Michael Watson
SECRETARY OF STATE

Mississippi Secretary of State

The Lobbying Online Reporting System

Client User Guide

Michael Watson
SECRETARY OF STATE

Table of Contents

Click on the table of contents item you want to view to be taken directly to it

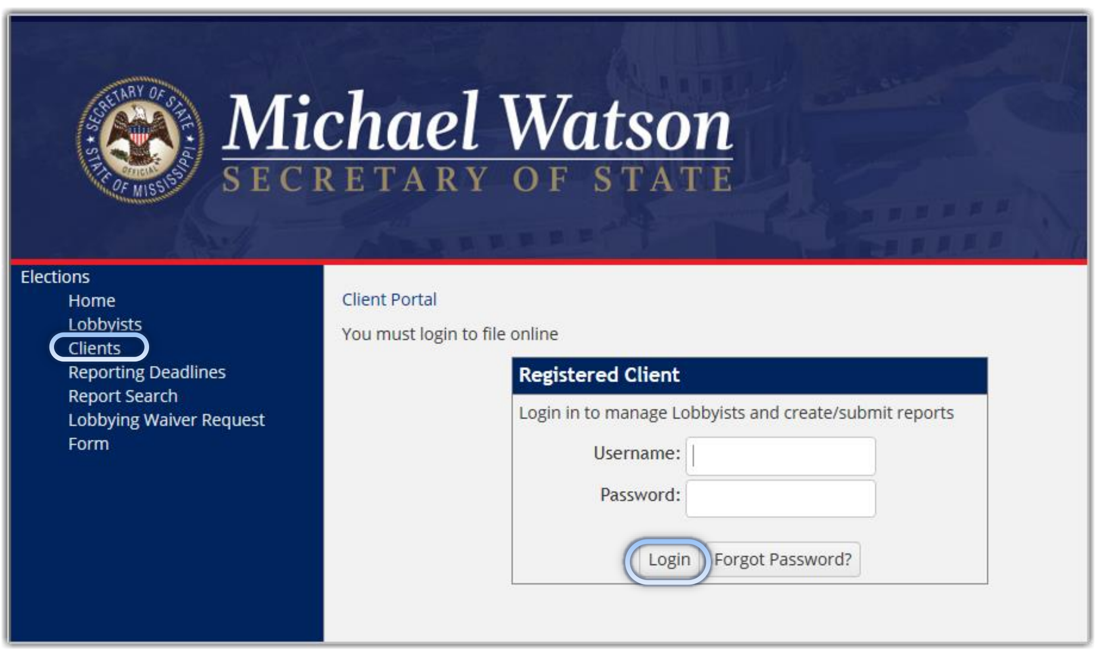
Logging in as a Client

While you can search for reports without logging in to the Web Portal, you must log in to submit filings.

To log in to the Web Portal, you must be a registered user and your lobbyist will register you.

1. In your web browser, go to
https://sos.ms.gov/elec/portal/msel2/page/onlineFiling/portal.aspx
The Elections home page displays.

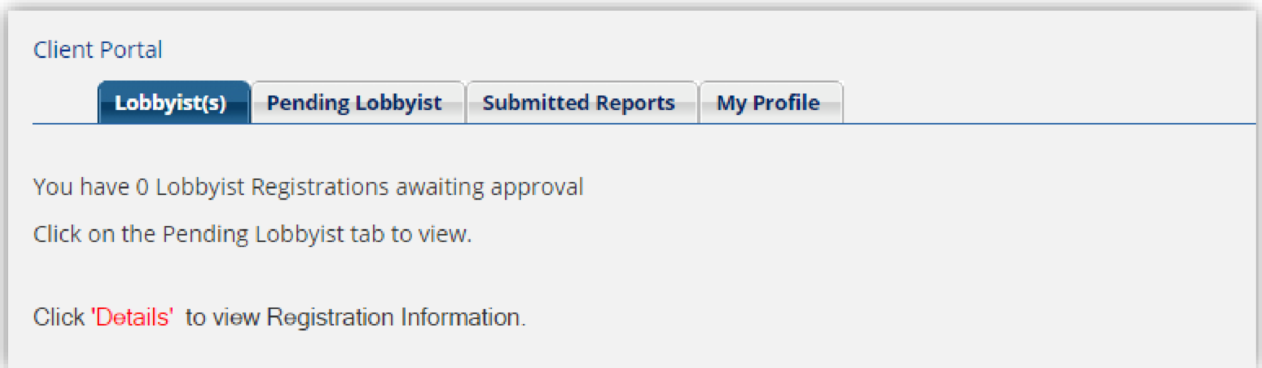
2. Click the **Clients** link on the left side of the page.
3. The *Registered Client* login screen displays.
4. Enter your Username and Password.
    a. *Your Username and Password were emailed to you when your lobbyist registered you as a client.*
5. Click the **(Login)** button.
6. This will bring you to the *Client Portal* home screen.



Top of the Document

Tabs

Notice the tabs across the upper portion of the Client Portal screen.



Clicking on the tabs takes you to different parts of the site.

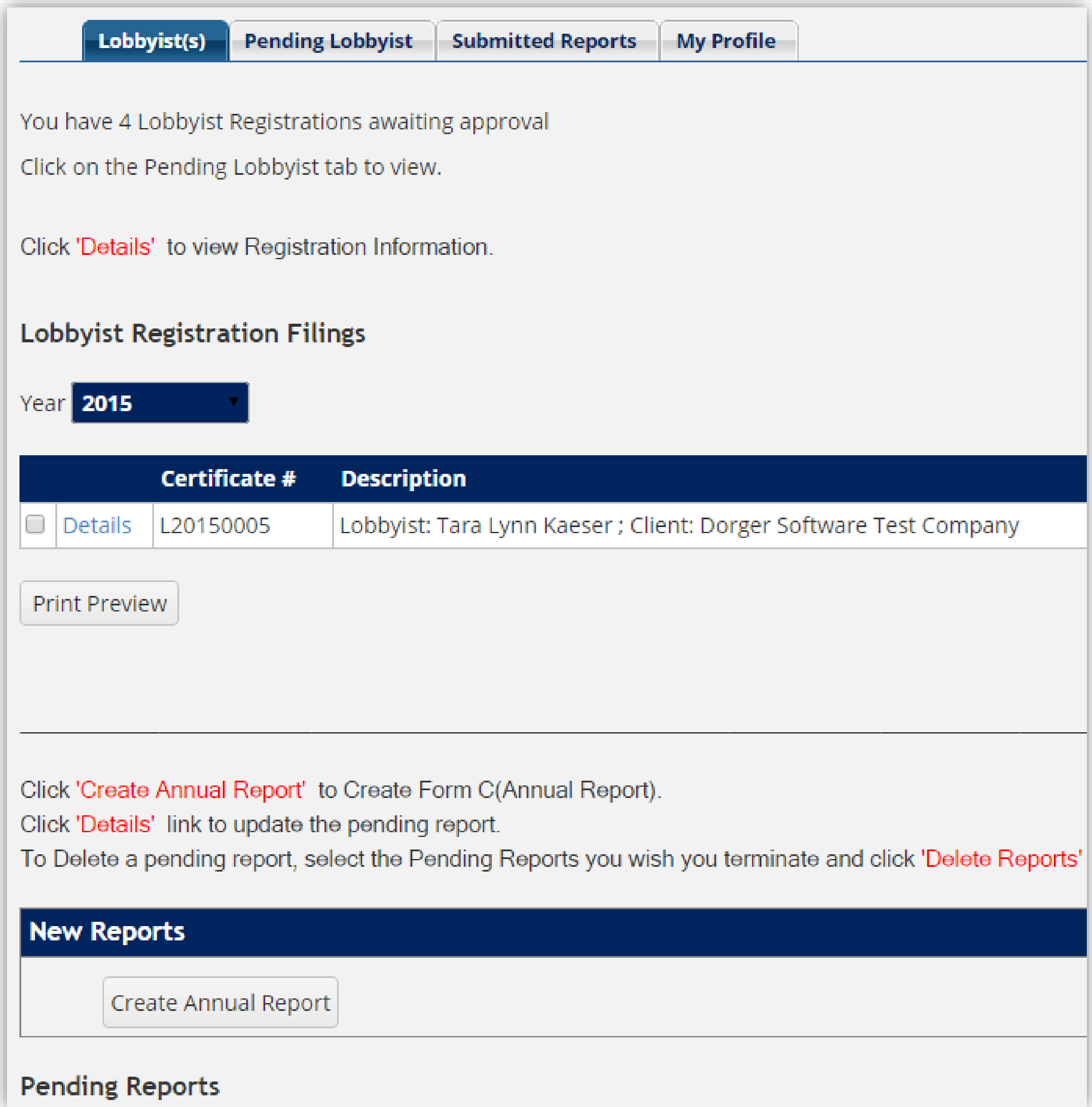
Here you may navigate between:

- Lobbyists
- Pending Lobbyist
- Submitted Reports
- My Profile

Top of the Document

Lobbyist(s) Tab

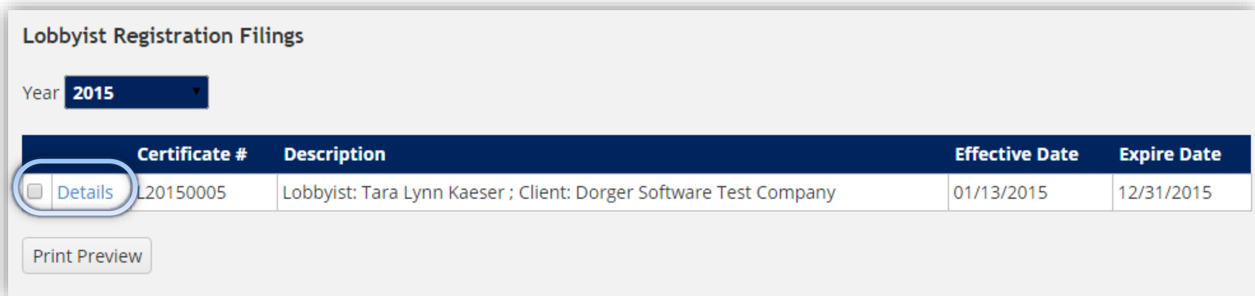
The Lobbyist(s) tab is the default tab that you come to after logging in as a Client.



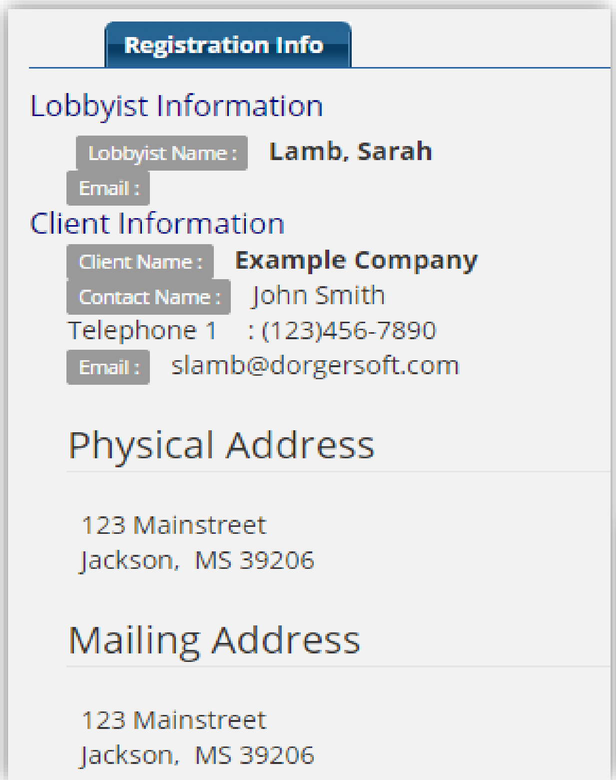
Here you may view and create *Annual Reports* and view your *Lobbyist's Registration Filings*.

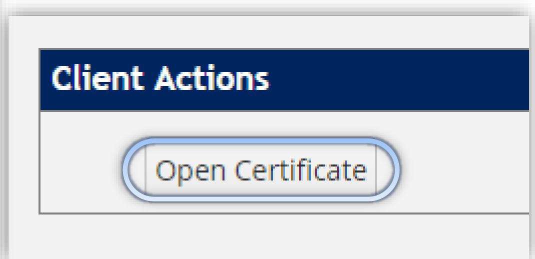
View Lobbyist Registration Filings

1. Choose a year from the dropdown menu to display that years filing.



2. Click the [Details](#) Link to go to a screen that shows lobbyist and client Registration Information.

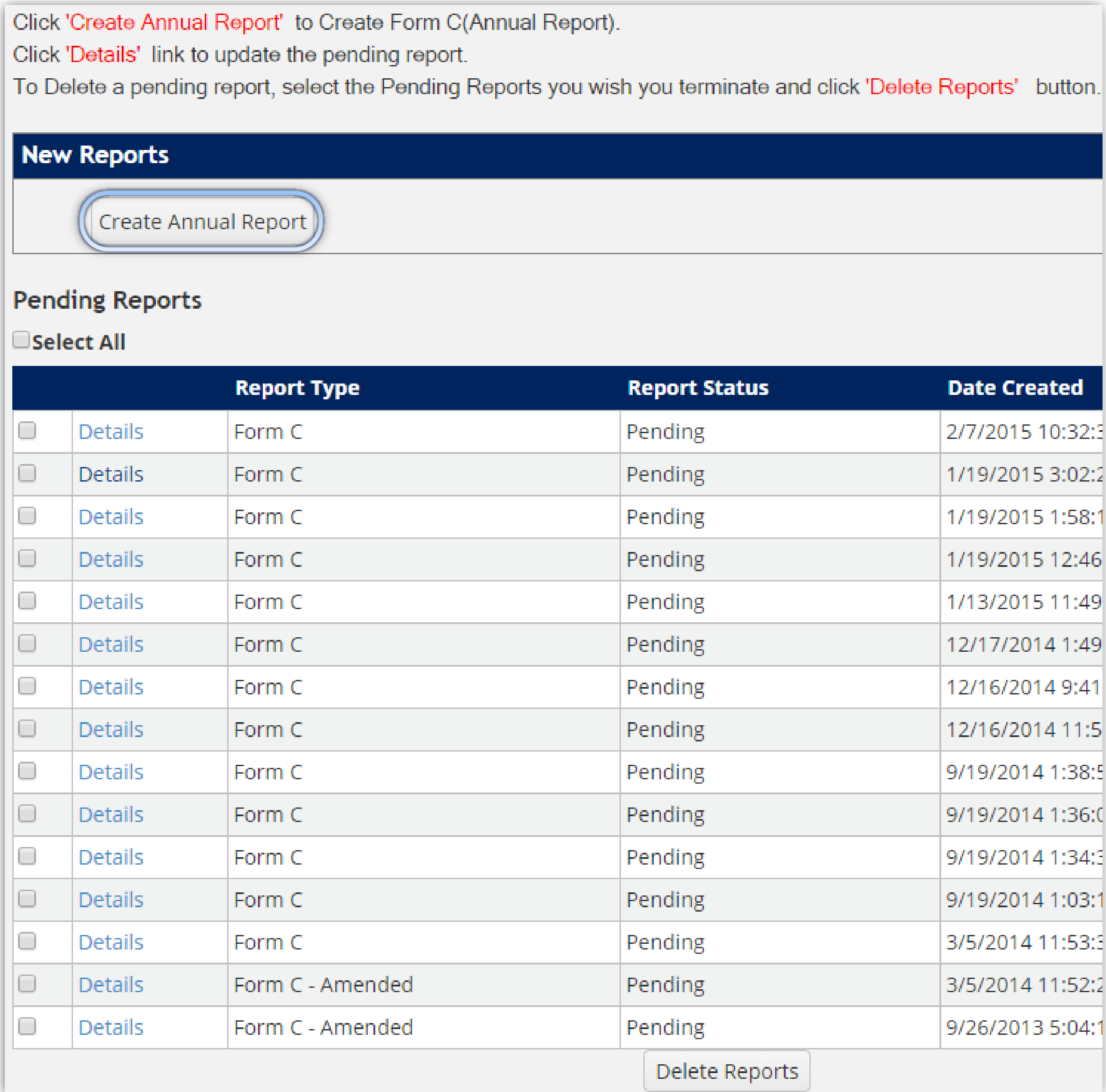




3. At the bottom of that screen you will see a Client Actions Box. In the Client Actions box click on the **(Open Certificate)** button to see the *Lobbyist's Registration* Form.

Create an Annual Report

1. Click on the **(Create Annual Report)** button.



Click 'Create Annual Report' to Create Form C(Annual Report).
Click 'Details' link to update the pending report.
To Delete a pending report, select the Pending Reports you wish you terminate and click 'Delete Reports' button.

New Reports

Create Annual Report

Pending Reports

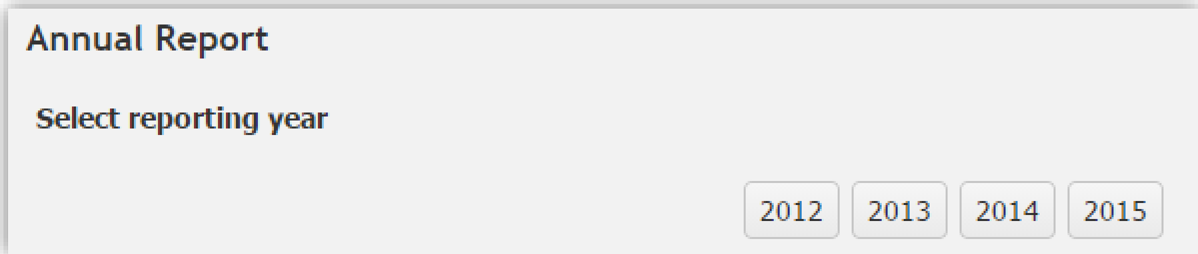
Select All

		Report Type	Report Status	Date Created
☐	Details	Form C	Pending	2/7/2015 10:32:3
☐	Details	Form C	Pending	1/19/2015 3:02:2
☐	Details	Form C	Pending	1/19/2015 1:58:1
☐	Details	Form C	Pending	1/19/2015 12:46
☐	Details	Form C	Pending	1/13/2015 11:49
☐	Details	Form C	Pending	12/17/2014 1:49
☐	Details	Form C	Pending	12/16/2014 9:41
☐	Details	Form C	Pending	12/16/2014 11:5
☐	Details	Form C	Pending	9/19/2014 1:38:5
☐	Details	Form C	Pending	9/19/2014 1:36:0
☐	Details	Form C	Pending	9/19/2014 1:34:3
☐	Details	Form C	Pending	9/19/2014 1:03:1
☐	Details	Form C	Pending	3/5/2014 11:53:3
☐	Details	Form C - Amended	Pending	3/5/2014 11:52:2
☐	Details	Form C - Amended	Pending	9/26/2013 5:04:1

Delete Reports

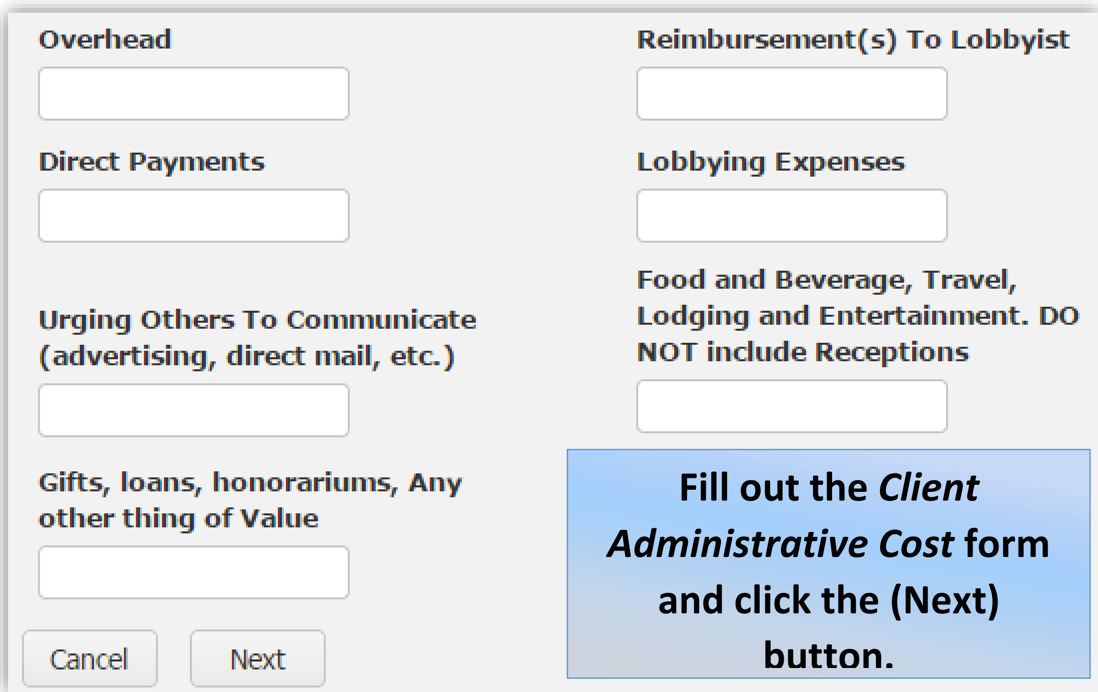
(Here you may also continue filing Pending Reports by clicking the Details link that corresponds with the Form that you would like to continue filing. Clicking the [checkbox] that corresponds with the form will select it, if the form needs to be deleted you may then click the ***(Delete Reports)*** *button at the bottom of the page.)*

2. Click on the button that corresponds with the reporting year you wish to create a report for.



3. The next screen will be the *Form C – Client Annual Report*.
4. At the top is the *Client Administrative Costs*.

5. To edit or add to these costs click the **(Add/Edit Admin Costs)** button.
6. This will take you to a *Client Administrative Cost* form.

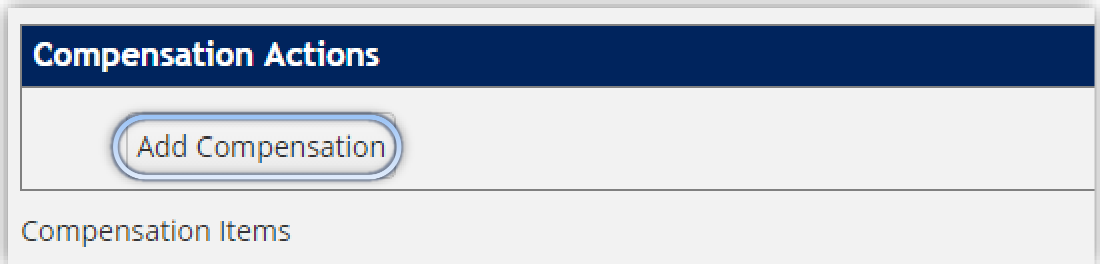


7. After you click **(Next)** the *Form C – Client Annual Report* screen comes back with your changes added to the *Client Administrative Costs* section.

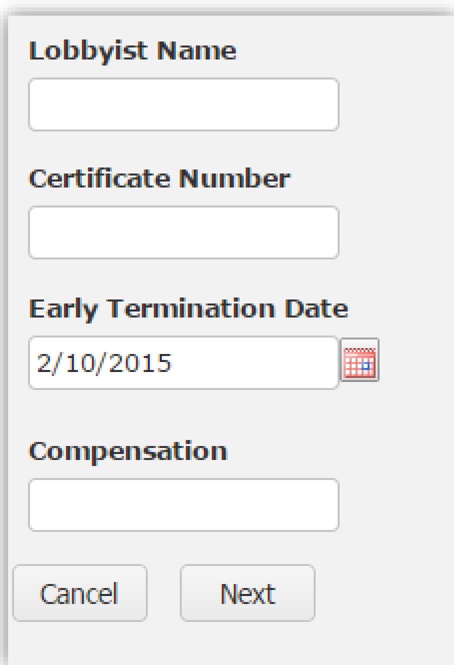
Top of the Document

Compensation Actions

Here you may Add Compensation, Edit Compensations, and Delete Compensations.

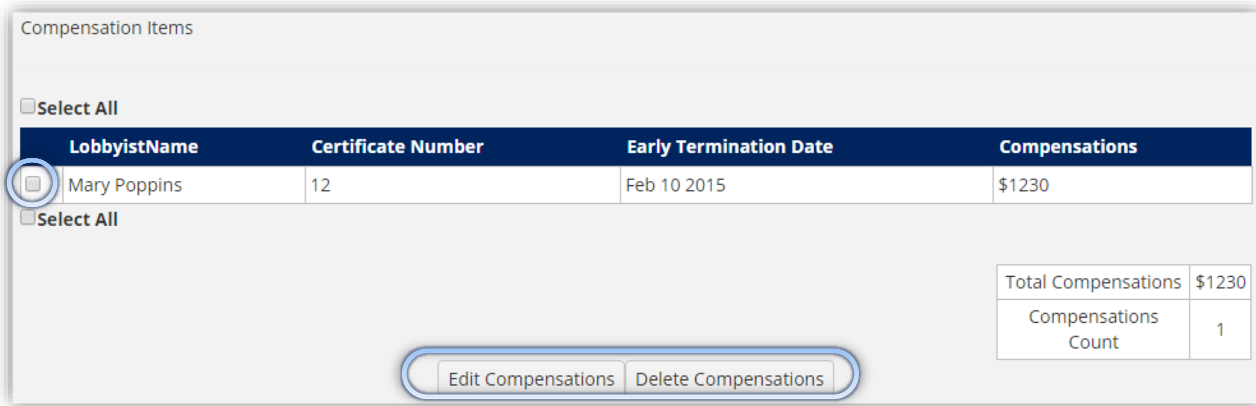


1. Click the **(Add Compensation)** button.
2. Next a *Client Lobbyist Compensations* form will appear.



Fill out the form and click the (Next) button.

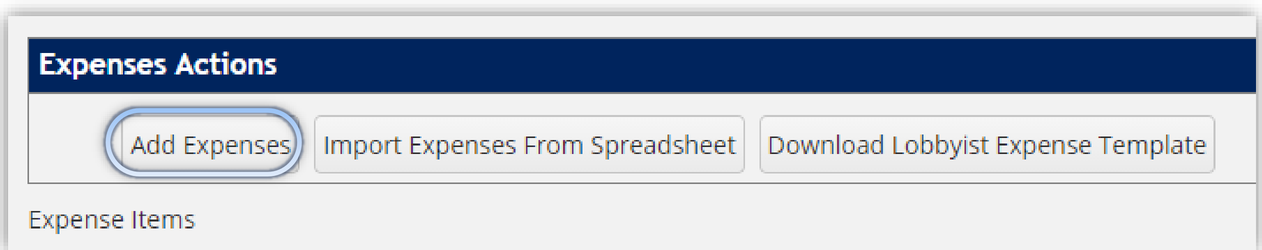
3. Next you will be brought back to the *Form C – Client Annual Report* screen with your new Compensation added.



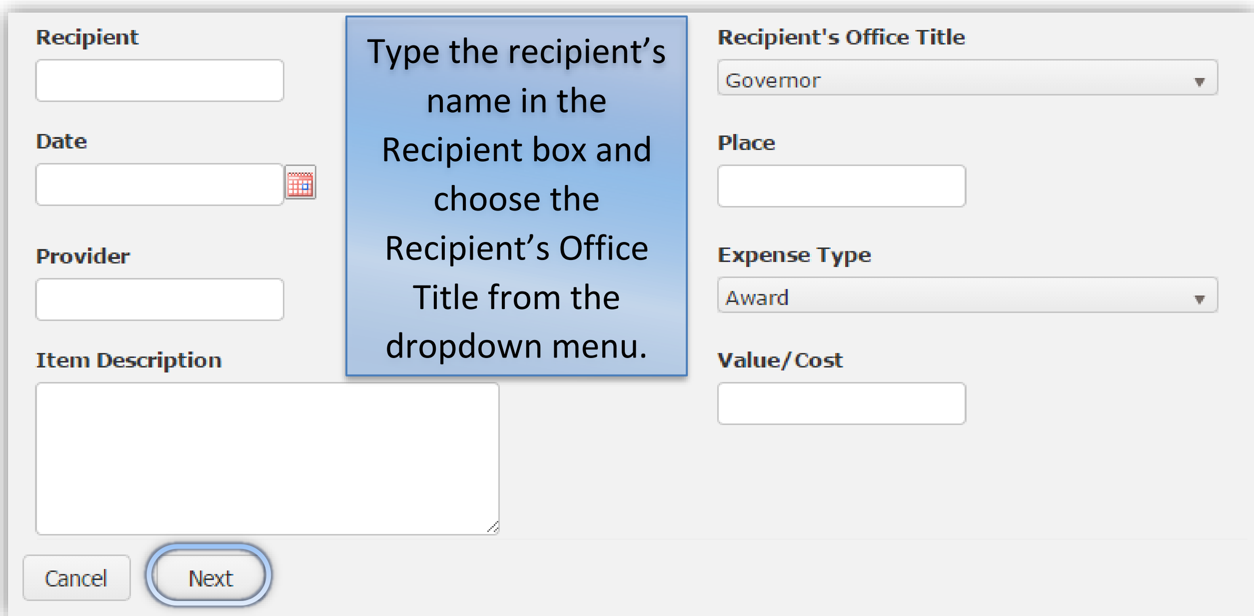
4. If the information in a compensation item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the compensation you need to edit and click the **(Edit Compensation)** button to go back to the *Client Lobbyist Compensations* form.
5. To delete a compensation click the [checkbox] that corresponds with the compensation item you need to delete and click the **(Delete Compensations)** button.

Expenses Actions

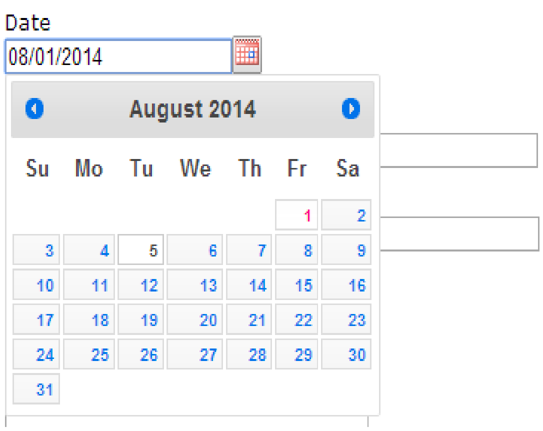
Here you may either add expenses directly or Import Expenses from Spreadsheet. In order to import expenses from spreadsheet you will need to have the *Lobbyist Expense Template* downloaded from the Lobbyists tab.



1. To add expenses manually click the **(Add Expenses)** button to be taken to a *Lobbying Expenditure* screen.



Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.



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

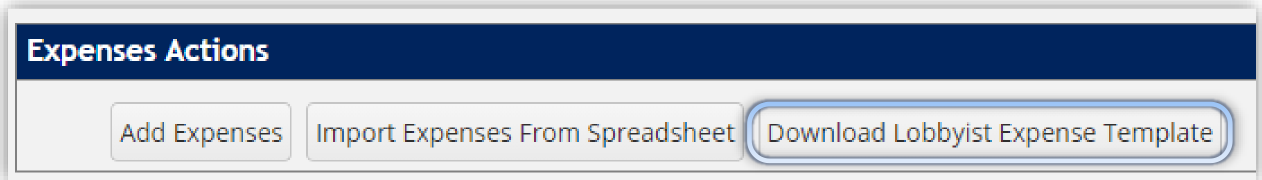
2. When all of the required fields are filled out click the **(Next)** button to be taken back to the *Form C – Client Annual Report screen*.

Import Expenses from Spreadsheet

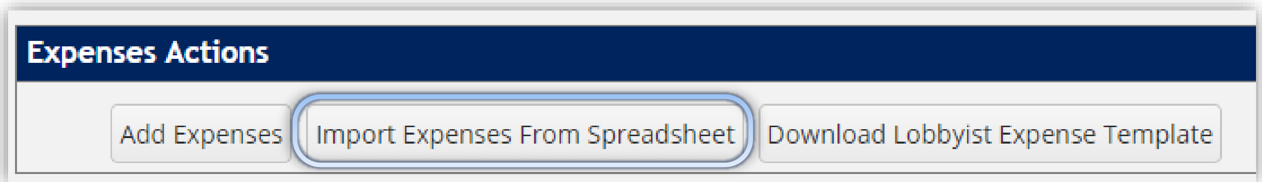
To upload expenses using a spreadsheet you will need to download and use the Lobbyist Expense Template.

Top of the Document

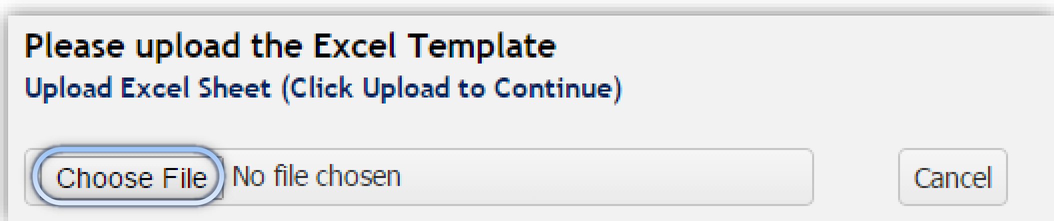
1. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template may be downloaded from the Expenses Actions.



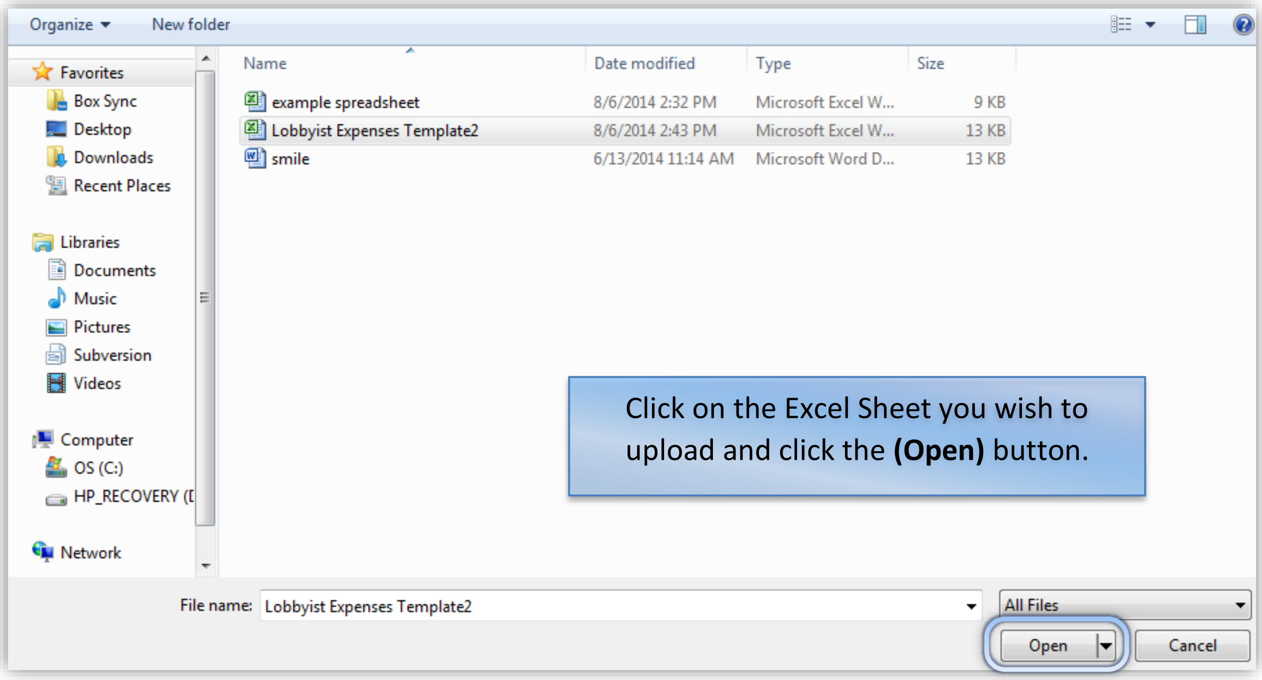
2. You may Import Expenses from a Spreadsheet by clicking on the **(Import Expenses From Spreadsheet)** button.



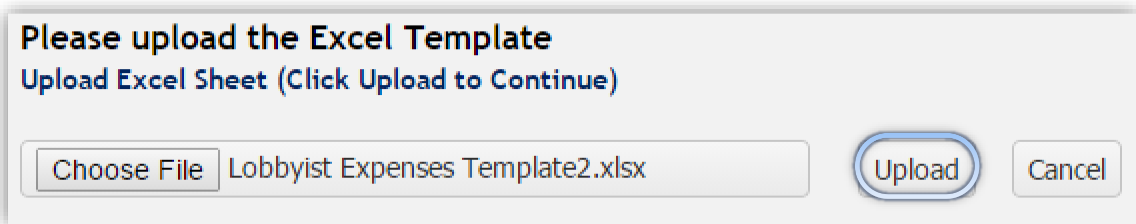
3. Next you will come to a screen where you may choose a file from your computer.



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

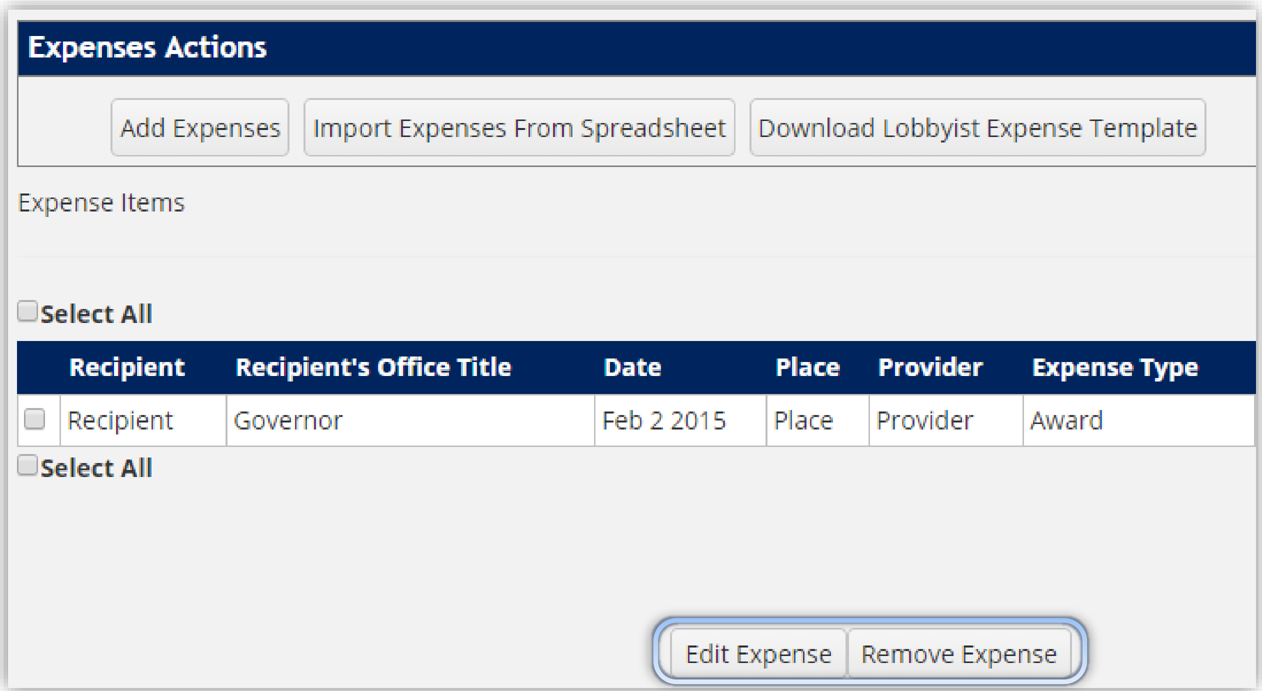


Next you should see the file you opened in the ***Choose File*** box and an **(Upload)** button has appeared.



5. Click the **(Upload)** button to import your Excel Sheet.
6. Next you will be brought back to the Form C – Client Annual Report screen.

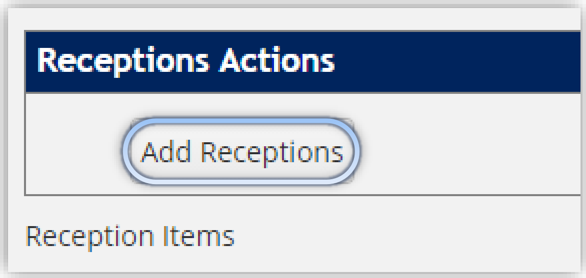
Top of the Document

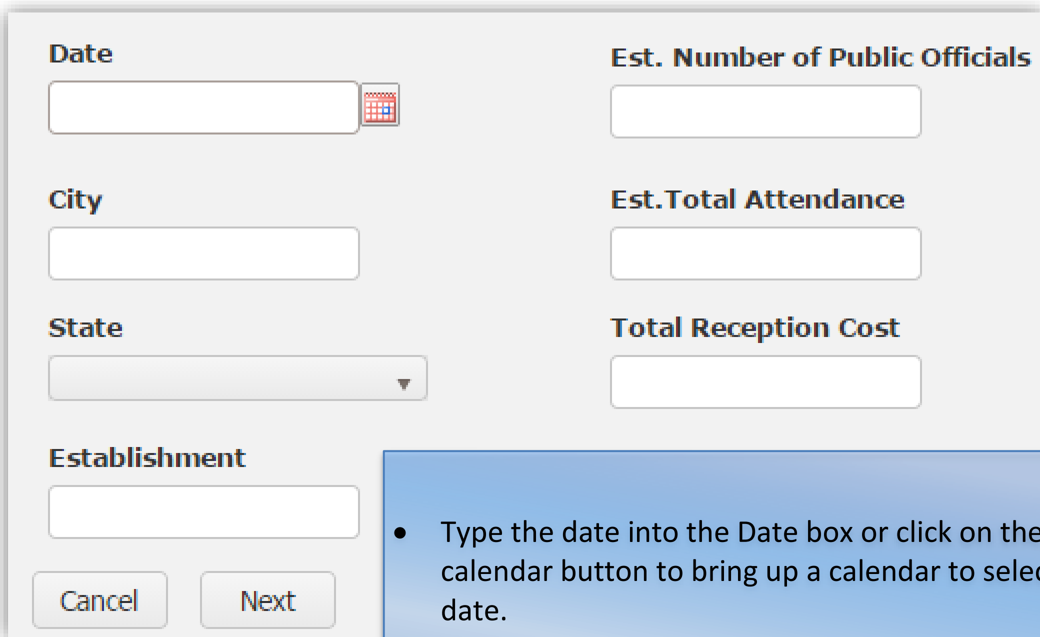


7. If the information in an Expense item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the Expense item you need to edit and click the **(Edit Expense)** button to go back to the *Lobbying Expenditure* form.
8. To delete an Expense item click the [checkbox] that corresponds with the expense item you need to delete and click the **(Remove Expense)** button.

Receptions Actions

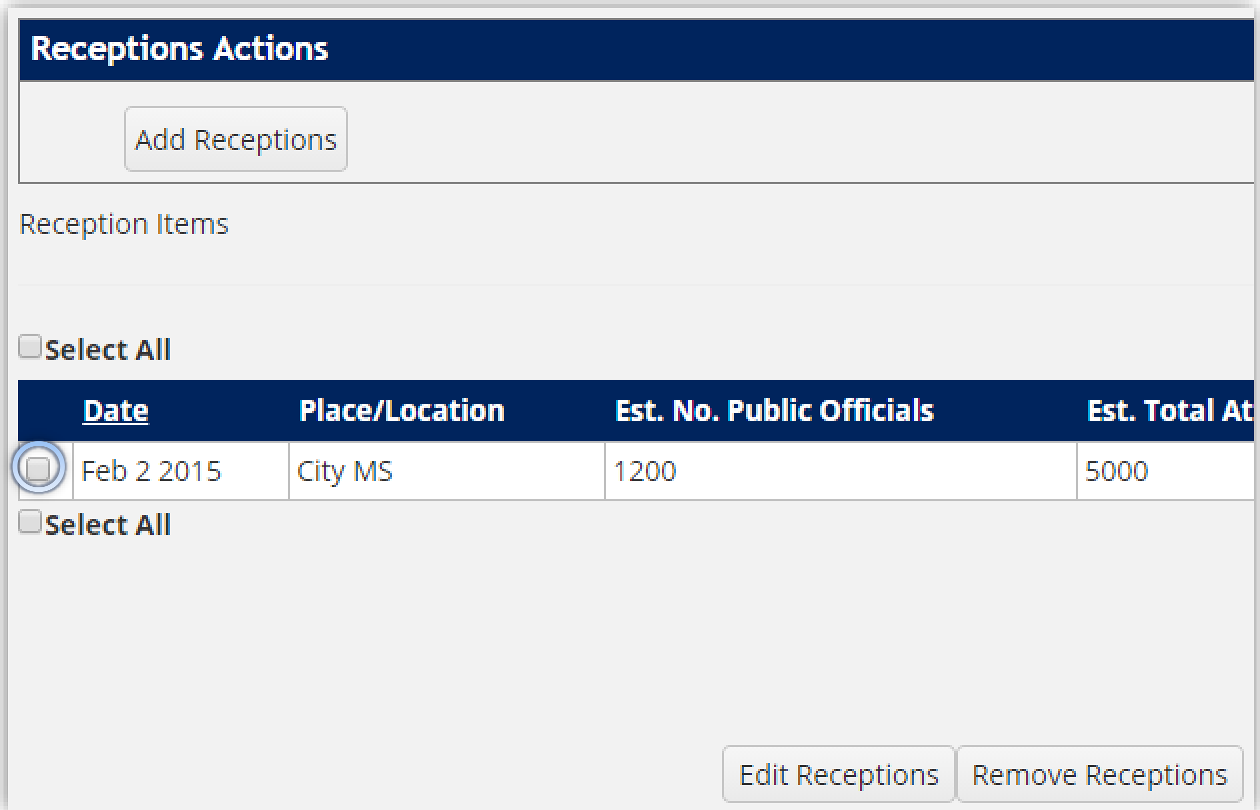
1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.





- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- Fill in the rest of the boxes
- Click the **(Next)** button when you are finished.

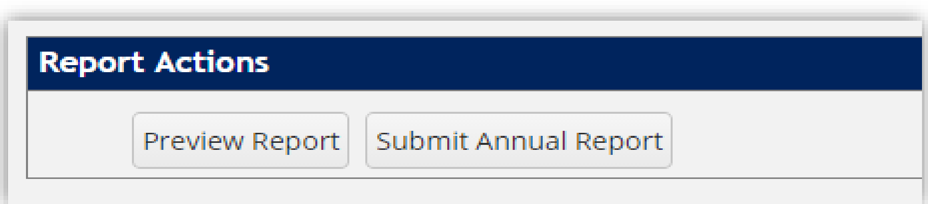
2. After you click the **(Next)** button you will be taken back to the Form C – Client Annual Report screen that shows your newly entered Reception Action.



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.

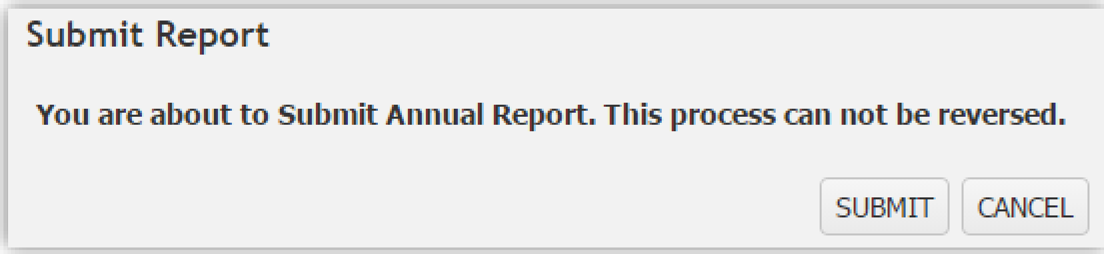
Report Actions

You may see a preview of the Annual Report by clicking the **(Preview Report)** button.

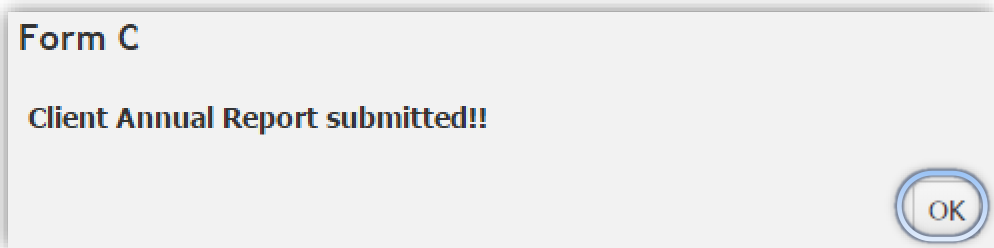


1. When the report is complete click the **(Submit Annual Report)** button.
2. Once the report is submitted the process cannot be reversed.

Top of the Document



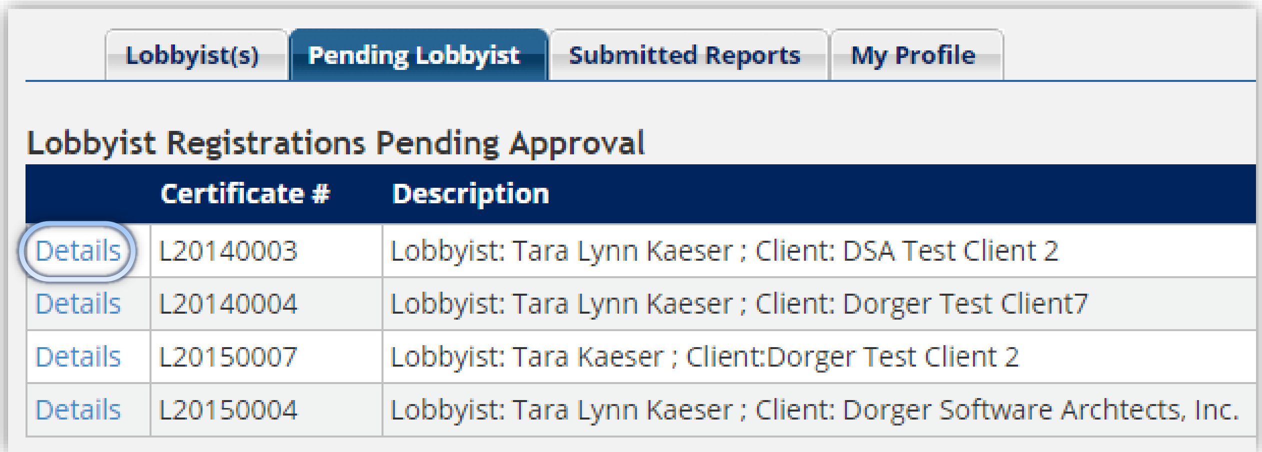
3. Click the **(SUBMIT)** button.



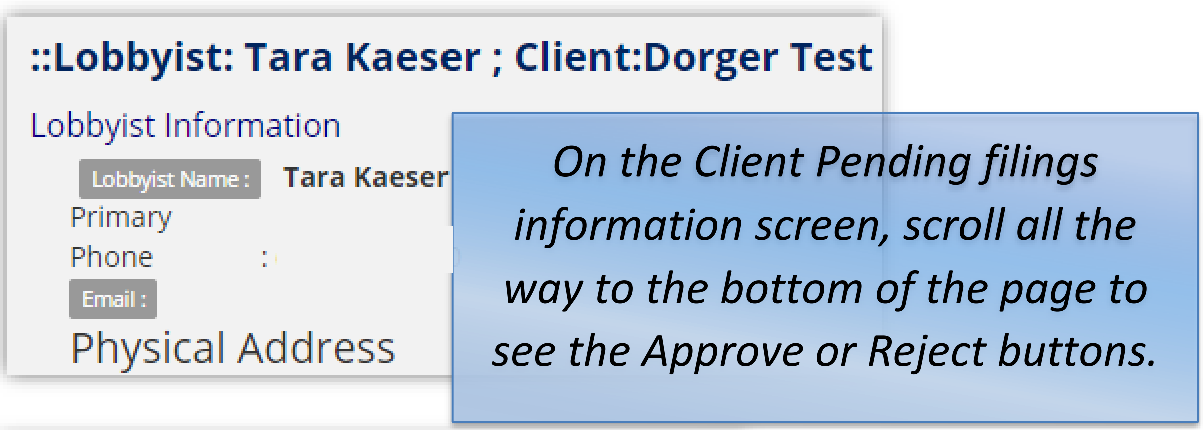
4. Click the **(OK)** button to finish and you will be directed to the *Submitted Reports* tab.

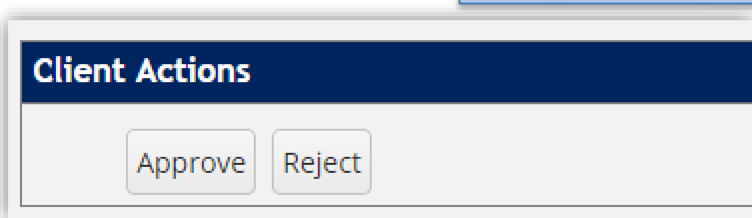
Pending Lobbyist Tab

1. Here you may view Lobbyist Registrations that are pending approval.



2. Click the Details link to approve or reject the Lobbyist Registrations.

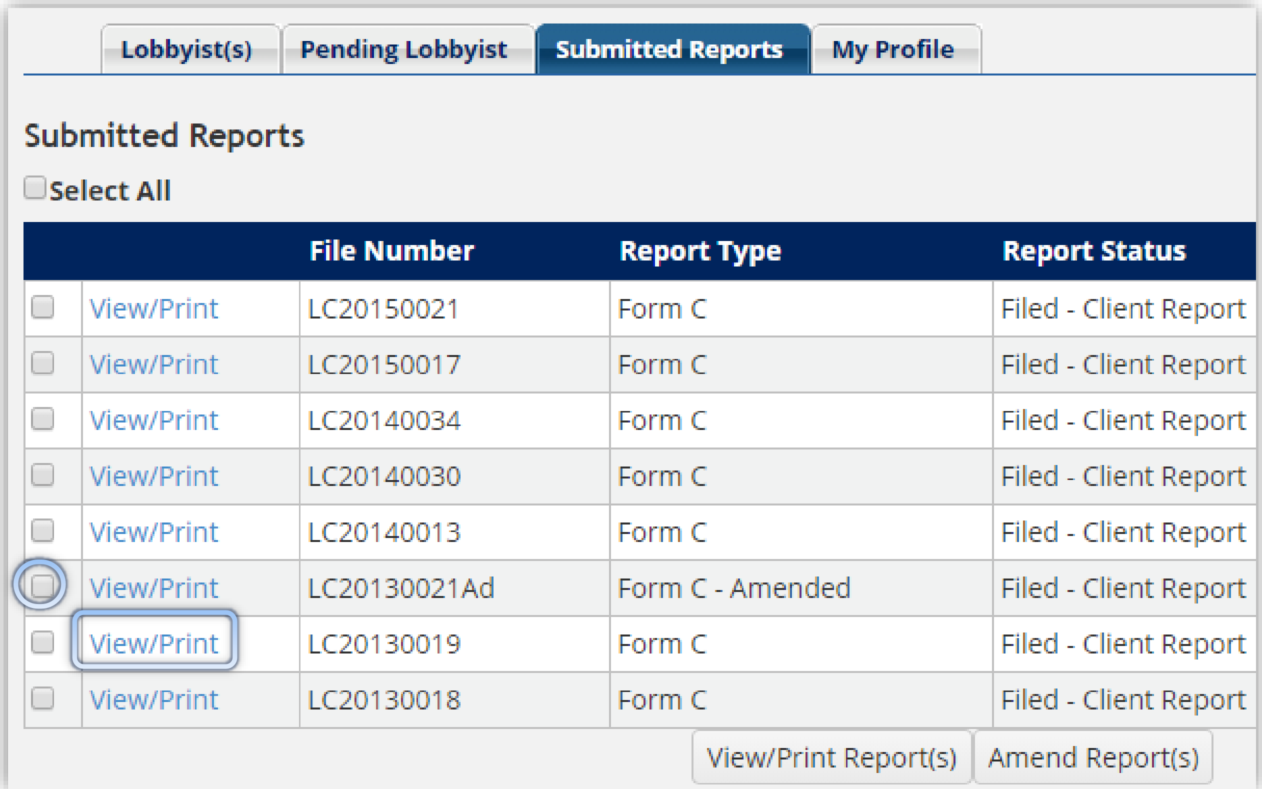




3. Here you may either click the **(Approve)** button to approve the Lobbyist Registration or click the **(Reject)** button to reject it.

Submitted Reports Tab

In the Submitted Reports tab you may View, Print or Amend Reports.



Lobbyist(s) | Pending Lobbyist | Submitted Reports | My Profile

Submitted Reports

Select All

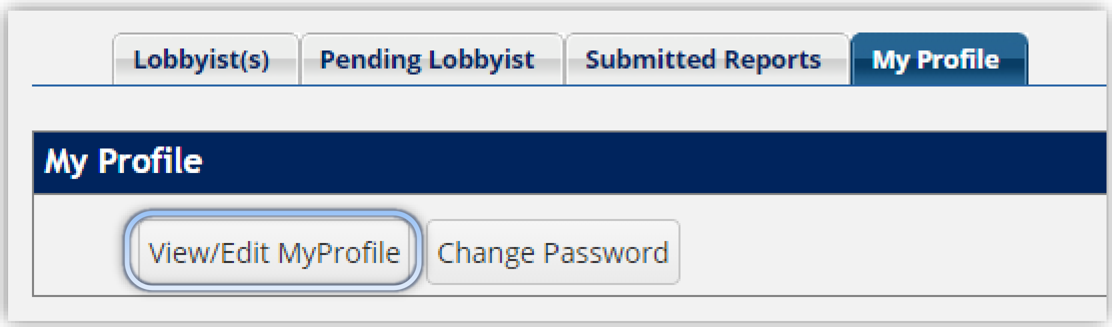
		File Number	Report Type	Report Status
☐	View/Print	LC20150021	Form C	Filed - Client Report
☐	View/Print	LC20150017	Form C	Filed - Client Report
☐	View/Print	LC20140034	Form C	Filed - Client Report
☐	View/Print	LC20140030	Form C	Filed - Client Report
☐	View/Print	LC20140013	Form C	Filed - Client Report
☐	View/Print	LC20130021Ad	Form C - Amended	Filed - Client Report
☐	View/Print	LC20130019	Form C	Filed - Client Report
☐	View/Print	LC20130018	Form C	Filed - Client Report

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

- Click the [checkbox] corresponding with the report you want to use
- Once the [checkbox] is checked you may click the **(View/Print Report(s))** button to bring up a printable version of the report. You may also click the **(Amend Report(s))** button to open the report for editing.
- The **View/Print** link can also be click in order to bring up a printable version of the report.

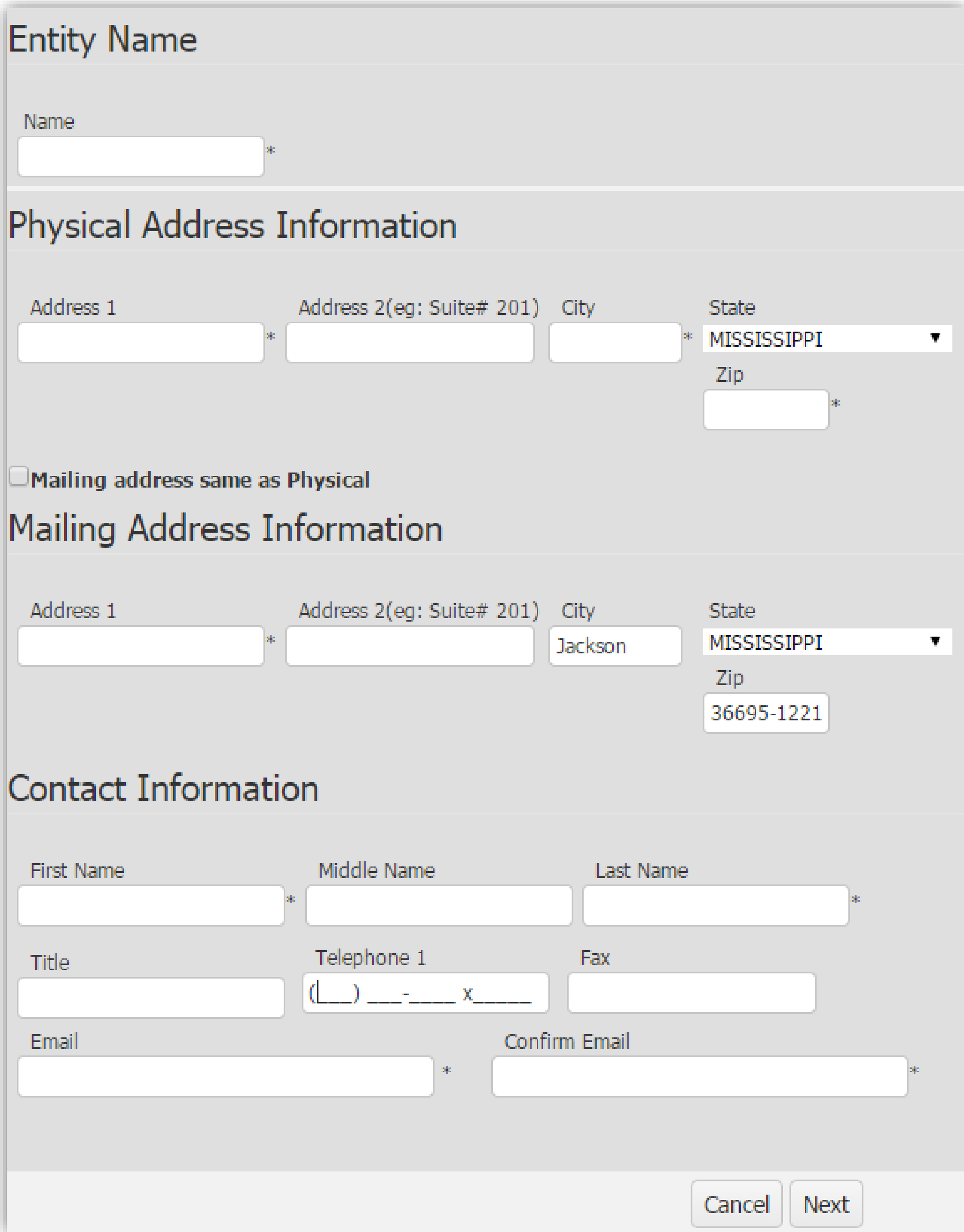
Top of the Document

My Profile Tab



- Here you may click on the **(View/Edit My Profile)** button to view and change your profile.
- You will be directed to a form where you man change your name, physical/mailing address, and contact information.

Top of the Document


Entity Name

Name
*

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 Jackson | State MISSISSIPPI | Zip 36695-1221

Contact Information

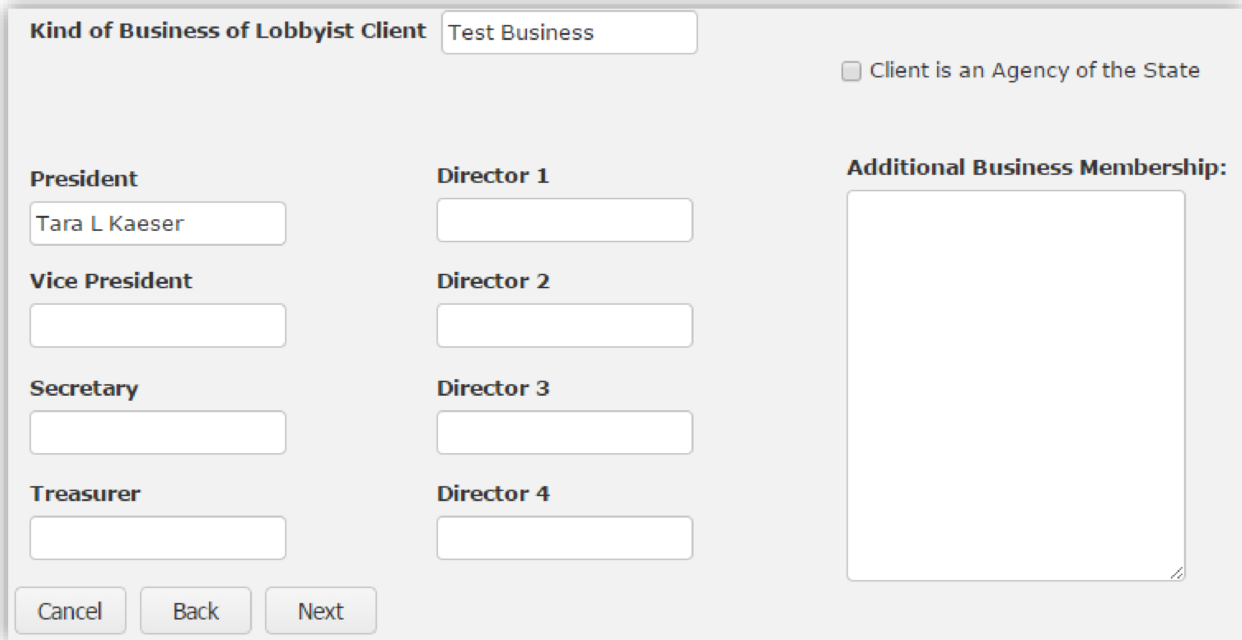
First Name * | Middle Name | Last Name *

Title | Telephone 1 (___) ___-____ x_____ | Fax

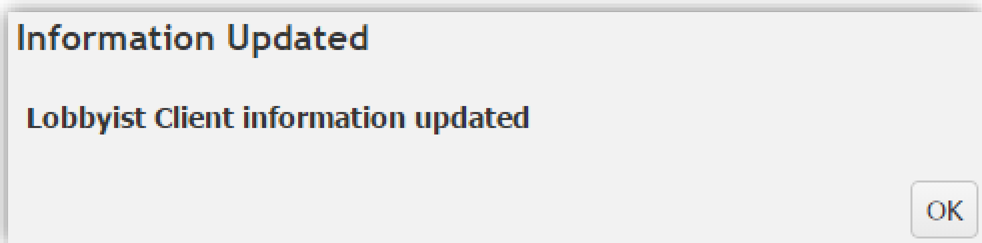
Email * | Confirm Email *

Cancel | Next

- Click the **(Next)** button when you have filled out the form.



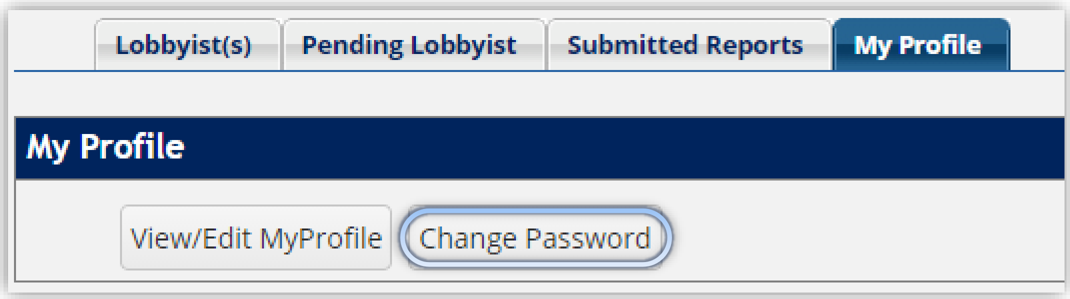
- Click the **(Next)** Button to update the information.



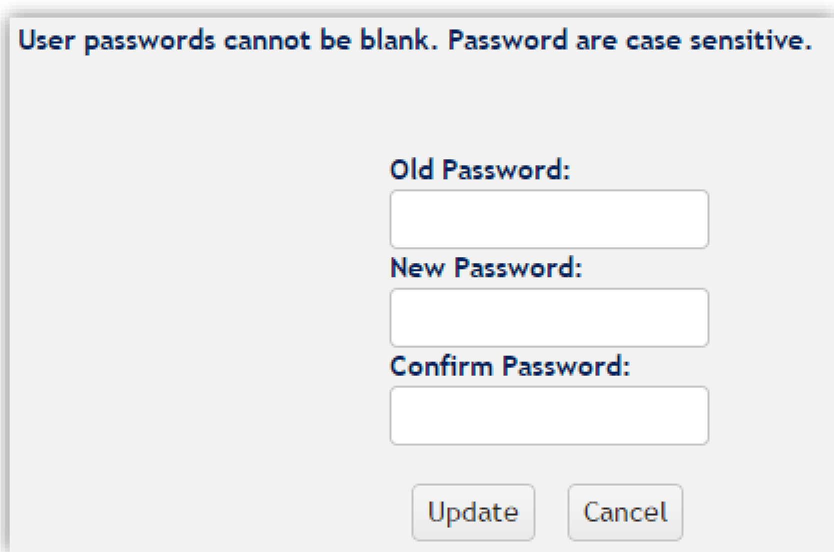
- Click the **(OK)** button.

Top of the Document

Change Password



- When you need to change your password for any reason click the **(Change Password)** button.



- Enter your old password in the top '*Old Password*' box
- Enter your new password in the middle '*New Password*' box
- Enter your new password again in the bottom '*New Password (Confirm)'* box
- Click the **(Update)** button.