can use **(Import XMC)** [click here to learn about XMC](#).

Expenses Actions

Add Expenses
Import Expenses From Spreadsheet
Download Lobbyist Expense Template
Import XMC

Expense Items

Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input type="checkbox"/> XMC Reipients	Other	Sep 11 2015	XMC Report	XMC Report	Other	Items Attached	\$662.50

Select All

Total Value/Cost	\$662.5
Expenses Count	1

Edit Expense
Remove Expense

The XMC Report cannot be edited while filing Annual Reports, to edit XMC reports go to the XMC tab.

Add Expenses

6. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.



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Recipient <input type="text"/>	Recipient's Office Title Governor
Date <input type="text"/>	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award
Item Description <input type="text"/>	Value/Cost <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Date
08/01/2014

August 2014						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Type the date into the Date box or click on the calendar button to bring up a calendar and select a date.

7. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
8. After you click the **(Next)** button you will be taken back to the Annual Report page that shows your newly entered Expense Item.



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Expense Items

Select All

	Recipient	Recipient's Office Title	Date	Place	Provider	Expense
<input checked="" type="checkbox"/>	DSA	Governor	Jan 19 2015	Test	DSA	Award
<input type="checkbox"/>	DSA	Treasurer	Feb 7 2015	DSA	DSA	Award

Select All

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.



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Import from Spreadsheet

Expenses Actions

Expense Items

Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input type="checkbox"/> XMC Reipients	Other	Sep 11 2015	XMC Report	XMC Report	Other	Items Attached	\$662.50

Select All

Total Value/Cost	\$662.5
Expenses Count	1

6. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.
7. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)**.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

8. Next you will come to a screen where you may choose a file from your computer

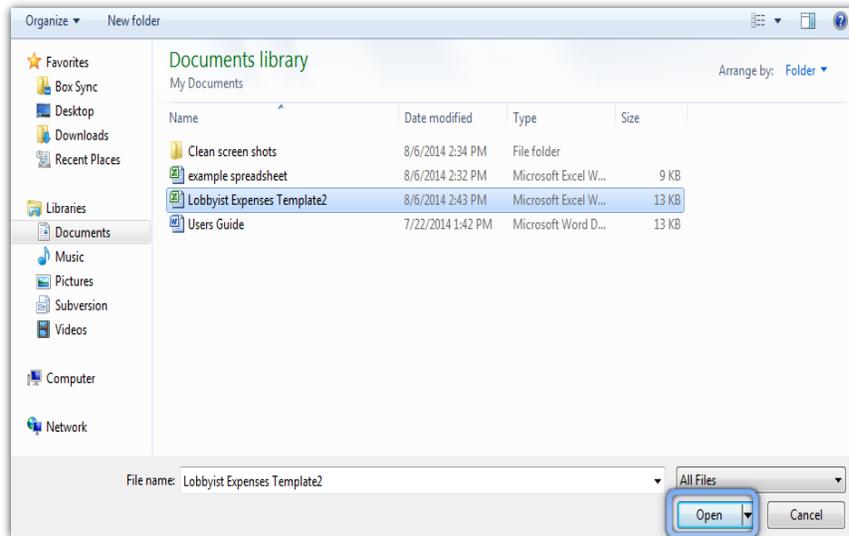
Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

No file chosen

9. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



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Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.



10. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Annual Report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.



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Reception Items

Select All

	Date	Place/Location	Est. No. Public Officials	Est. Total At
<input type="checkbox"/>	Jan 19 2015	Mobile AL	1	1
<input checked="" type="checkbox"/>	Feb 5 2015	Jackson MS	500	10

Select All

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.



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Report Actions-(Annual Report)

1. You may see a preview of your annual report before submission by clicking the **(Preview Annual Report)** button. A separate window will open with a preview of your annual report.

A dialog box titled "Report Actions" with a dark blue header. Below the header, there are two buttons: "Preview Annual Report" and "Submit Annual Report".

Report Actions

Preview Annual Report Submit Annual Report

2. After reviewing the annual report for correctness, if you are ready to submit click the **(Submit Annual Report)** button. This will bring you to a Submit Report screen.

A dialog box titled "Submit Report" with a light gray background. It contains a warning message and two buttons: "SUBMIT" and "CANCEL".

Submit Report

You are about to Submit Annual Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

SUBMIT CANCEL

3. Click the **(SUBMIT)** button.

A dialog box titled "Lobbyist Annual Report" with a light gray background. It contains a confirmation message and an "OK" button.

Lobbyist Annual Report

Annual Report submitted.

OK

4. Click the **(OK)** button to finish.



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Termination Report

1. Go under the **Client(s)** tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

The screenshot shows the 'Client(s)' tab selected. Below the tabs is a 'Register A Client' section with a 'Register Client(s)' button. Below that, it says 'You have 10 pending client(s)'. A red 'Details' link is highlighted. Below the link is a 'Lobbying Year' dropdown menu set to '2015'. Below the dropdown is a table with two columns: 'Certificate #' and 'Description'. The first row of the table has a 'Details' link in the first column, '20150005' in the second column, and 'Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Te' in the third column.

	Certificate #	Description
Details	20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Te

3. This will display a list of Client Registrations for that year click on the **Details** link.
4. In order to create a termination report, click the **(Create Annual Report)** button.

The screenshot shows the 'File a Report' tab selected. Below the tabs is a 'New Reports' section with three buttons: 'Create Mid/End Session Report', 'Create Annual Report', and 'Download Lobbyist Expense Template'. The 'Create Annual Report' button is highlighted with a blue border.



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Form A Type

Is this the Annual report or Termination report ?

Annual Report

Termination Report

5. Click on the **(Termination Report)** button.
6. On the Expenses screen check the [checkbox] that corresponds with the expense report you wish to add to the Termination report.

Expenses

Select current expense reports to import expenses to Annual/Termination report.

<input type="checkbox"/> All	FileNumber	FilingDesc	FilingTypeDesc
<input type="checkbox"/>	LE20150011	Form E - Mid-Session	Lobbyist Mid-Session Expense Report
<input checked="" type="checkbox"/>	LE20150002	Form E - Mid-Session	Lobbyist Mid-Session Expense Report
<input type="checkbox"/>			

Next

Cancel

7. Click the **(Next)** button.



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::Lobbyist Termination Report

Lobbyist Compensation

Fee :

Salary :

Retainer :

Reimbursement :

Other :

Other Description :

Add/Edit Compensations

8. Add compensation by clicking the **(Add/Edit Compensations)** button.

Fee

Salary

Retainer

Reimbursement

Other

Other Description

Cancel Next

Fill out the Lobbyist
Compensation form and click
the **(Next)** button.



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Lobbyist Administrative Costs

Overhead :

Support :

Employees who communicated with public officials :

Urging Others To Communicate :

Food and beverage, travel and lodging. DO NOT include Receptions :

Entertainment, gifts, anything of Value, loans, honorariums :

Add/Edit Administrative Costs

9. To add administrative costs click the **(Add/Edit Administrative Costs)** button.

Overhead	<p>Fill out the Lobbyist Administrative Costs form, and click the (Next) button</p>	Urging Others To Communicate
<input type="text"/>		<input type="text"/>
Support		Food and beverage, travel and lodging. DO NOT include Receptions
<input type="text"/>		<input type="text"/>
Employees who communicated with public officials		Entertainment, gifts, anything of Value, loans, honorariums
<input type="text"/>		<input type="text"/>
<input type="button" value="Cancel"/>		<input type="button" value="Next"/>



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Expense Actions-(Termination report)

Expenses Actions

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button. If you have more than one client, you can use **(Import XMC)** [click here to learn about XMC](#).

The XMC Report cannot be edited while filing Mid/End-Session Reports, to edit XMC reports go to the XMC tab.

Add Expenses

- Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.
- Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

Recipient <input type="text"/>	Recipient's Office Title Governor ▼
Date <input type="text"/>	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award ▼
Item Description <input type="text"/>	Value/Cost <input type="text"/>

Type the date into the Date box or click on the calendar button to bring up a calendar and select a date.

- Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
- After you click the **(Next)** button you will be taken back to the Termination Report page that shows your newly entered Expense Item.



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Expense Items

Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input checked="" type="checkbox"/> Apt. Crunch	Judge	Feb 27 2015	Cereal Town	GM	Award	Frosted	\$50.00

Select All

Total Value/Cost	\$50
Expenses Count	1

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.

Import from Spreadsheet

Expenses Actions

11. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.
12. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)**.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

13. Next you will come to a screen where you may choose a file from your computer



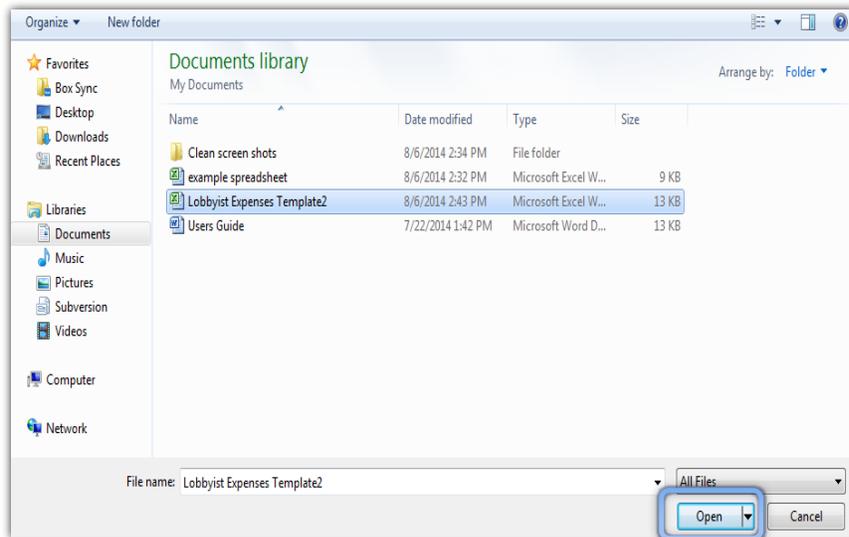
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Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Choose File No file chosen

Cancel

14. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.

Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Choose File smile.docx

Upload

Cancel

15. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Termination report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

Receptions Actions

Reception Items

Date <input type="text"/> 	Est. Number of Public Officials <input type="text"/>
City <input type="text"/>	Est. Total Attendance <input type="text"/>
State <input type="text"/>	Total Reception Cost <input type="text"/>
Establishment <input type="text"/>	
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

2. Type the date into the Date box or click on the  calendar button to bring up a calendar to select a date.
3. Fill in the rest of the boxes
4. Click the **(Next)** button when you are finished.
5. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.



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Select All

Date	Place/Location	Est. No. Public Officials	Est. Total Attendance	Total Reception Cost
<input type="checkbox"/> Feb 4 2015	Jackson MS	50	20	\$10
<input type="checkbox"/> Feb 28 2015	Jackson MS	850	1000	\$1230

Select All

Total Receptions Cost
Receptions Count

Edit Receptions Remove Receptions

6. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.

Report Actions – (Termination report)

1. You may see a preview of your termination report before submission by clicking the **(Preview Termination Report)** button. A separate window will open with a preview of your annual report.
2. After reviewing the termination report for correctness, if you are ready to submit click the **(Submit Termination Report)** button. This will bring you to a Submit Report screen.

Report Actions

Preview Report Submit Termination Report

3. A Termination Report submission cannot be reversed.

Submit Report

You are about to Submit Termination Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

SUBMIT CANCEL

4. Click the **(SUBMIT)** button if you are ready to submit or click the **(CANCEL)** button if you are unsure.



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XMC Reports

The XMC Report allows Lobbyists to file expenses for multiple clients at one time. The XMC Reports tab is only visible to Lobbyists who represent multiple clients. When logged in to the Lobbyist site, from the XMC Reports tab you can create a new report, view/edit an existing report or delete a report. When editing a report the user can add and remove clients, add/edit/remove expenses, import expenses from spreadsheet and download the expense template.

Creating an XMC Report

1. Click the XMC Reports tab.

The screenshot shows a navigation menu with a dark blue sidebar on the left containing the following items: Elections, Home, Lobbyists, Clients, Reporting Deadlines, and Report Search. To the right, a horizontal menu contains buttons for Client(s), Pending Client(s), Terminated Client(s), XMC Reports (highlighted with a blue box), and My Profile. Below this menu is a link for Online Filing.

2. Click the **(Create XMC Report)** button.

The screenshot shows the 'XMC Reports' page. At the top, there is a breadcrumb 'Online Filing » XMC Reports' and a navigation menu with buttons for Client(s), Pending Client(s), Terminated Client(s), XMC Reports (highlighted), and My Profile. Below the navigation is a dark blue header for 'XMC Reports Actions' containing a 'Create XMC Report' button (highlighted with a blue box). Underneath is the section 'My XMC Reports.' with a 'Report Year' dropdown set to '2015'. At the bottom, there is a table with two columns: 'Description' and 'Created On'.

	Description	Created On
<input type="checkbox"/> Details	XMC -Kaeser;;Crunch;DSA	9/16/2015 2:00:00 PM



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- Click on a filing year to use.

Lobbyist

Select the XMC Form Filing Year

2014

2015

Lobbyist Clients

Select Clients for Form XMC

<input type="checkbox"/> All	EntityNumber	EntityName
<input checked="" type="checkbox"/>	0000169	TK Testing Company One
<input checked="" type="checkbox"/>		Captain Crunch
<input type="checkbox"/>		Dorger Software Architects, Inc.
<input checked="" type="checkbox"/>	0000154	Dorger Software Test Company
<input type="checkbox"/>	0000170	TK Testing Inc Two
<input checked="" type="checkbox"/>	0000171	TK Co Three

Next Cancel

- Clients will be listed as above, select multiple clients to include on the Form XMC by clicking the [checkboxes] on the left side of the table. Click the **(Next)** button.



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XMC Report Description

You may name this XMC to your choosing or keep the system defaulted name.
Please Note: This will be the only time you may change the title of this XMC.

XMC -Kaeser;;TK Testing Company One;Captain C

Next

Cancel

5. Here you can name the report or keep it as it is, but this will be the only time you can change the title of this XMC. Click the **(Next)** button.



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::Form XMC

XMC Description : XMC - To test with

XMC Report Year : 2015

SECTION B: Benefiting Clients / Certificate Numbers

To add another client to the XMC Client list, click the **(Add Client)** button.

Client Name	Cert Number	
TK Testing Company One	L20150019	Remove
Captain Crunch	L20150013	Remove
Dorger Software Test Company	L20150005	Remove
TK Co Three		

The clients you selected will show on the Form XMC. Remove a client by clicking the corresponding **Remove** link.

Expenses Actions

Expense Items

No Expenses Found

Clients

Select Client

<input checked="" type="checkbox"/> All	Client Name
<input type="checkbox"/>	Dorger Software Architects, Inc.
<input checked="" type="checkbox"/>	TK Testing Inc Two

When adding a client, click the [checkbox] that corresponds with the client to add to the Form XMC and click the **(Next)** button.



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Add Expenses to an XMC Report

Expenses Actions

Add Expenses Import From Spreadsheet **Download Lobbyist Expense Template**

Expense Items

No Expenses Found

From here you can download the Lobbyist Expense Template, by clicking the Download Lobbyist Expense Template button. This is needed to import expenses from a spreadsheet.

Save Report

Import from spreadsheet

1. Click the **(Import from Spreadsheet)** button.

Expenses Actions

Add Expenses **Import From Spreadsheet** Download Lobbyist Expense Template

Expense Items

2. Click the **(Browse)** button.

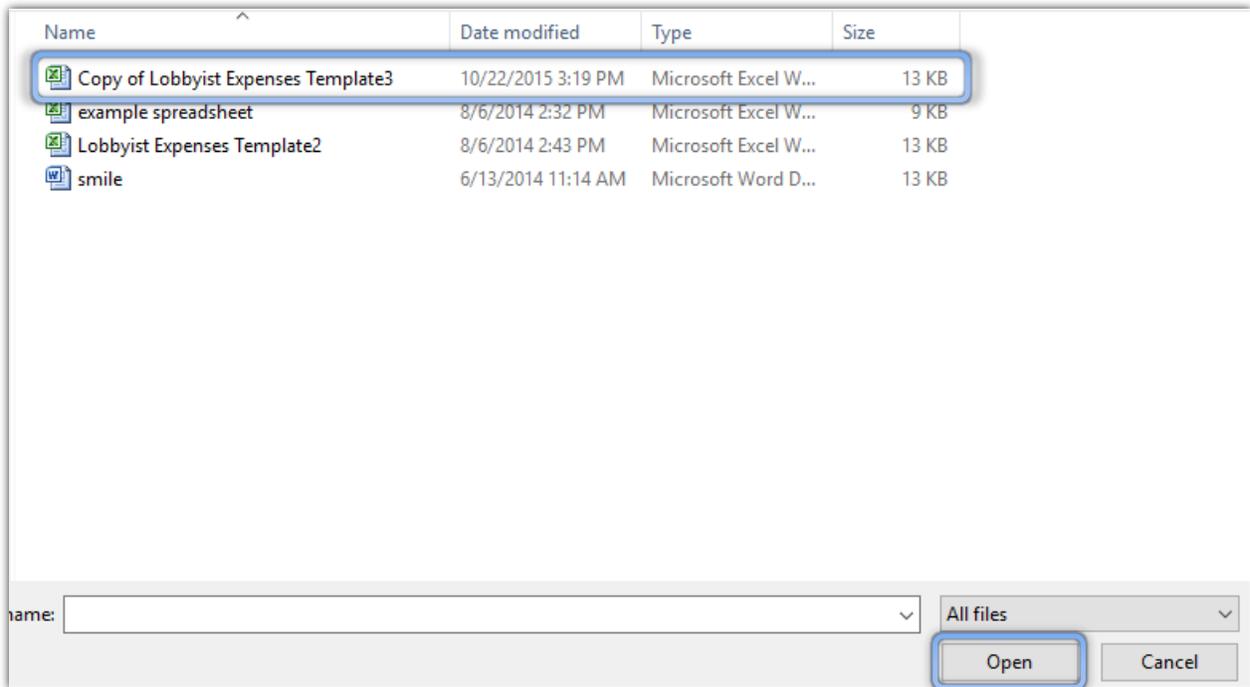
Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Browse... Cancel

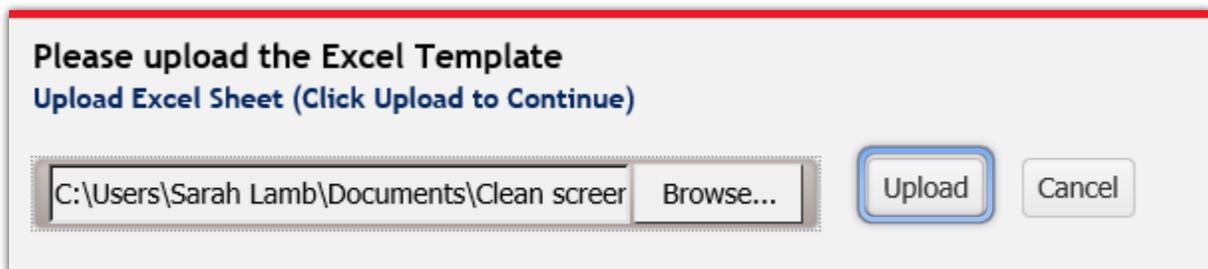


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- Select the Lobbyist Expenses sheet to upload.



3. Click the **(Open)** button.



4. Click the **(Upload)** button.



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From here, you can edit or remove expenses by clicking the check box next to the expense item and clicking either the **(Edit Expense)** or **(Remove Expense button)**. You can Edit or Delete multiple expense items at a time by clicking multiple checkboxes.

<input type="checkbox"/> Select All								
Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost	
<input checked="" type="checkbox"/> Mickey Mouse	Governor	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Minney Mouse	Attorney General	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Donald Duck	Secretary of State	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Daisy Duck	Treasurer	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Goofy Dog	State Auditor	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Prince Charming	Commissioner of Agriculture and Commerce	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
<input type="checkbox"/> Snow White	Commissioner of Insurance	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00	
								<input type="checkbox"/> Select All
							Total Value/Cost	\$875
							Expenses Count	7
<input type="button" value="Edit Expense"/> <input type="button" value="Remove Expense"/>								

Edit Expense – click on the checkbox next to the expense item or items that you want to change and click the **(Edit Expense)** button.

Recipient
Mickey Mouse

Date
6/29/2015

Provider
DSA

Item Description
Conference

Recipient's Office Title
Governor

Place
Downtown Disney

Expense Type
Event Ticket

Value/Cost
125.00

Click the calendar icon to pick a date from a calendar or type the date in.

The Recipient's Office Title and Expense Type fields have drop down lists with options for selection.

Click **(Next)** when finished



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Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input type="checkbox"/> Mickey Mouse	Governor	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$144.00
<input type="checkbox"/> Minney Mouse	Attorney General	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/> Donald Duck	Secretary of State	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/> Daisy Duck	Treasurer	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/> Goofy Dog	State Auditor	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/> Prince Charming	Commissioner of Agriculture and Commerce	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/> Snow White	Commissioner of Insurance	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00

Select All

Total Value/Cost	\$894
Expenses Count	7

Remove expense – Click the checkbox next to the expense item or items that you want to remove and click the **(Remove Expense)** button.

Delete Selected Expenses

Would you like to delete the following expenses ?

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type
Minney Mouse	Attorney General	6/29/2015 12:00:00 AM	Downtown Disney	DSA	Event Ticket
Donald Duck	Secretary of State	6/29/2015 12:00:00 AM	Downtown Disney	DSA	Event Ticket

Click the **(Yes)** button to delete.



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Expenses Actions - Add Expenses Button

Expenses Actions

1. Click the **(Add Expenses)** button.

Recipient
 Recipient Name
 Date: 10/01/2015
 Provider: Provider Name
 Item Description: A toaster, so shiny and chrome

Recipient's Office Title
 Public Employee

Place
 Public Employee Place

Expense Type
 Wedding Gift

Value/Cost
 2500

Click the calendar icon to pick a date from a calendar or type the date in.
 The Recipient's Office Title and Expense Type fields have drop down boxes with options to click on.

2. Fill out the information and click the **(Next)** button.

<input type="checkbox"/>	Snow White	Commissioner of Insurance	Jun 29 2015	Downtown Disney	DSA	Event Ticket	Conference	\$125.00
<input type="checkbox"/>	Recipient Name	Public Employee	Oct 7 2015	Public Employee Place	Provider Name	Wedding Gift	A toaster, so shiny and chrome.	\$2500.00

Select All

Total Value/Cost	\$3269
Expenses Count	7

3. The expense is added to the XMC Report.



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<input type="checkbox"/>	Prince Charming	Commissioner of Agriculture and Commerce	Jun 29 2015	Downtown Disney	DSA
<input type="checkbox"/>	Snow White	Commissioner of Insurance	Jun 29 2015	Downtown Disney	DSA

Select All

4. Click the **(Save Report)** button when you are finished.

Importing Expenses with XMC

When you have an XMC report created, use it to import expenses from multiple clients at one time. This option is available on the Mid/End Session, Annual and Termination Reports. The contents of the XMC Report can only be edited in the XMC Reports tab.



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1. When you are filing a report and come to the Expenses Actions section click the (Import XMC) button.

Expenses Actions

Expense Items

The XMC Report cannot be edited at this stage. However, all other expenses added here may be edited.

No Expenses Found

2. Click the [checkboxes] that correspond with the XMC Reports to import and submit with the Report you are filing.

Import XMC Report Expenses

The following XMC Reports (Multi-Client Expense Reports) are available to Import for the Current Client - '**TK Testing Company One**'. Please select the XMC Reports you would like to Import and Submit with the - '**Lobbyist Annual Report**'.

<input checked="" type="checkbox"/> All	FilingDesc	ReportStatus	CreateDate
<input type="checkbox"/>	XMC - To test with	Form XMC-Filed	10/22/2015 2:55:29 PM
<input type="checkbox"/>	XMC -Kaeser;;TK Testing Company One;Dorger Software Archtects, Inc.	Form XMC-Filed	9/16/2015 1:32:53 PM
<input type="checkbox"/>	XMC -Kaeser;;TK Testing Company One;TK Testing Inc Two	Form XMC-Filed	8/31/2015 9:15:47 PM

3. Click the (**Next**) button.



DELBERT HOSEMANN
Secretary of State

Expenses Actions

Expense Items
The XMC Report cannot be edited at this stage. However, all other expenses added here may be edited.

Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input type="checkbox"/> XMC Reipients	Other	Oct 28 2015	XMC Report	XMC Report	Other	Items Attached	\$653.80

Select All

Total Value/Cost	\$653.8
Expenses Count	1

- The XMC Reports that you selected will be added as a line item in the Expenses Actions. XMC Reports cannot be edited at this stage. Expenses entered via the **(Add Expenses)** button or Imported from a spreadsheet can be edited here.

Report Actions

- When finished with the report you may click the **(Preview Report)** button before submitting.

 DELBERT HOSEMANN Secretary of State	OFFICE OF THE MISSISSIPPI SECRETARY OF STATE, C. Delbert Hosemann, Jr. Itemized Expenditures Benefiting Multiple Clients - Extension for "A" or "E"	FORM XMC
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- Scroll to the bottom of the report to see the Form XMC is attached.