Michael Watson
SECRETARY OF STATE

Mississippi Secretary of State

Star Web Portal

Lobbyist User Guide

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Introduction

The STAR Web Portal 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 Web Portal, you must log in to submit filings.

To log in to the Web Portal, you must be a registered user.

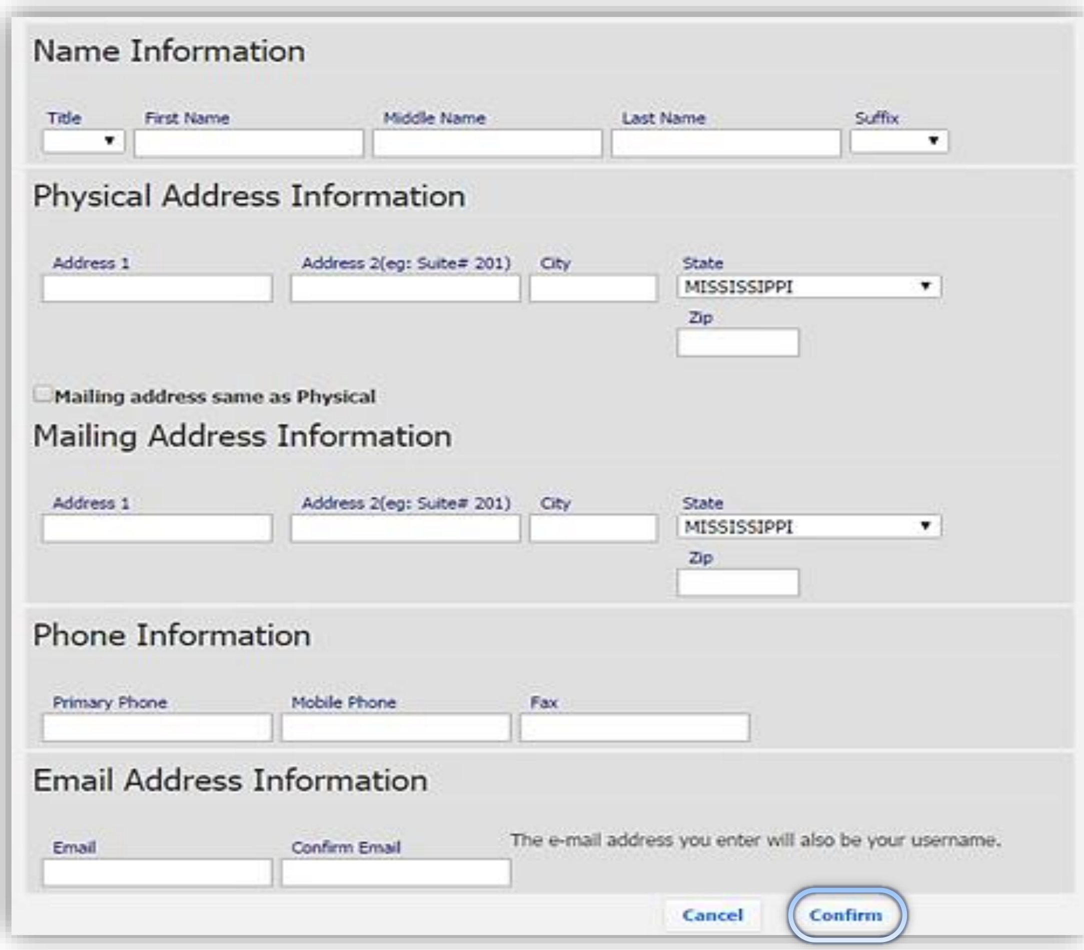
1. In your web browser, go to https://sos.ms.gov/elec/portal/msel2/page/onlineFiling/portal.aspx
   The Elections home page displays.

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

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.

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.

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



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.

The address you entered could not be validated!

Name Information

Title: Ms. | First Name: Sarah | Middle Name: | Last Name: Lamb | Suffix:

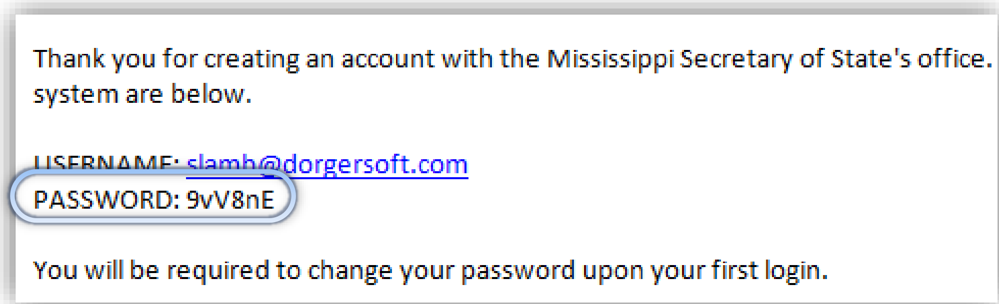
Physical Address Information

Address 1: 913 Central Avenue | Address 2(eg: Suite# 201): 15 | City: Sevierville | State: TENNESSEE | Zip: 37862

The address you entered could not be validated
Check the box to confirm the entered address is correct

If the form comes back with the message "The address you entered could not be validated!" and the address is correct with no errors*, then click on the [checkbox] next to "Check the box to confirm that the entered address is correct," and then click the (**Confirm**) button again.*
An account created screen will come up and next you will need to go to your email.

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.

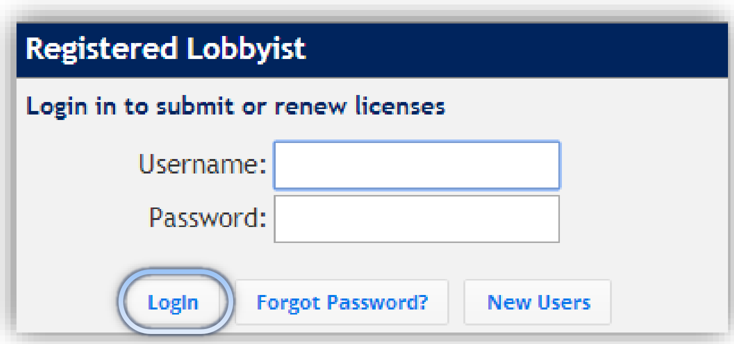


Thank you for creating an account with the Mississippi Secretary of State's office.
system are below.

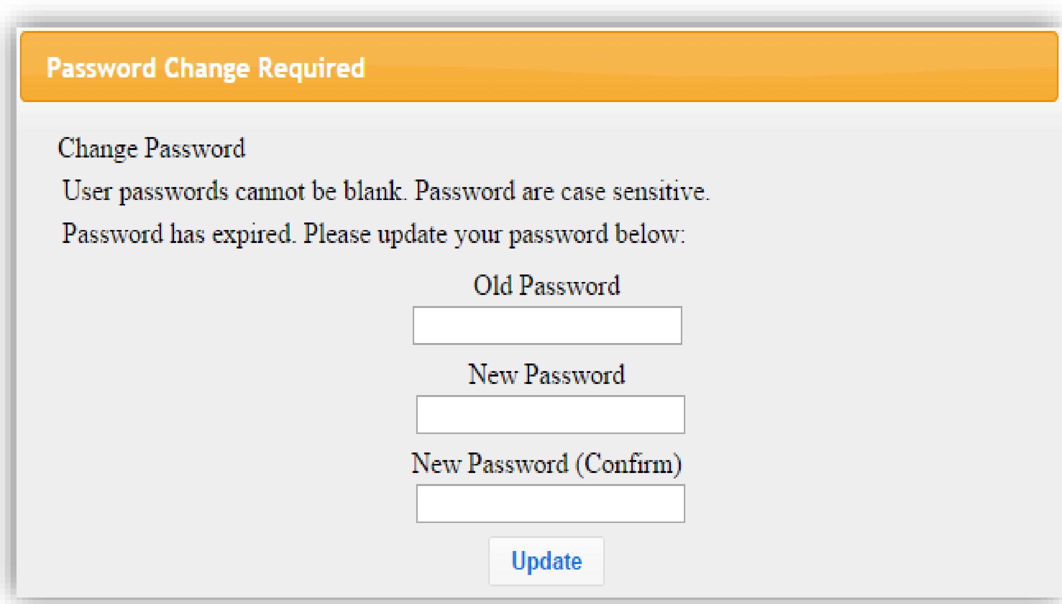
USERNAME: slamb@dorgersoft.com
PASSWORD: 9vV8nE

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

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



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.



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***. If you have more than one client there will be a tab for ***XMC Reports***.

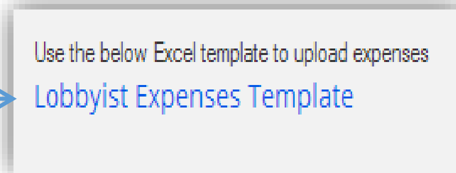
Client(s)

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

Here you may register clients, view current clients, file report, and download the Lobbyist Expenses Template.

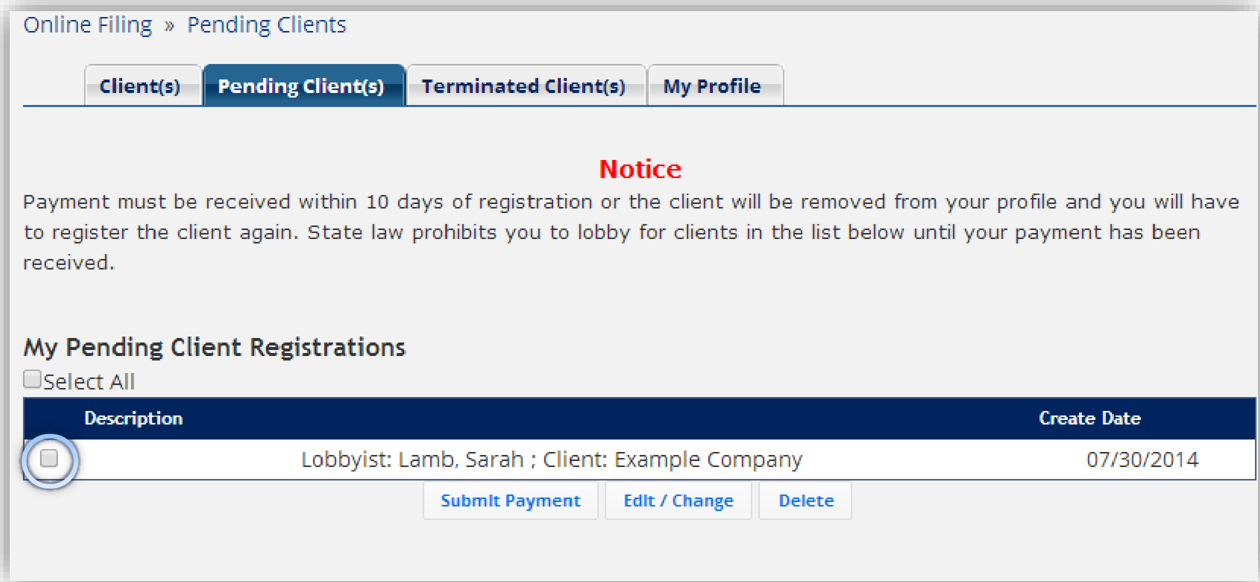
Download this by clicking the link

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



Pending Client(s)

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



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.

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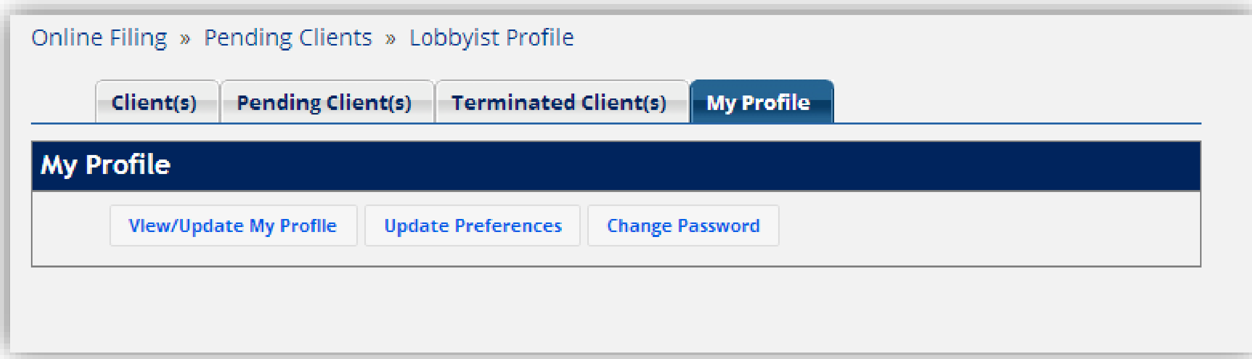
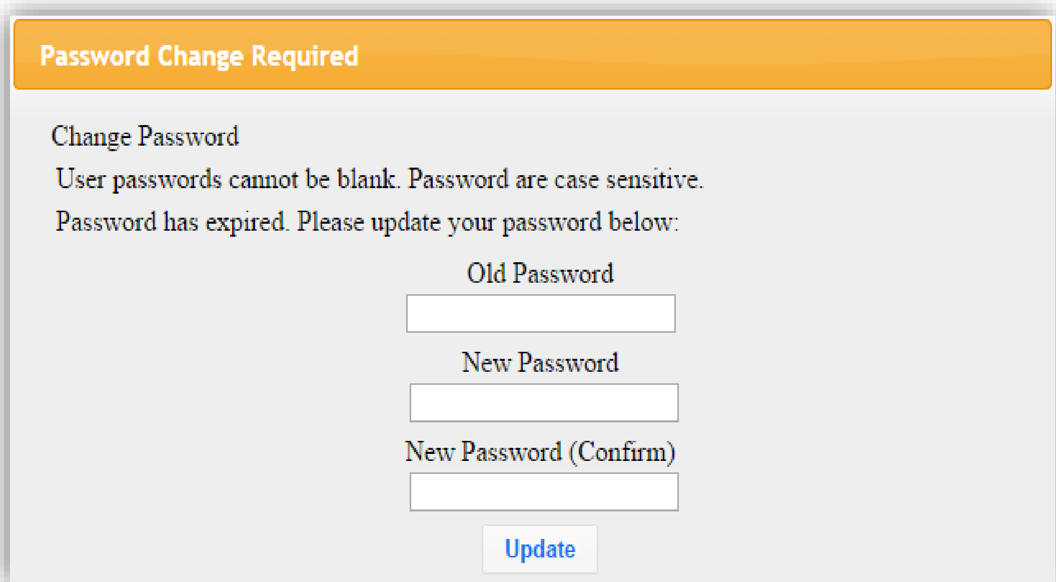
My Profile

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



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.

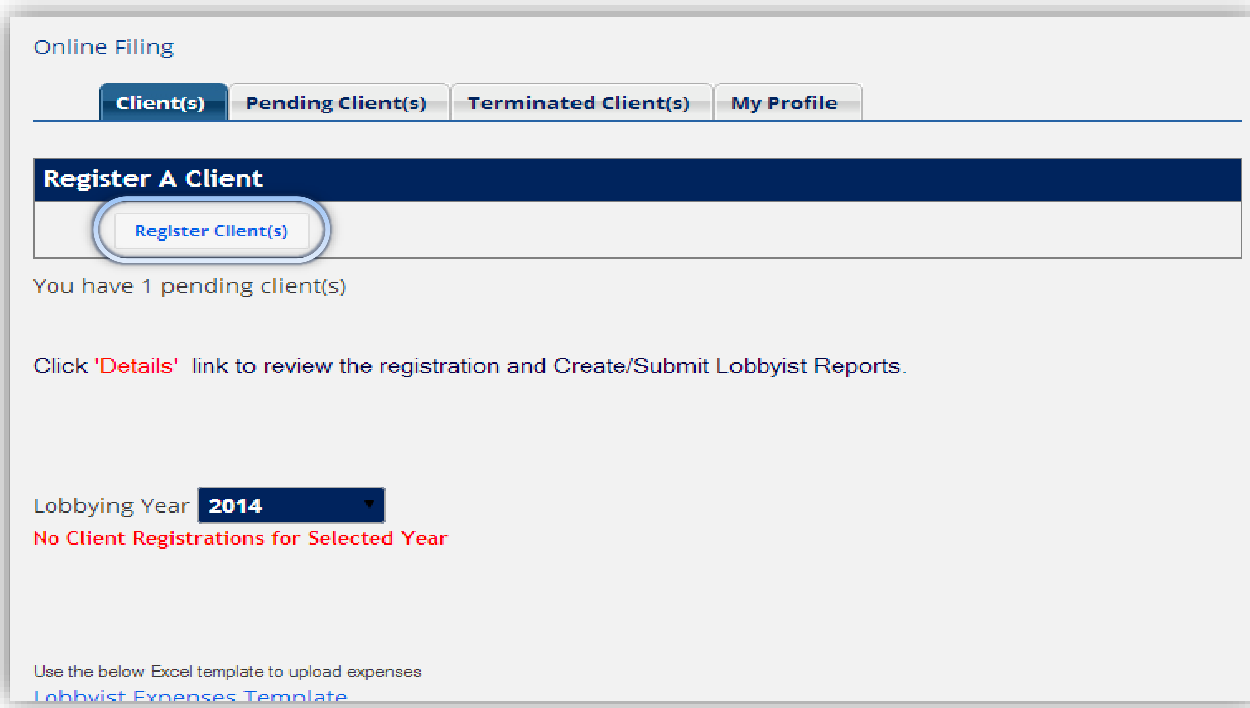


1. Enter your old password into the first box
2. Enter a new password that you create into the second box
3. Enter the new password again into the third box to confirm. *When you enter the new password into the second and third boxes they must match perfectly.*
4. Click the **(Update)** button to complete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

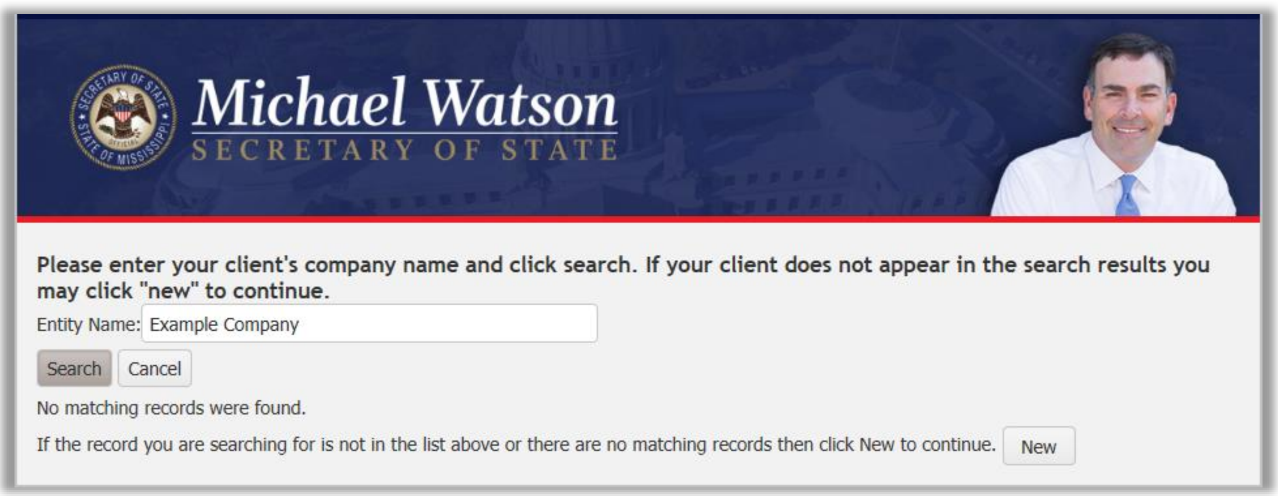
Register a Client

When logged in as a Lobbyist you may register Clients.

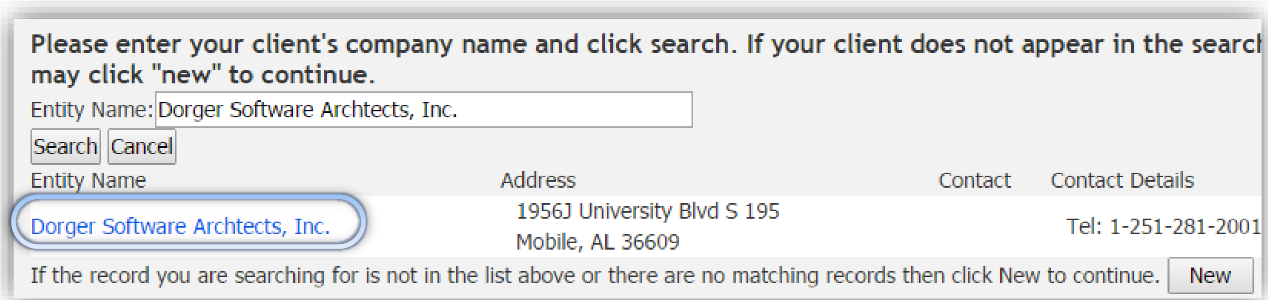
1. Under the ***Client(s)*** tab In the Register A Client box click the **(Register Client(s))** button.



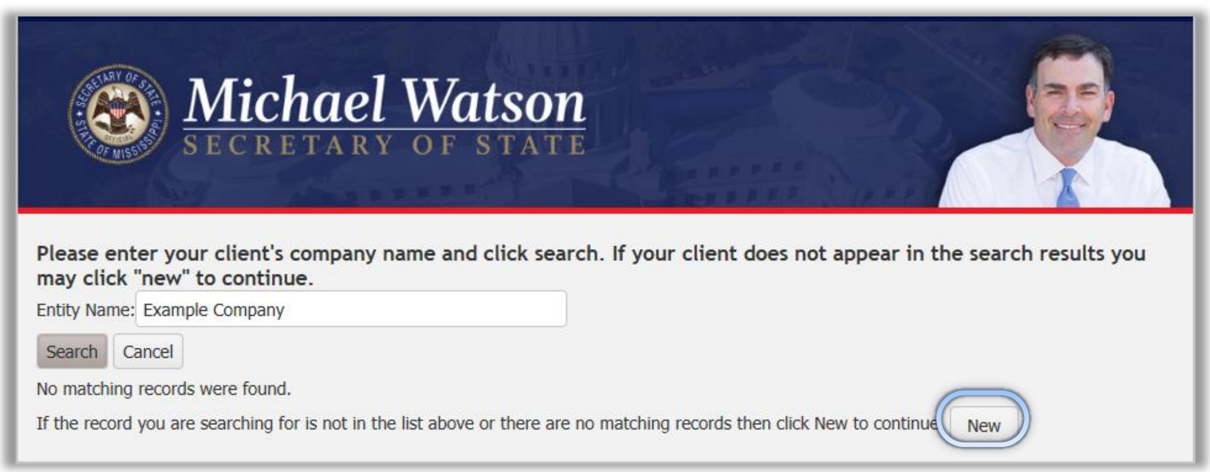
2. Enter your Client's company name in the box provided for Entity Name.



- If the client’s company appears in the search results click on it, and then click the **(Search)** button.

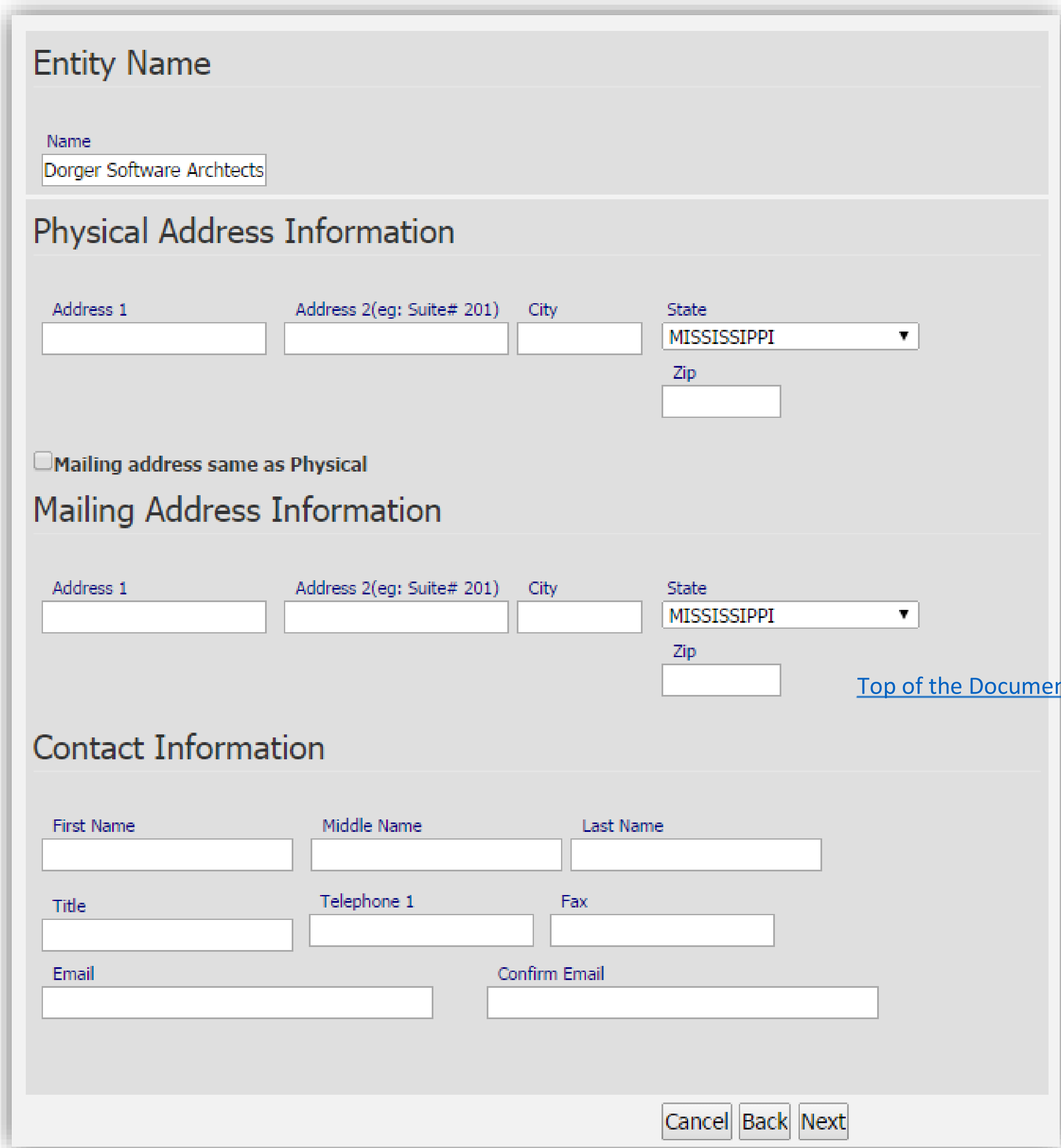


- Under the box marked Entity Name, Click on the <u>**name**</u> of your client’s company to continue registration.



- If the client’s company does not appear in the search results you may 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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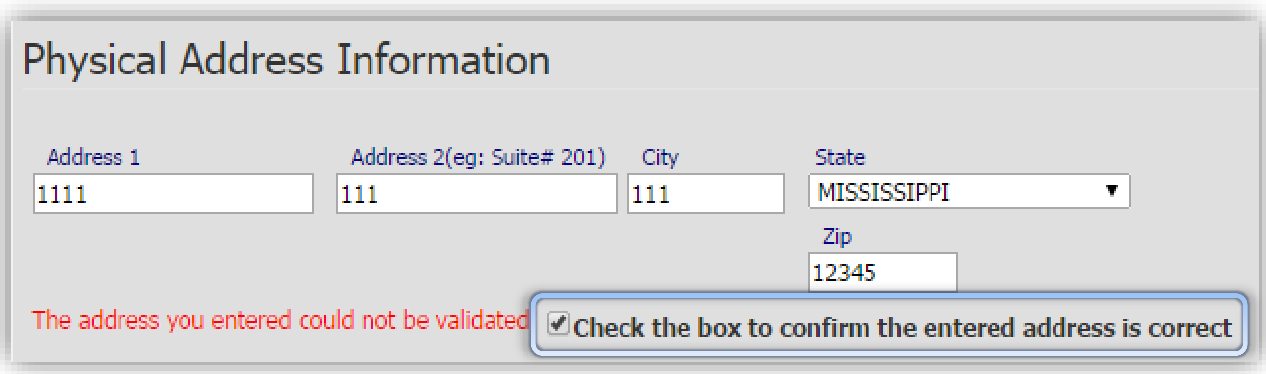
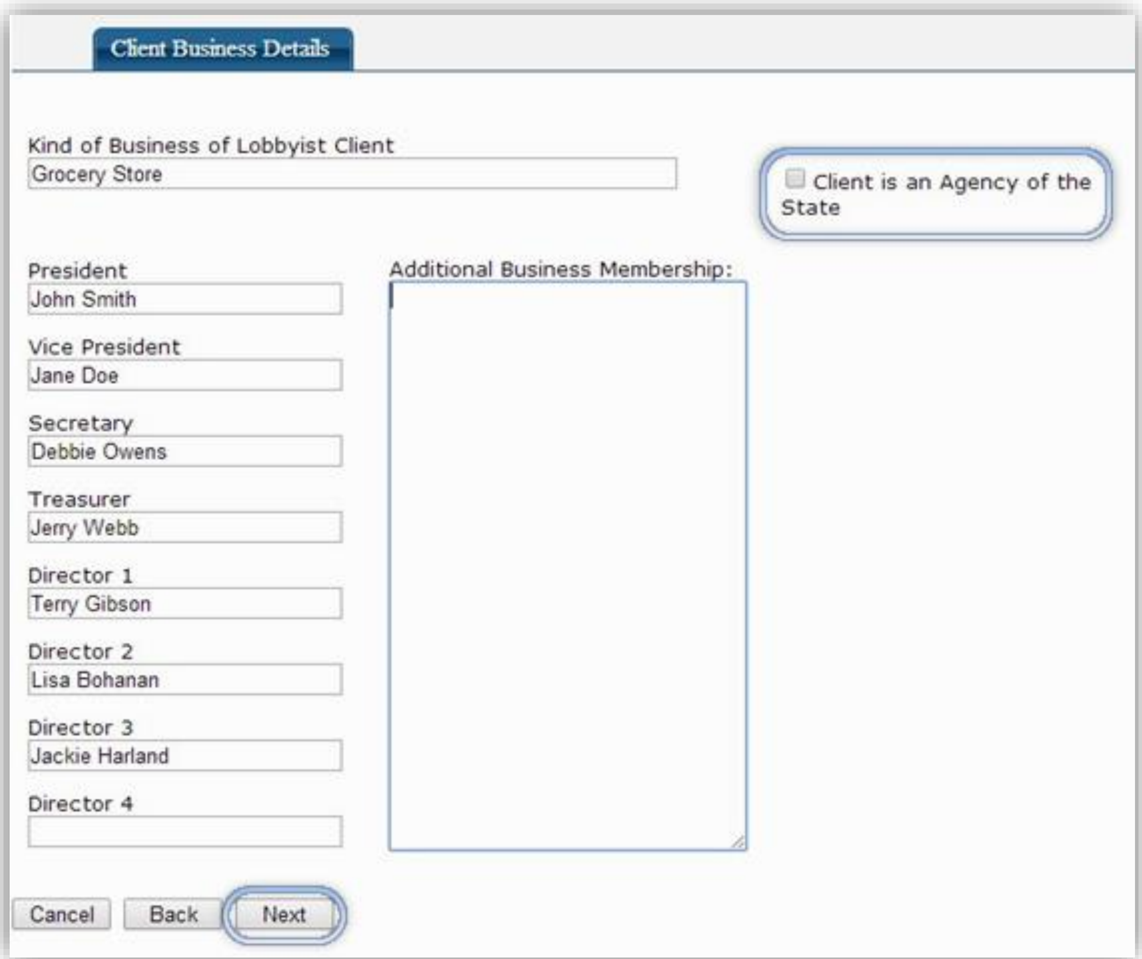
- Fill in the Physical Address Information, Mailing Address Information (or click the [checkbox] next to *Mailing address same as Physical*), and Contact Information.
- When you are finished filling in the information, click the **(Next)** button to continue.



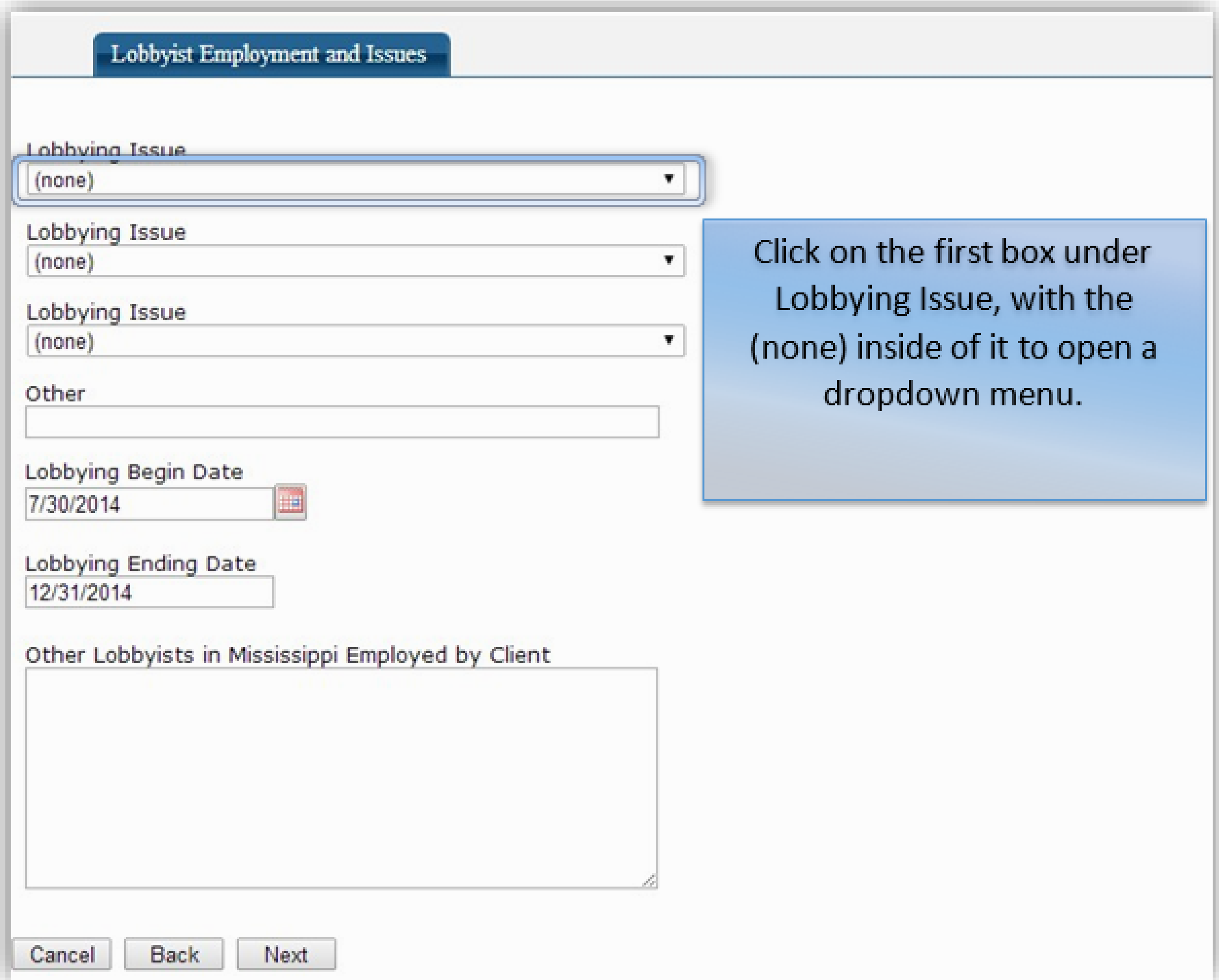
- If the form comes back with the message "The address you entered could not be validated!", but the address is correct with no errors *click on the [checkbox] next to "Check the box to confirm that the entered address is correct," and then click the (**Next)** button again.*

3. Fill in Client Business Details in the boxes provided.

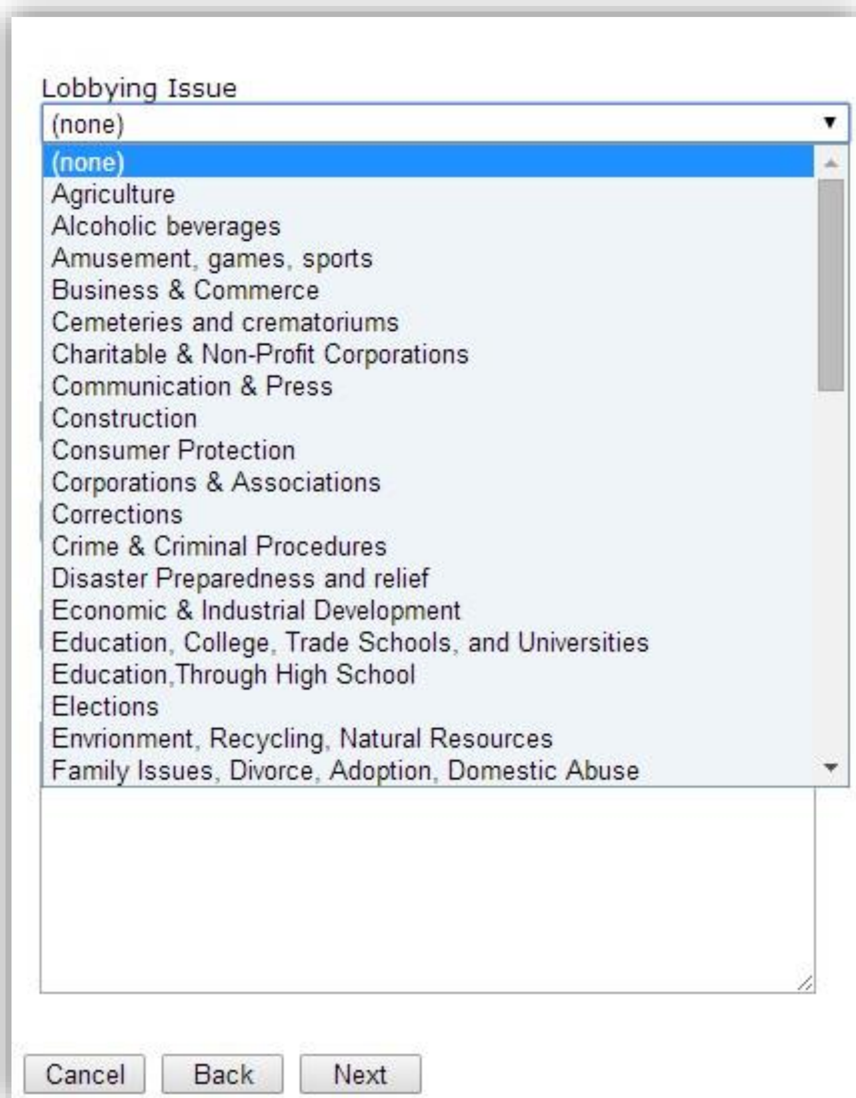


4. If the client is an Agency of the State click the [checkbox] at the top right.
5. Click the **(Next)** button to continue to the Lobbyist Employment and Issues page.

6. Here you may enter Lobbying Issues and other Lobbyist employed by the Client.



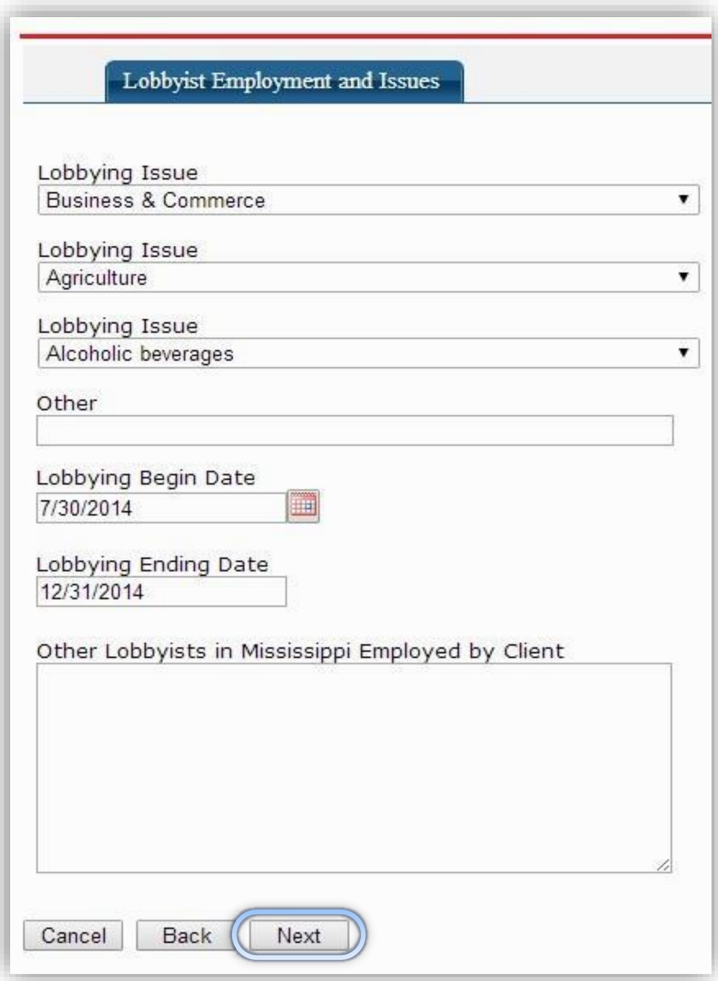
7. In the dropdown menu you may choose from several Lobbying Issues.
8. Click on the lobbying issue that applies to the client to select it.



9. You may repeat this step in the other Lobbying Issue boxes to enter more lobbying issues if needed.

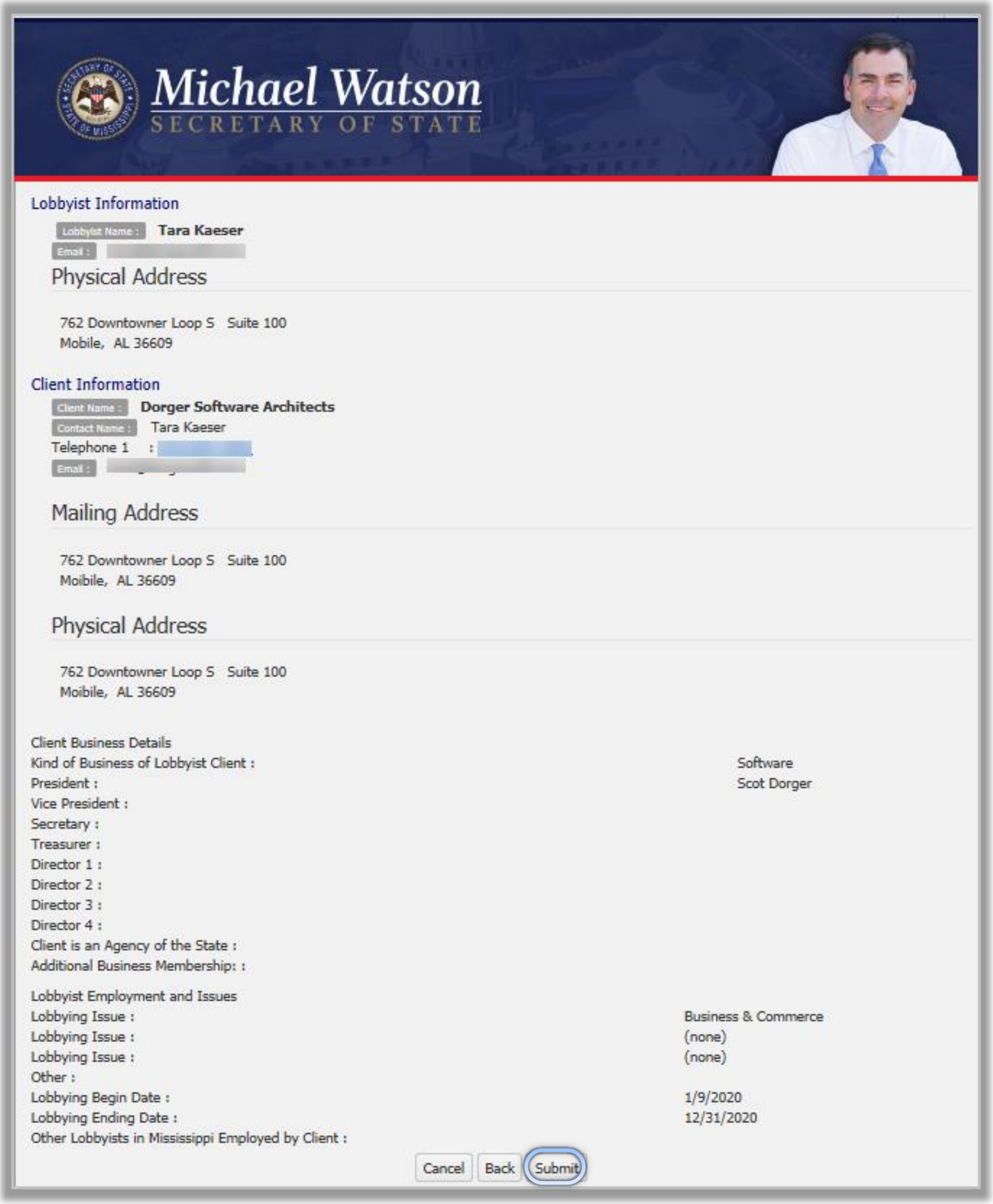
10. In the box titled Other you may enter additional information

11. 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.



12. Enter the Lobbying Ending Date
13. You may enter other Lobbyists in Mississippi Employed by the client in the box provided.
14. Click the **(Next)** button to continue on to review and submit your client registration.

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



Michael Watson
SECRETARY OF STATE

Lobbyist Information

Lobbyist Name : **Tara Kaeser**
Email :

Physical Address

762 Downtowner Loop S   Suite 100
Mobile, AL 36609

Client Information

Client Name : **Dorger Software Architects**
Contact Name : Tara Kaeser
Telephone 1 :
Email :

Mailing Address

762 Downtowner Loop S   Suite 100
Moibile, AL 36609

Physical Address

762 Downtowner Loop S   Suite 100
Moibile, AL 36609

Client Business Details	
Kind of Business of Lobbyist Client :	Software
President :	Scot Dorger
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 :	Business & Commerce
Lobbying Issue :	(none)
Lobbying Issue :	(none)
Other :	
Lobbying Begin Date :	1/9/2020
Lobbying Ending Date :	12/31/2020
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.

16. When you are sure all of the information is correct click the **(Submit)** button to continue.

17. Here you may choose to pay now, pay later or 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.

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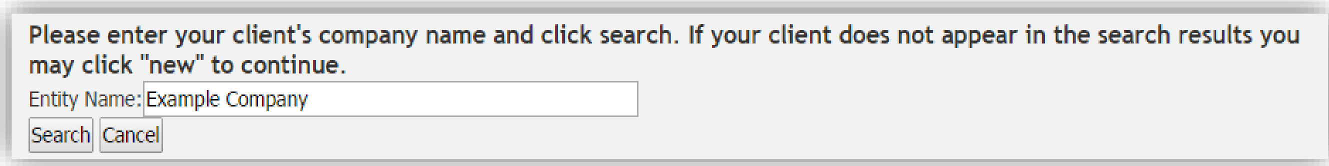
Pay Now

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

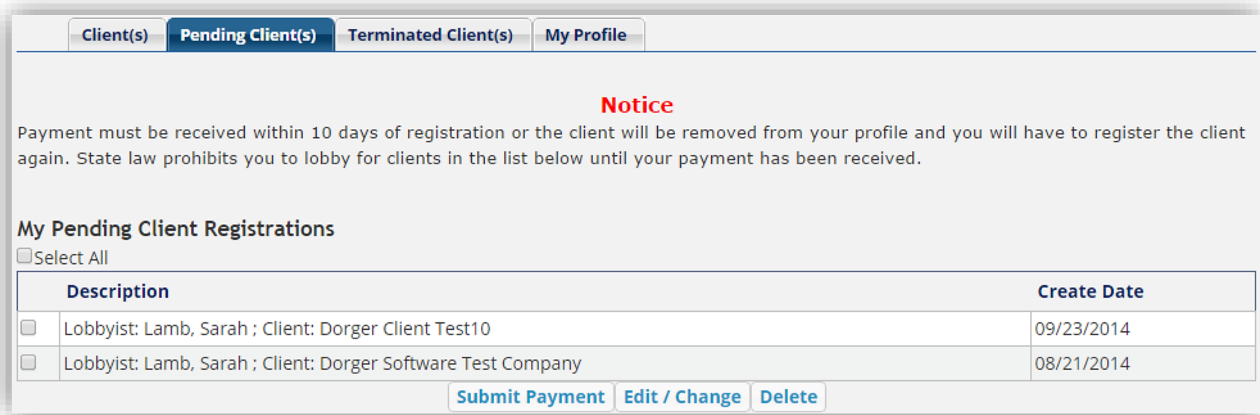
I want to register another client

When you click the **(I want to register another client)** button you will be directed back to the first page where you may enter another entity.



Pay Later

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



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.

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.

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

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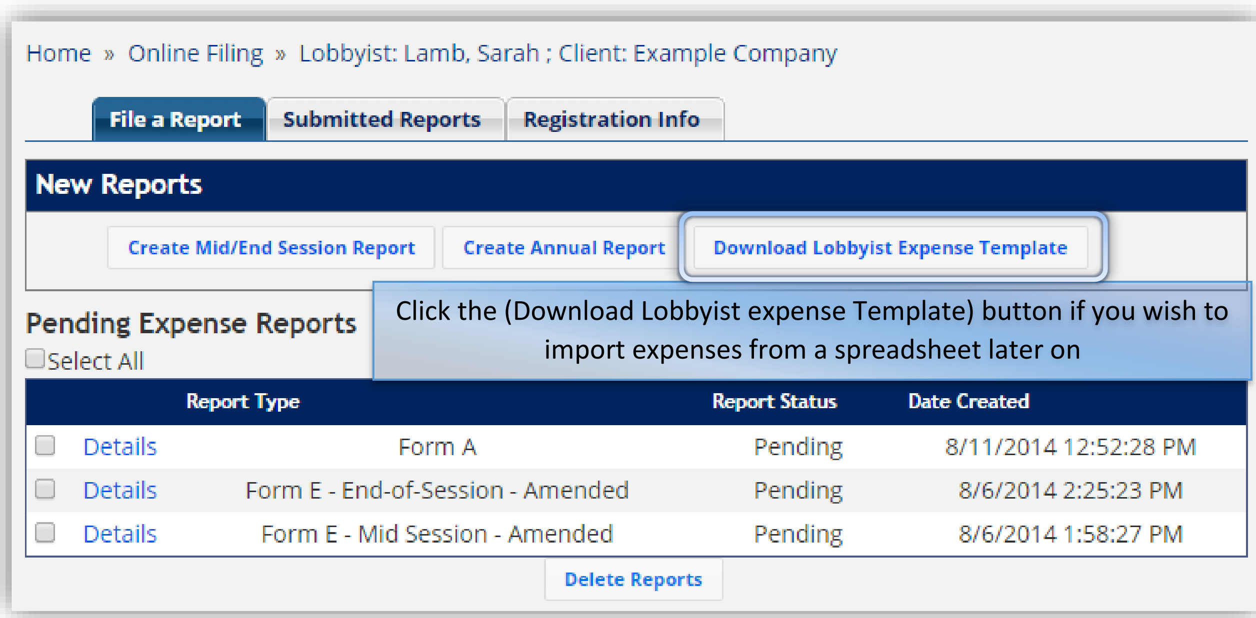
Filing Reports as a Lobbyist

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.

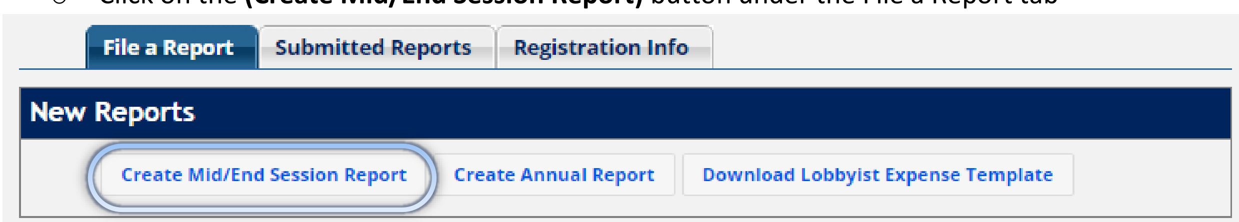
4. Click the **Details** link to review the registration and Create/Submit Lobbyist Reports. You will use this path to file Mid/End Session, Annual, and Termination Reports.



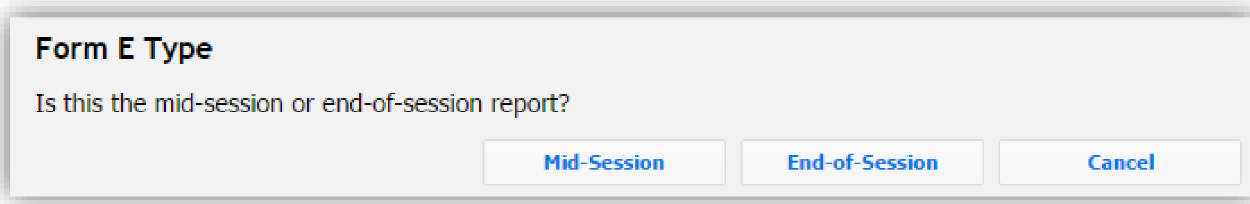
5. There are tabs across the top labeled *File a Report, Submitted Reports*, and *Registration Info*
6. Under the *File a Report* tab notice the box titled New Reports where you will see the **(Create Mid/End Session Report), (Download Lobbyist Expense Template)** and **(Create Annual Report)** buttons.

Create Mid/End Session Report

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



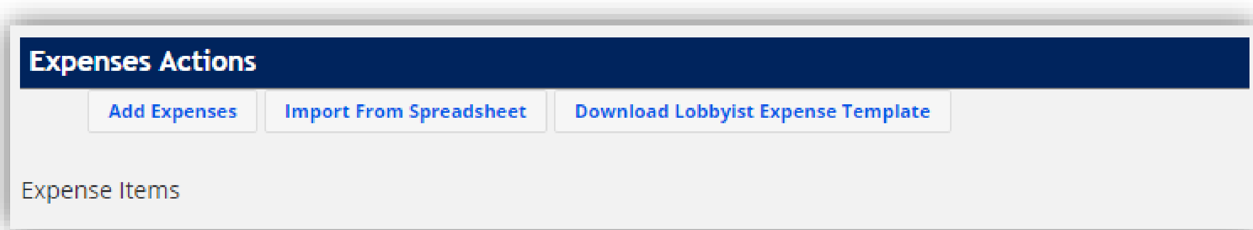
- If you are not ready to start a report Click the **(Cancel)** button to exit.



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

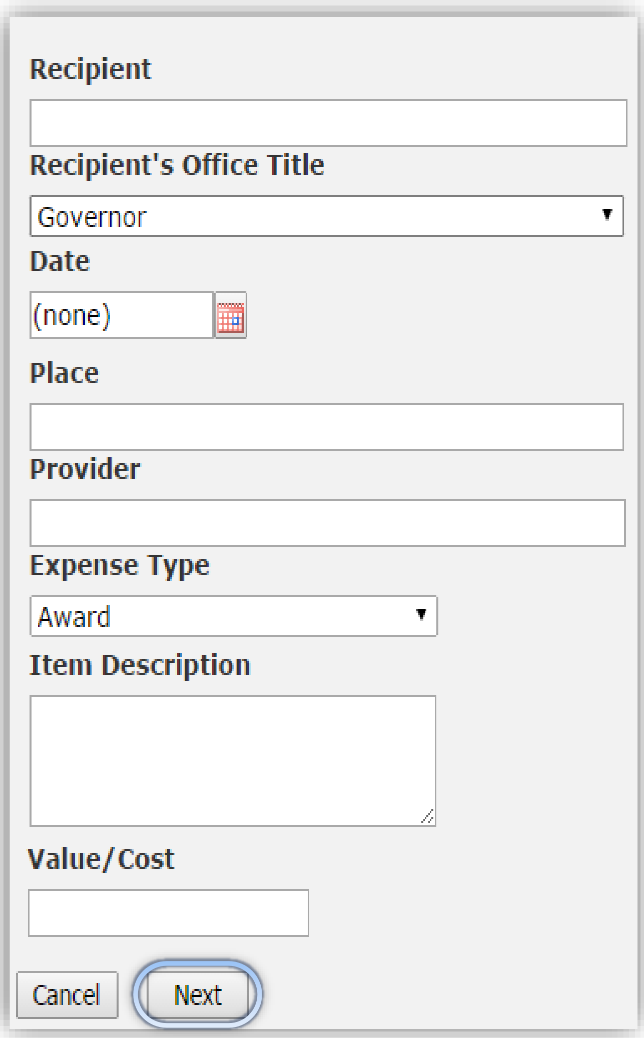
Expenses Actions-(Mid/End-Session report)

- 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.



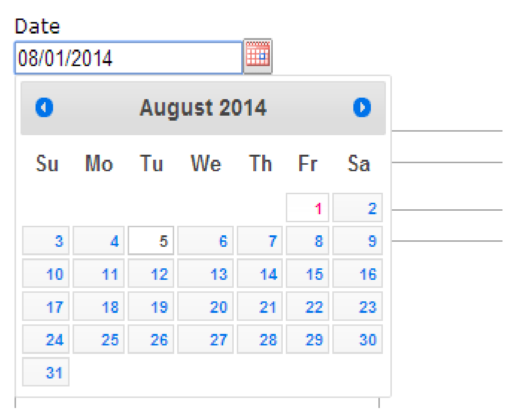
Add Expenses

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

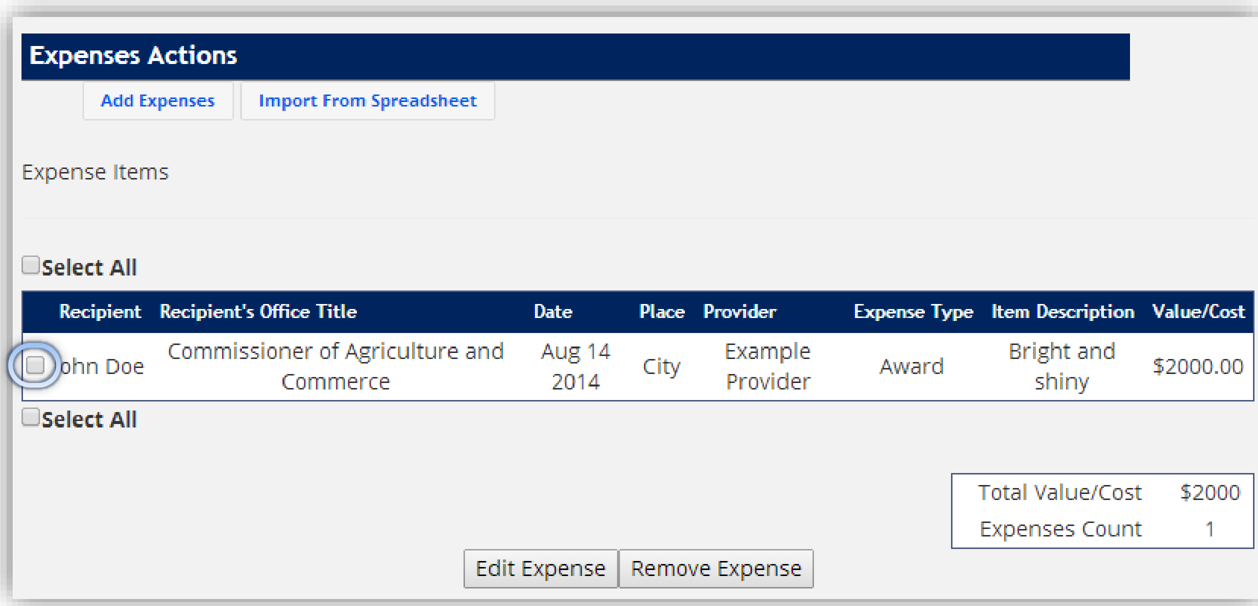


Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

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



2. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
3. 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.



- 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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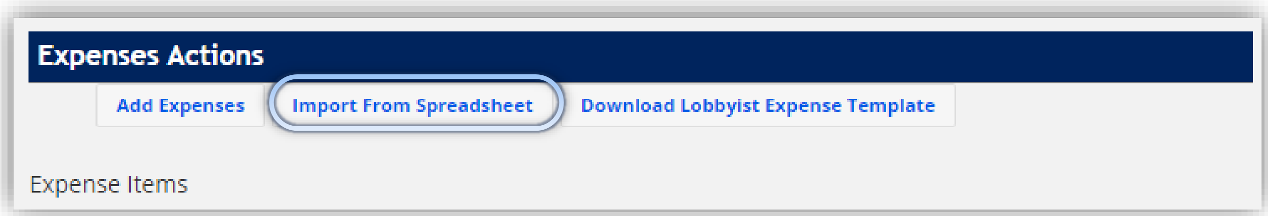
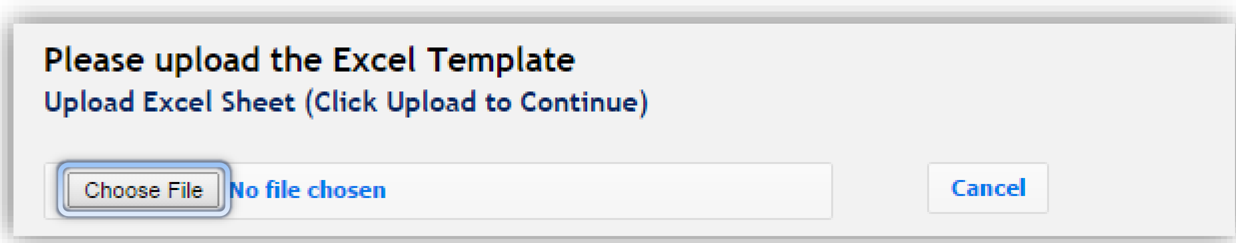
Import from Spreadsheet



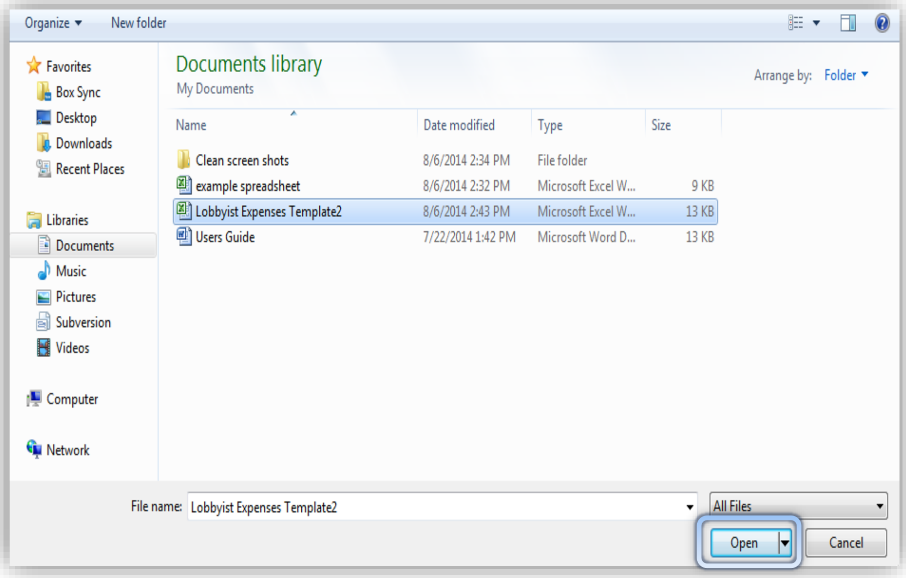
1. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

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).**

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.



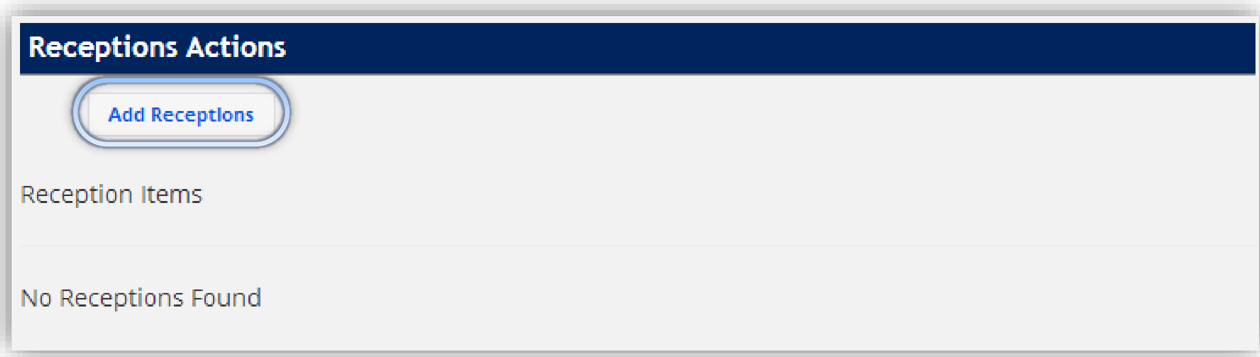
Click on the Excel Sheet you wish to upload and click the **(Open)** button.

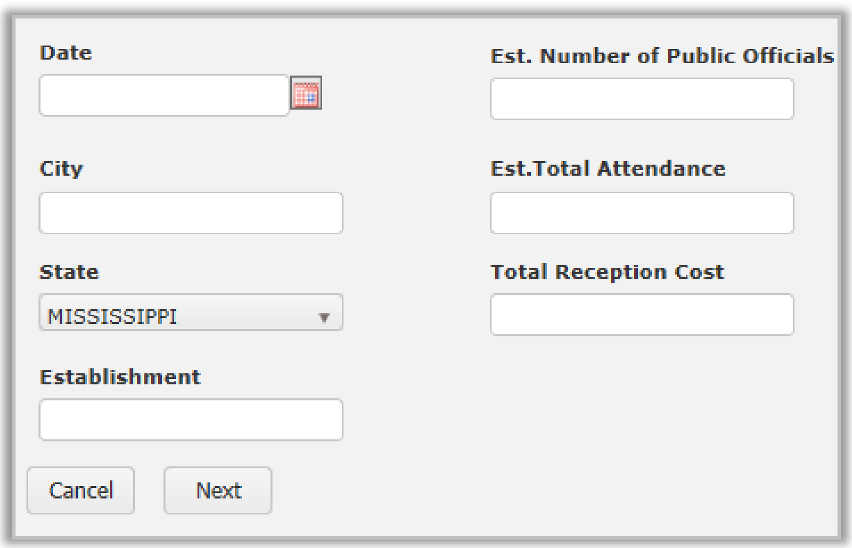
Next you should see the file you opened in the ***Choose File*** box and an **(Upload)** button has appeared.

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

Receptions Actions-(Mid/End-Session report)

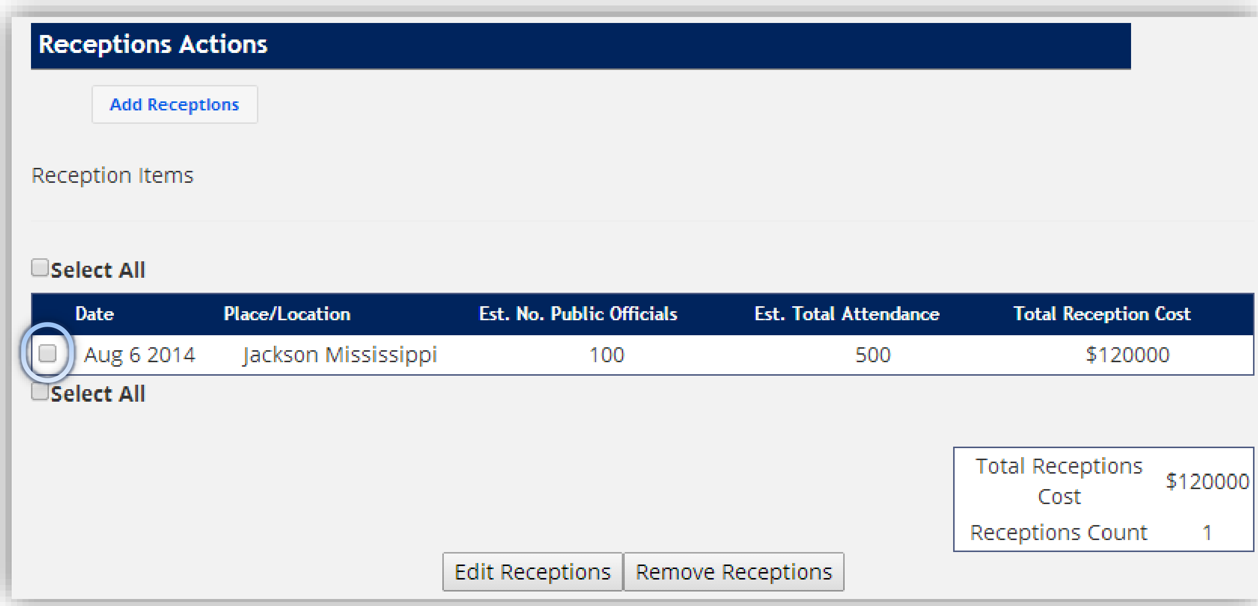
1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.





- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- 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 E Expense Report page 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.

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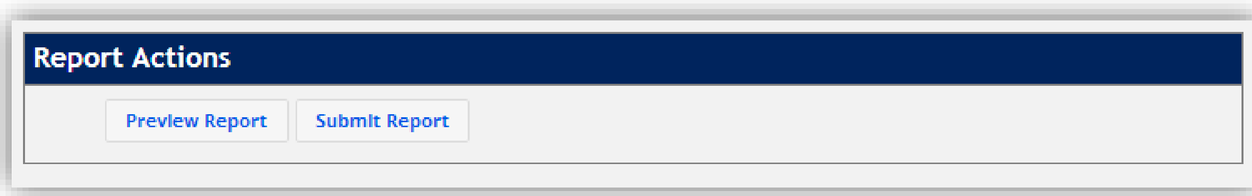
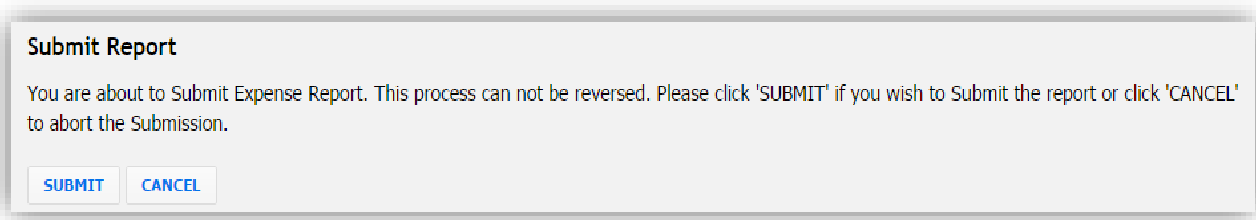
Report Actions-(Mid/End-Session report)



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

OR

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



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.

5. Click the [Check box] next to the reports you would like to submit, and click the **(Next)** button to continue.

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

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

8. 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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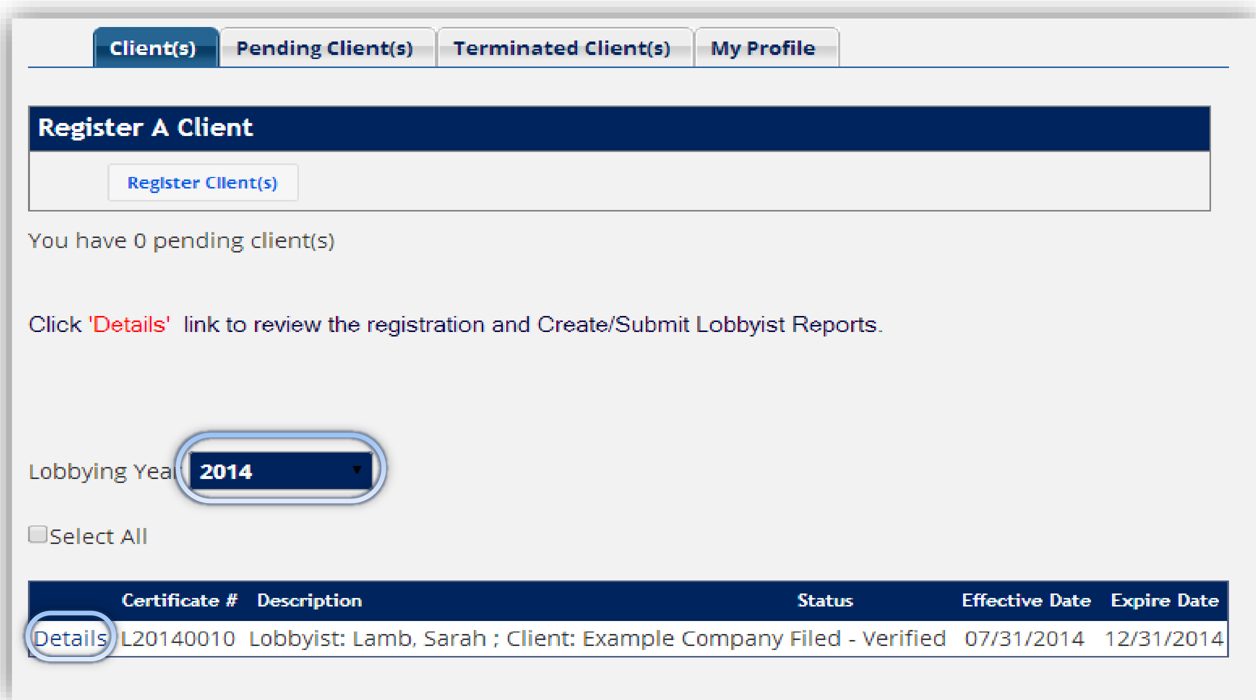
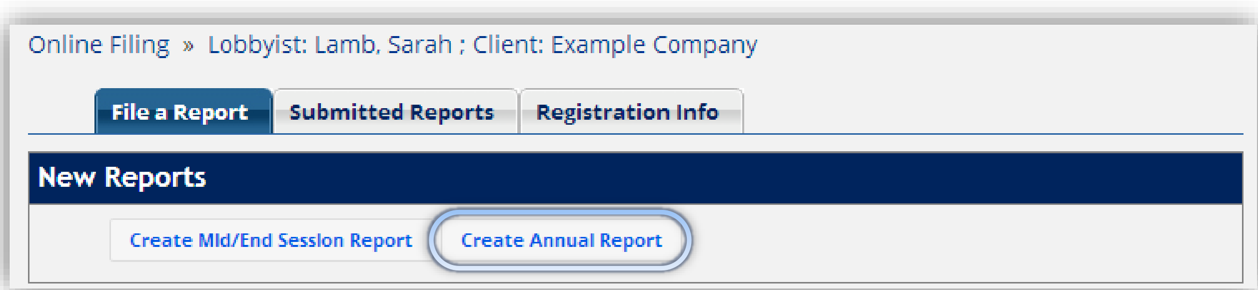
Create Annual/Termination Report

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

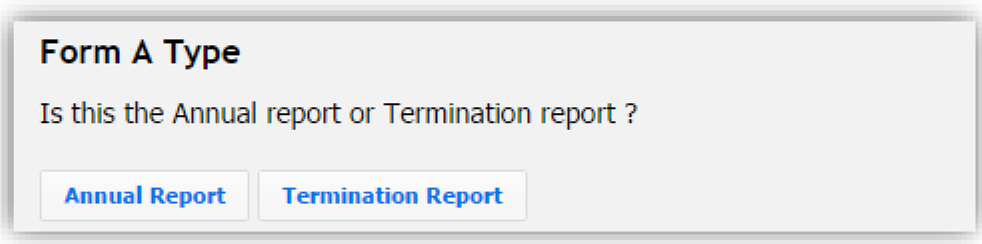


3. This will display a list of Client Registrations for that year click on the **Details** link.

4. To create Annual or Termination reports click the **(Create Annual Report)** button.



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



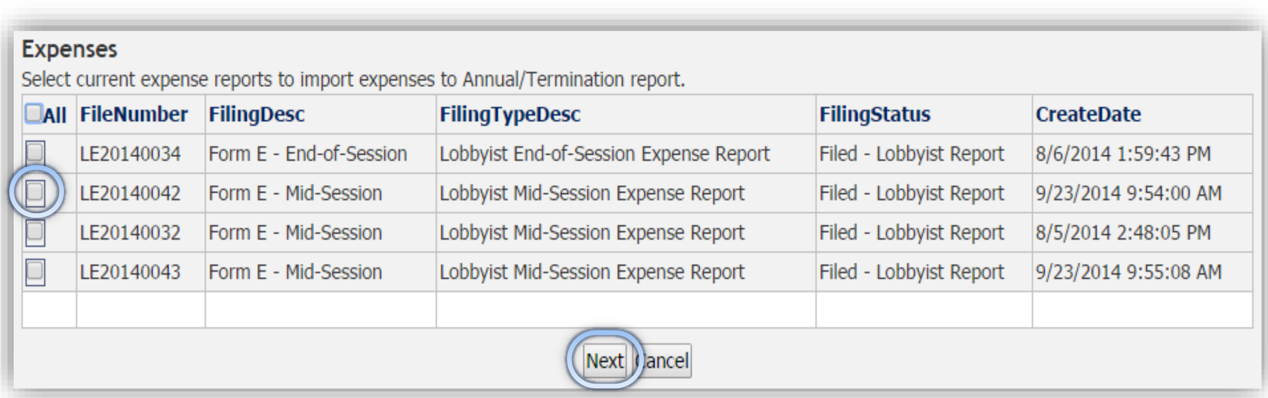
To create annual reports click the **(Annual Report)** button.

OR

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

Top of the Document

Annual Report


Expenses

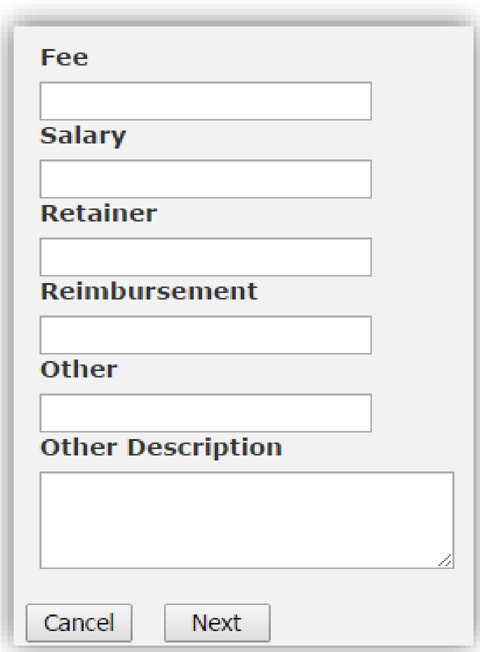
Select current expense reports to import expenses to Annual/Termination report.

All	FileNumber	FilingDesc	FilingTypeDesc	FilingStatus	CreateDate
	LE20140034	Form E - End-of-Session	Lobbyist End-of-Session Expense Report	Filed - Lobbyist Report	8/6/2014 1:59:43 PM
	LE20140042	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	9/23/2014 9:54:00 AM
	LE20140032	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	8/5/2014 2:48:05 PM
	LE20140043	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	9/23/2014 9:55:08 AM

Next Cancel

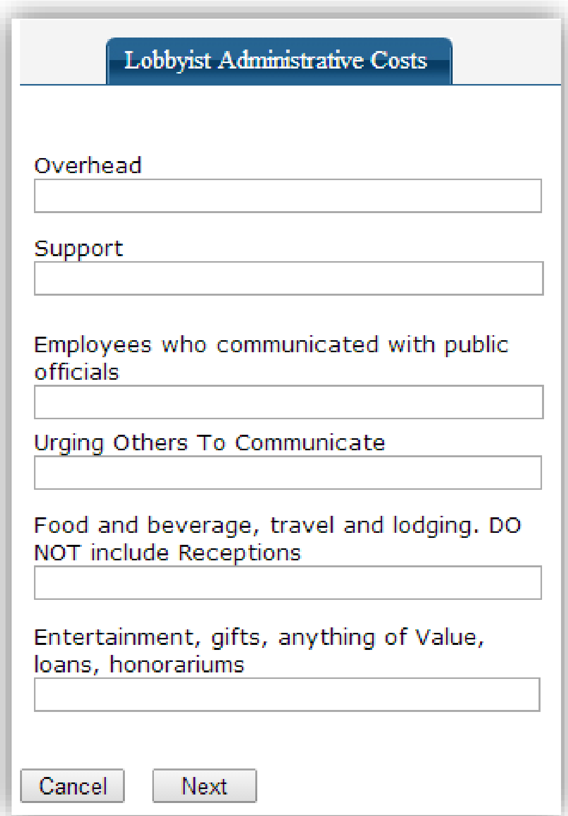
1. Click on the [checkbox] to the left that corresponds with the expense reports you wish to import to the Annual or Termination report.
2. Click the **(Next)** button.

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



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

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

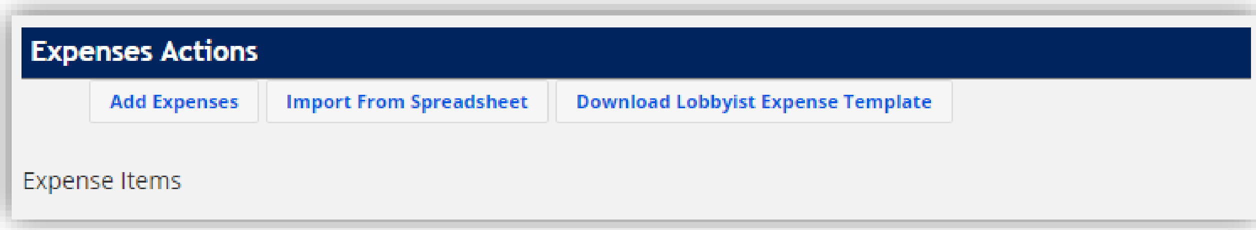


Fill out the Lobbyist Administrative Cost form and click the **(Next)** button.

Top of the Document

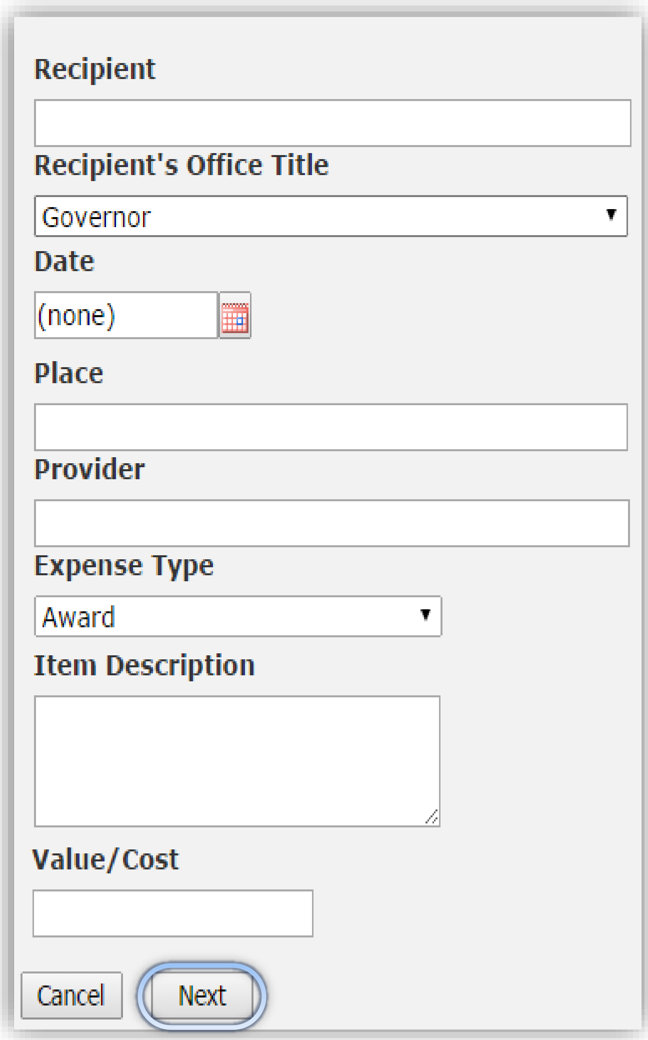
Expenses Actions-(Annual Report)

- 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.



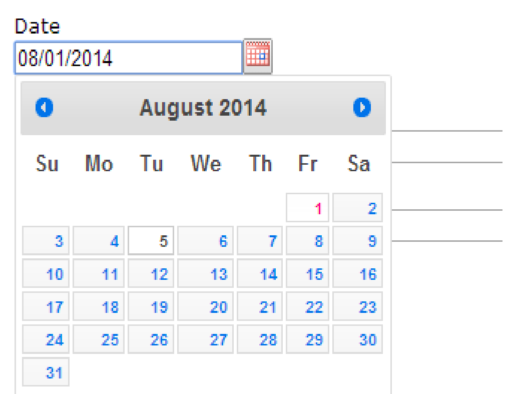
Add Expenses

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

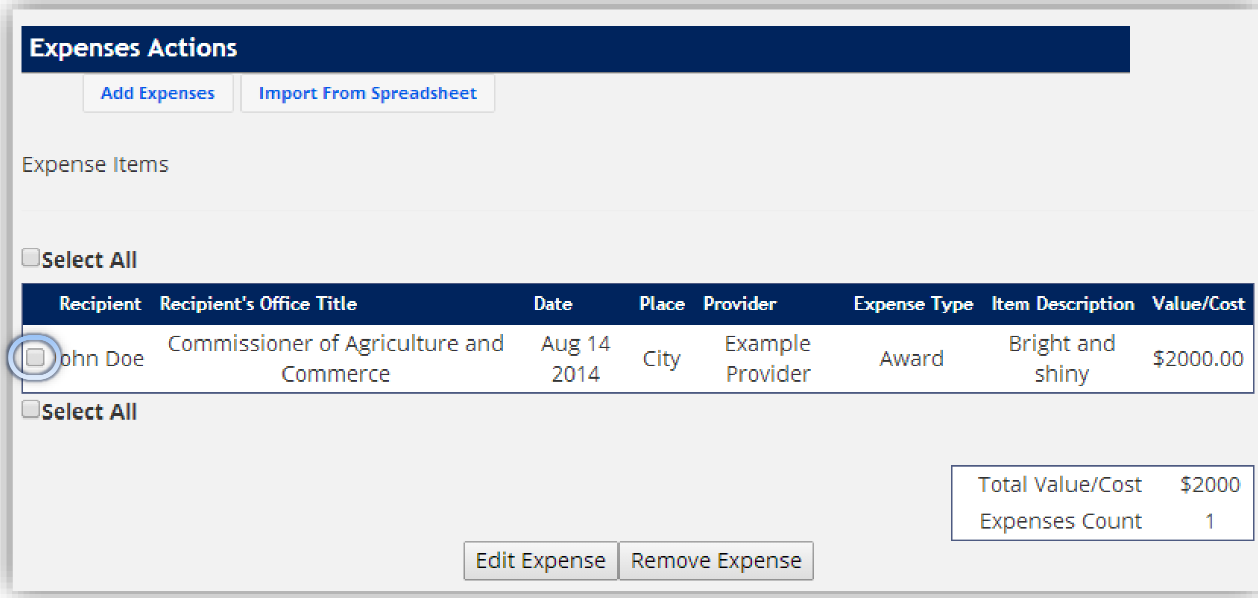


Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

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



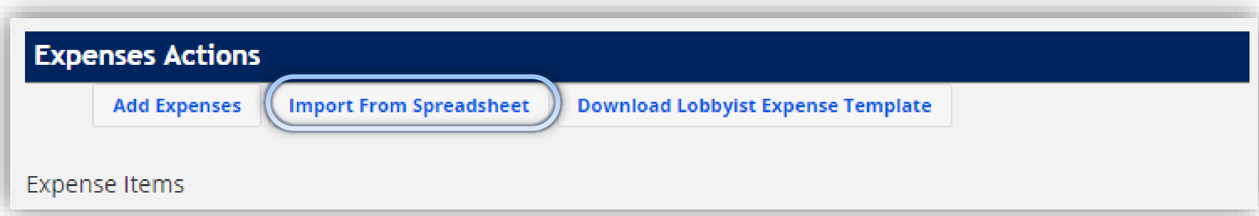
5. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
6. After you click the **(Next)** button you will be taken back to the Annual Report page that shows your newly entered Expense Item.



- 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.

Top of the Document

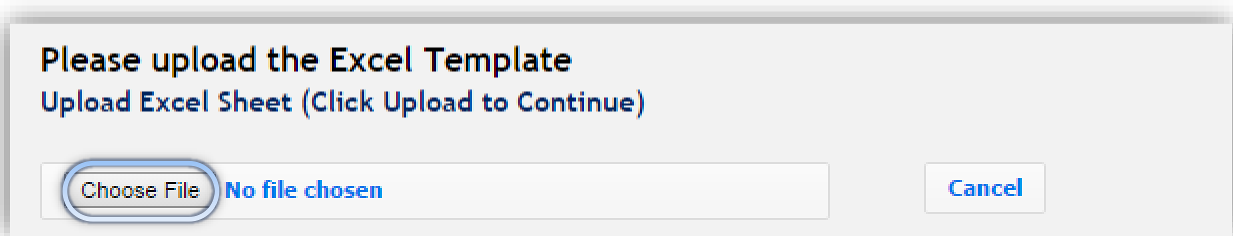
Import from Spreadsheet



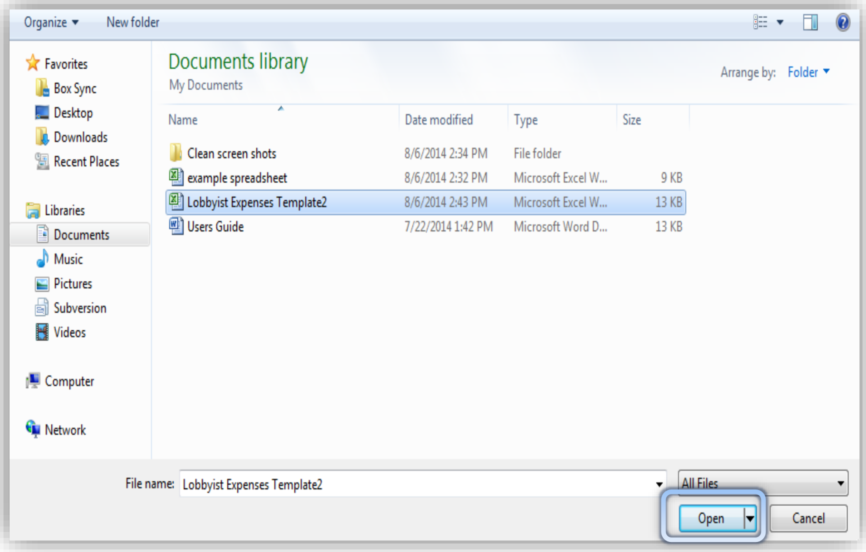
6. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

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).**

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



9. 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.

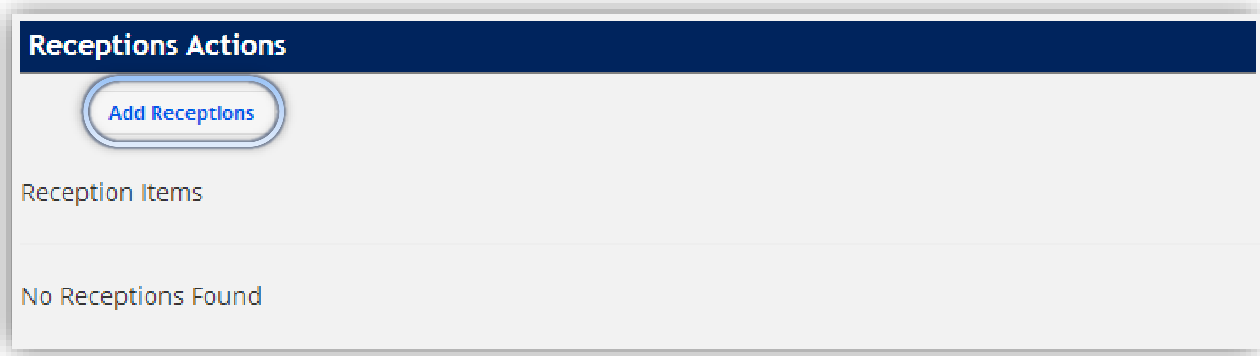
Next you should see the file you opened in the ***Choose File*** box and an **(Upload)** button has appeared.

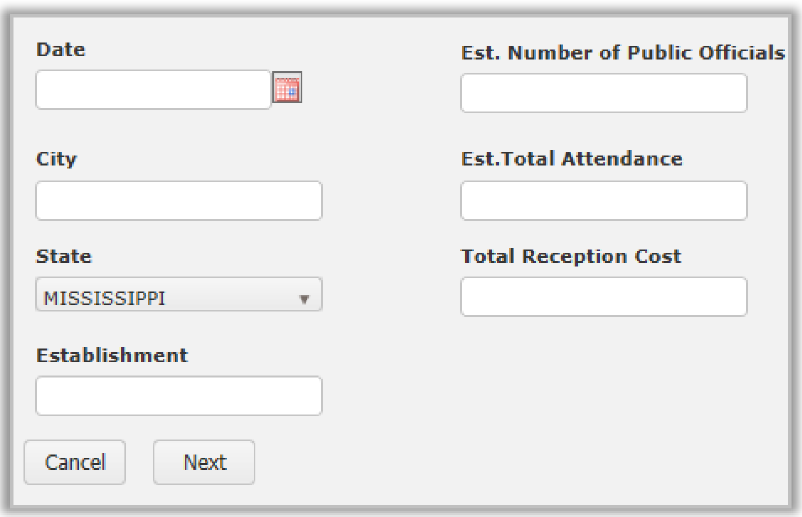
10. Click the **(Upload)** button to import your Excel Sheet.

Top of the Document

Receptions Actions-(Annual Report)

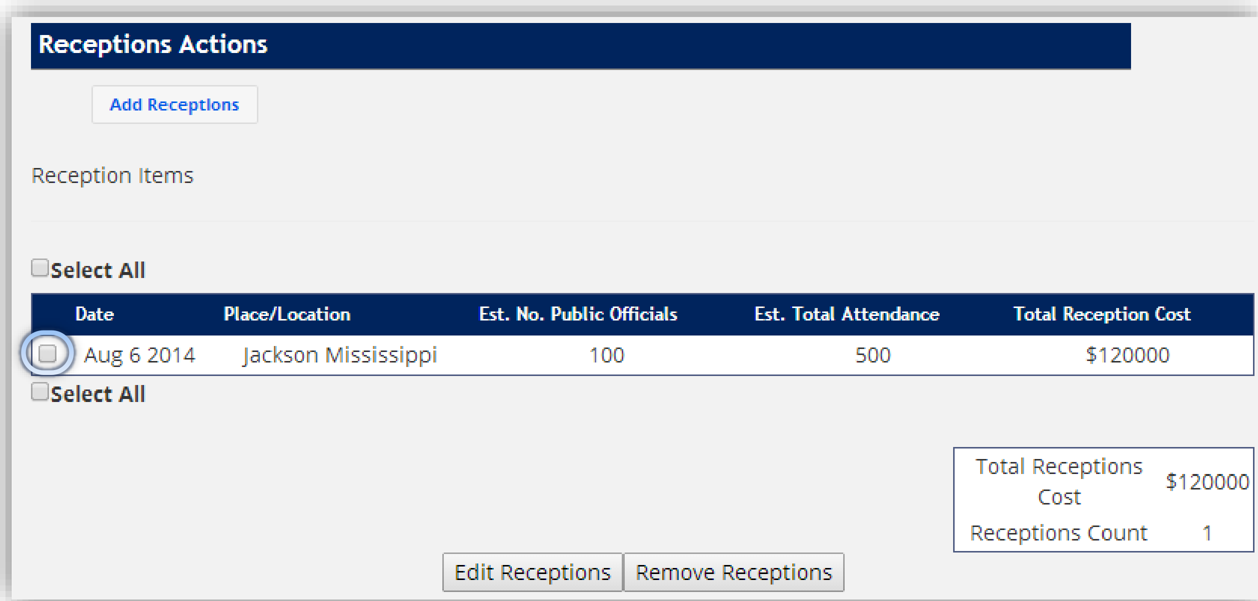
1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.





- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- 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 E Expense Report page that shows your newly entered Reception Action.

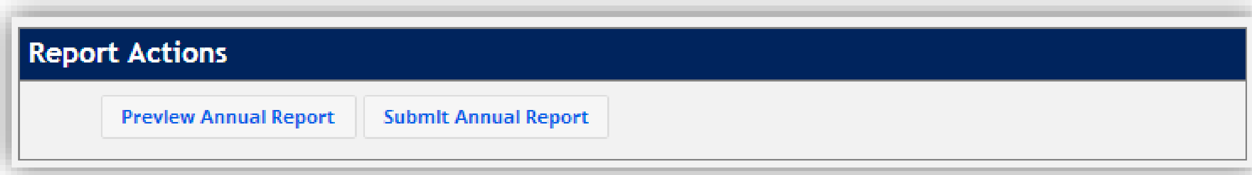


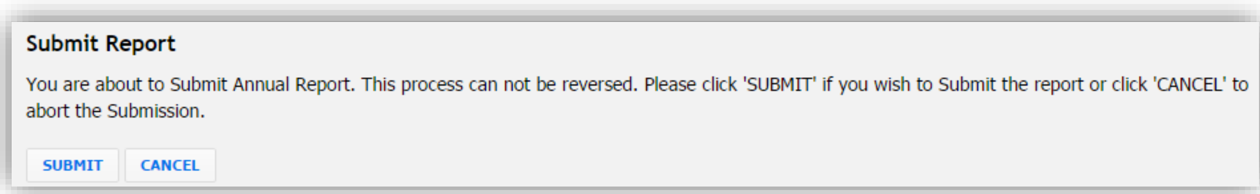
3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions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

Top of the Document

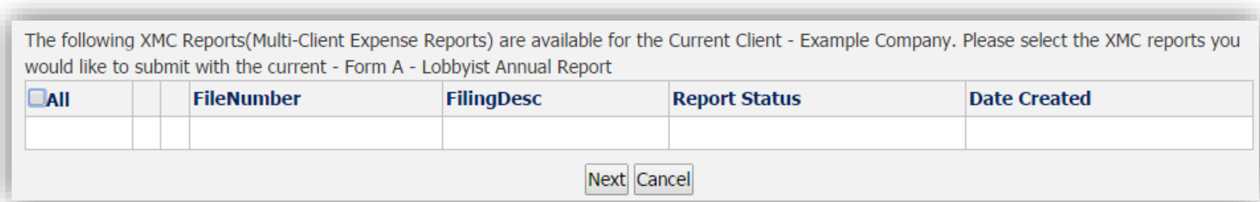
Report Actions-(Annual Report)

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.
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.

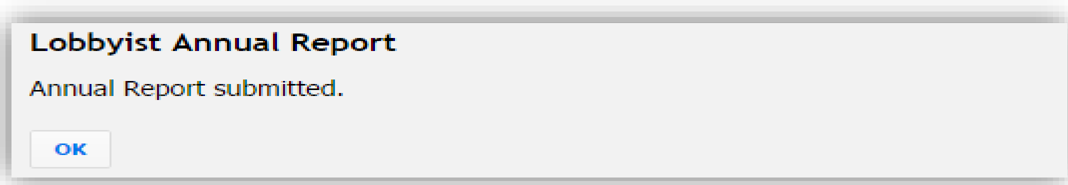




3. Click the **(SUBMIT)** button.
4. On the next screen check the [checkbox] that corresponds with the report you would like to submit. Or check the [checkbox] next to All.



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



[Top of the Document]

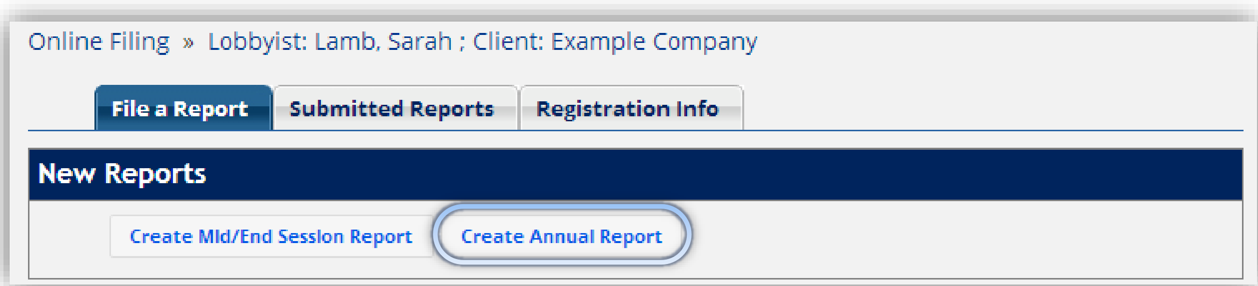
6. Click the **(OK)** button to finish.

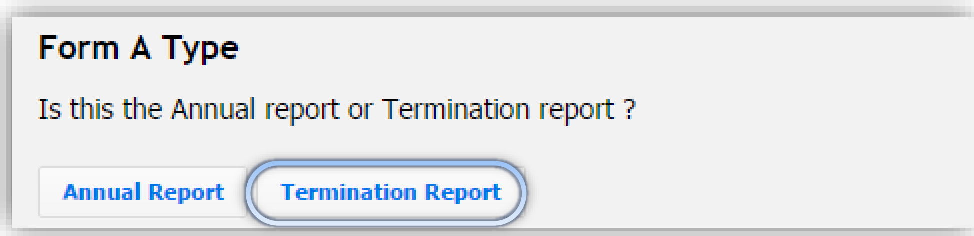
Termination Report

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

3. This will display a list of Client Registrations for that year click on the **Details** link.

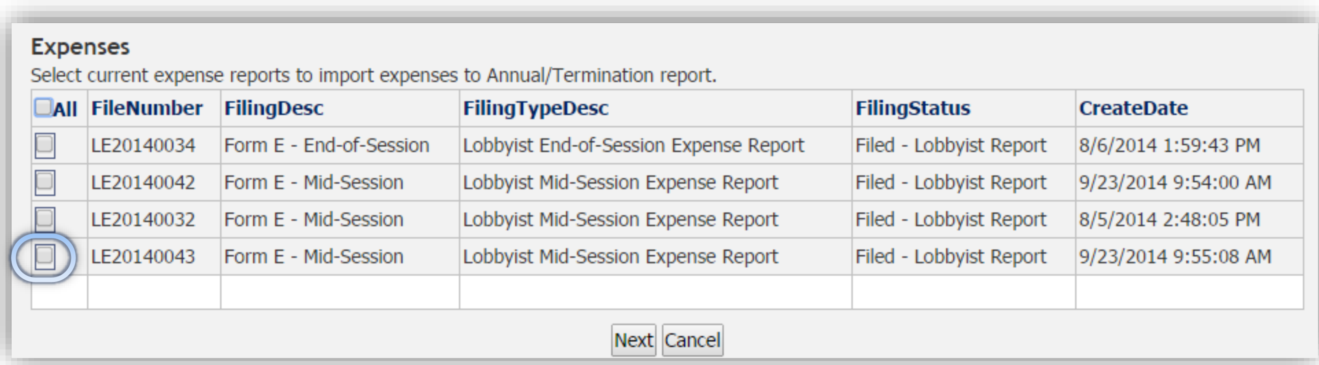
4. In order to create a termination report, click the **(Create Annual Report)** button.





5. Click on the **(Termination Report)** button.

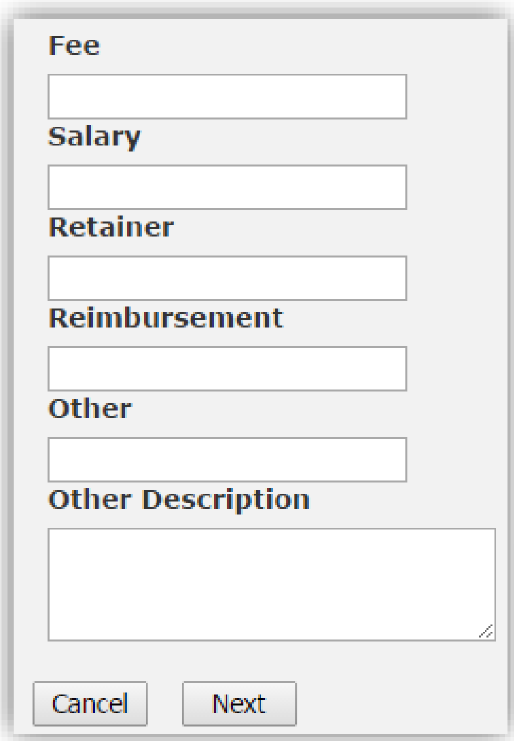
6. On the Expenses screen check the [checkbox] that corresponds with the expense report you wish to add to the Termination report.



All	FileNumber	FilingDesc	FilingTypeDesc	FilingStatus	CreateDate
	LE20140034	Form E - End-of-Session	Lobbyist End-of-Session Expense Report	Filed - Lobbyist Report	8/6/2014 1:59:43 PM
	LE20140042	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	9/23/2014 9:54:00 AM
	LE20140032	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	8/5/2014 2:48:05 PM
	LE20140043	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report	9/23/2014 9:55:08 AM

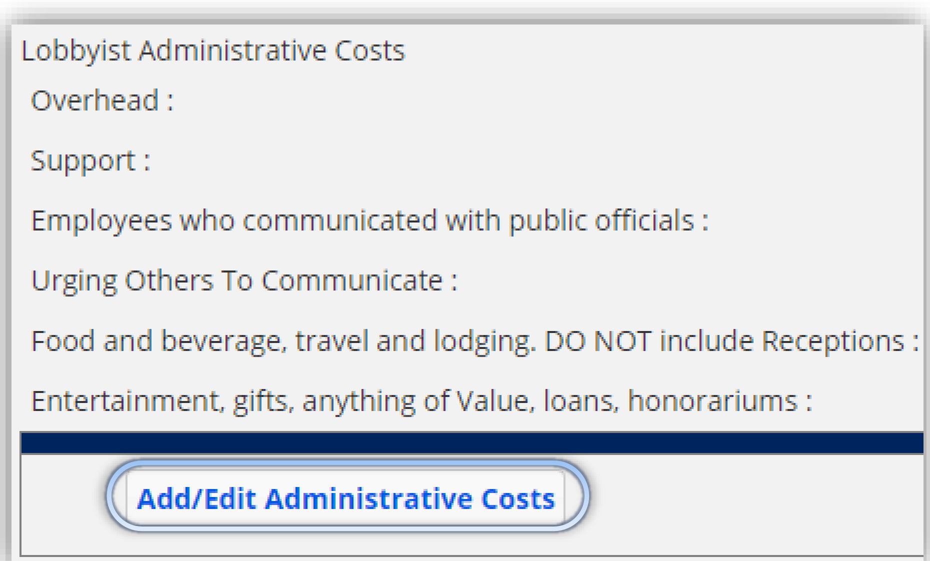
7. Click the **(Next)** button.

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



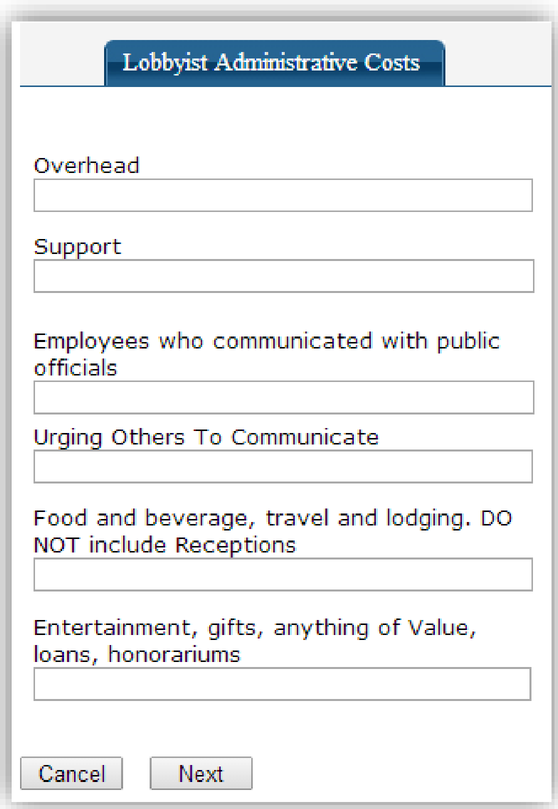
Fill out the Lobbyist Compensation form.

Click the **(Next)** button.



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

[Top of the Document](#)

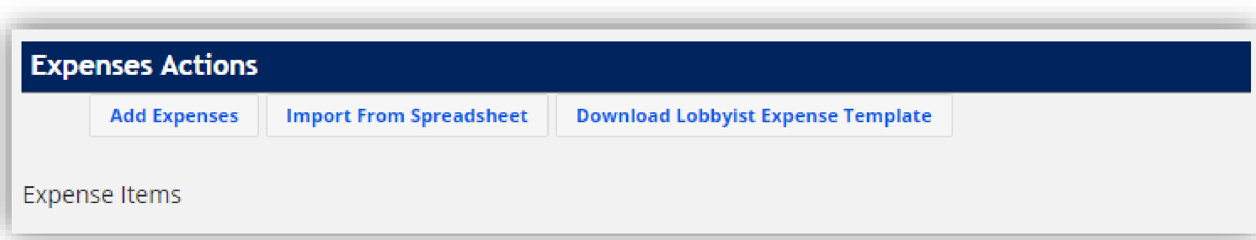


Fill out the Lobbyist Administrative Costs form.

Click the **(Next)** button.

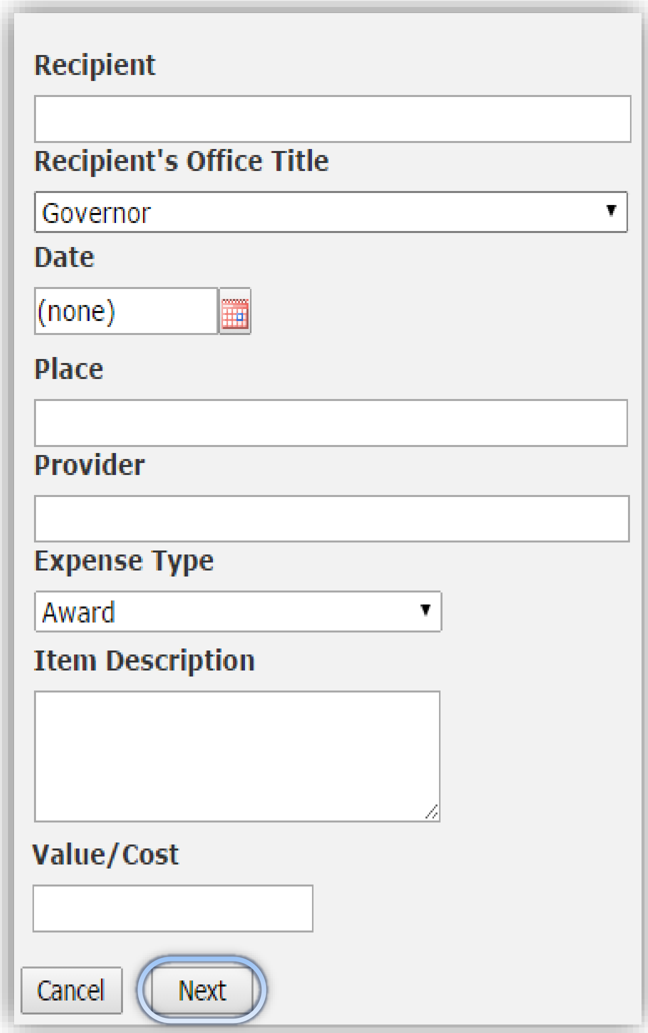
Expense Actions-(Termination report)

- 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.



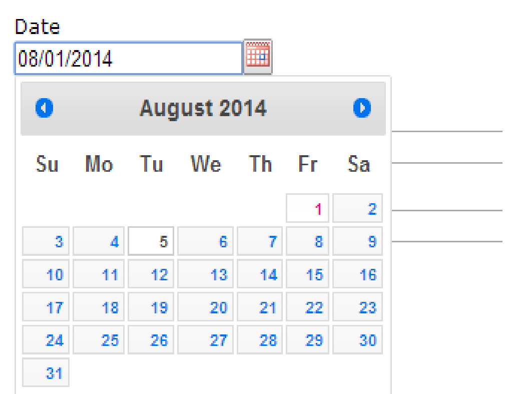
Add Expenses

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

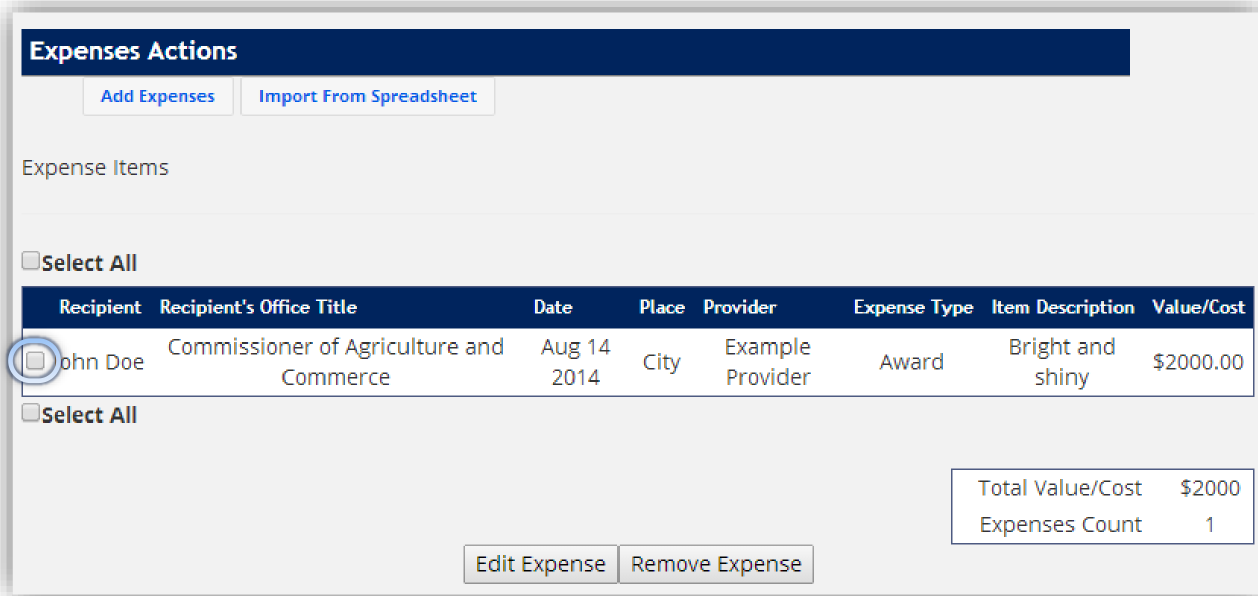


Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

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



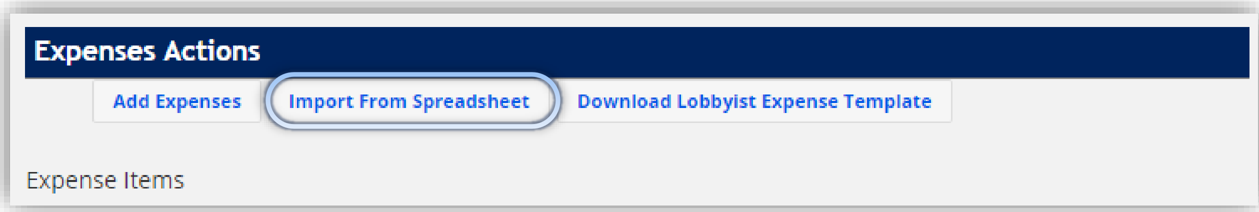
8. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
9. After you click the **(Next)** button you will be taken back to the Termination Report page that shows your newly entered Expense Item.



- 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.

Top of the Document

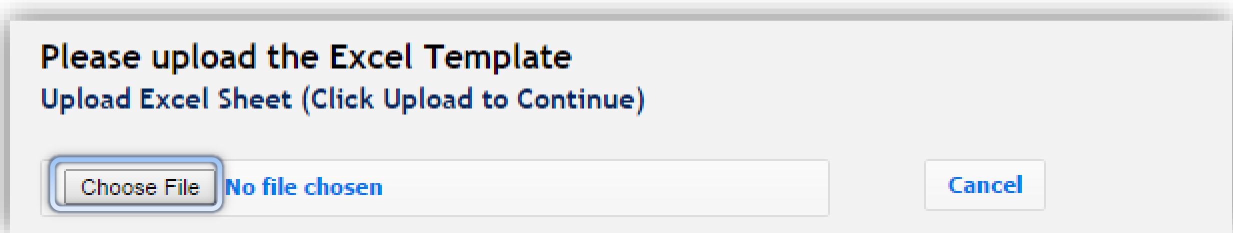
Import from Spreadsheet



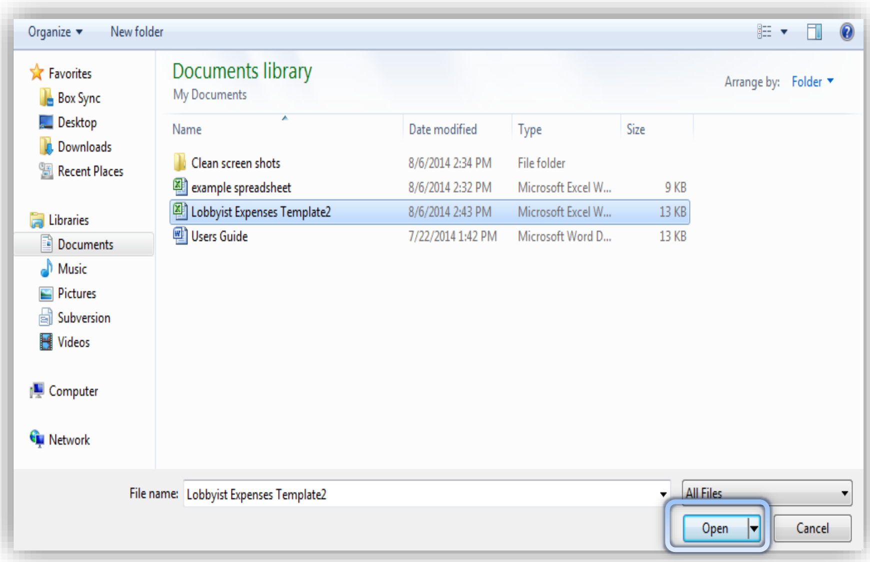
11. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

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).**

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

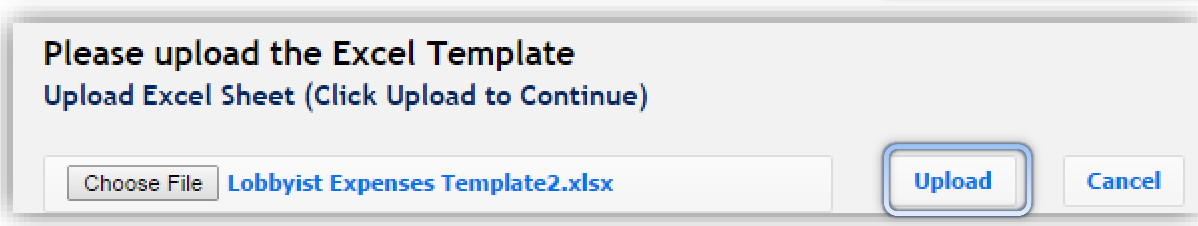


14. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



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.

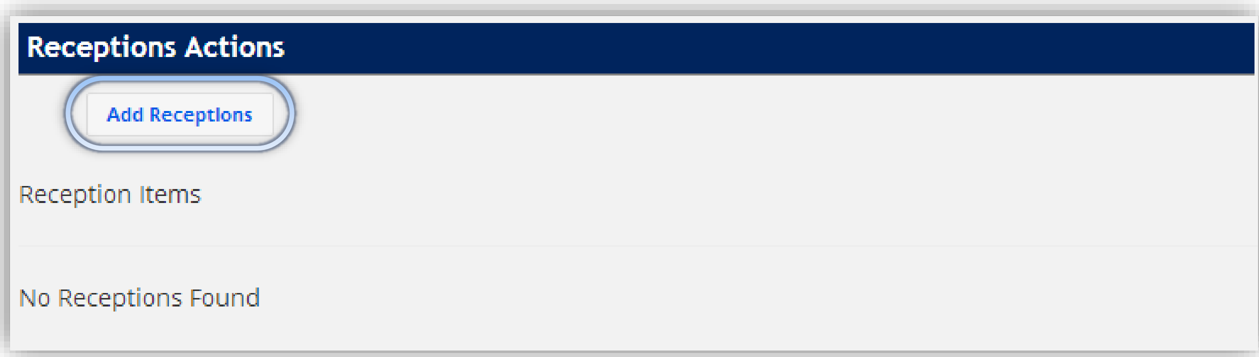


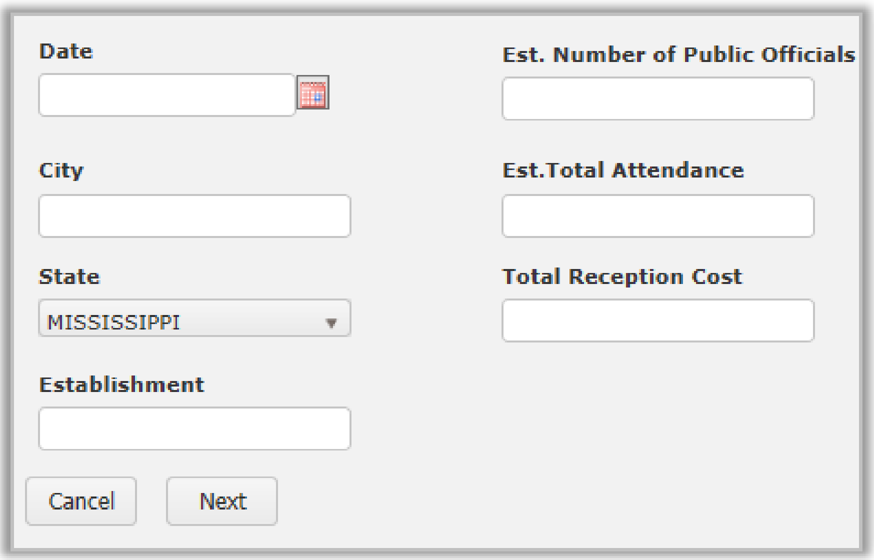
15. Click the **(Upload)** button to import your Excel Sheet.

Top of the Document

Receptions Actions-(Termination report)

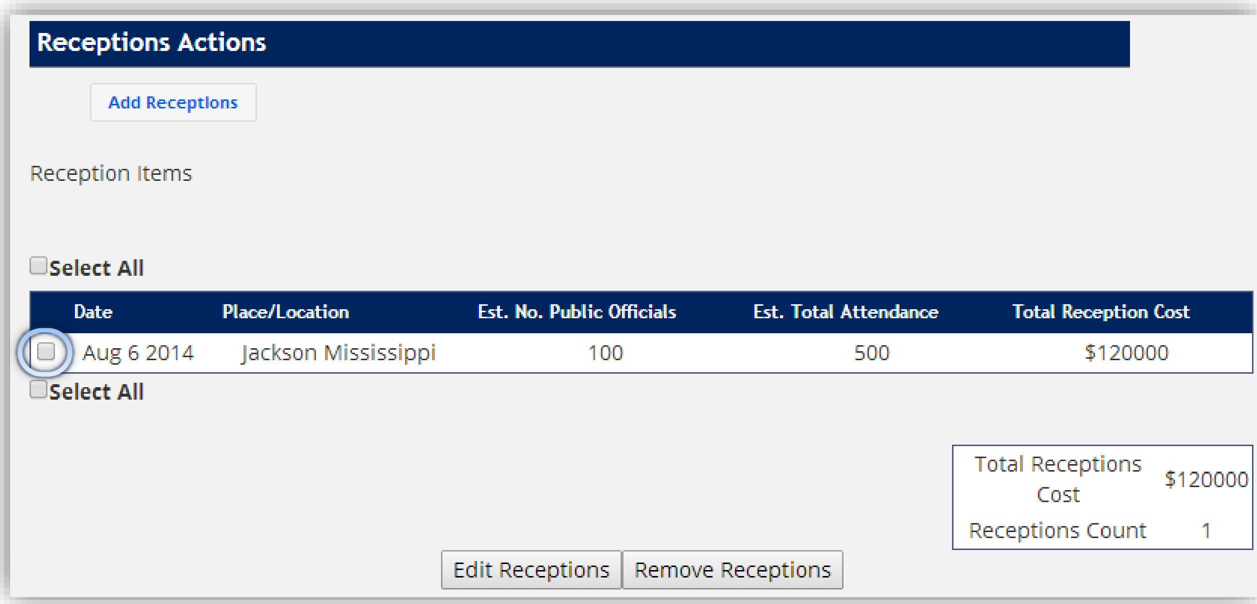
1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.





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

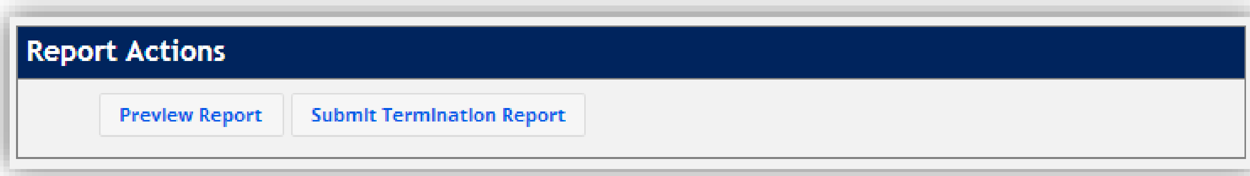
2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.



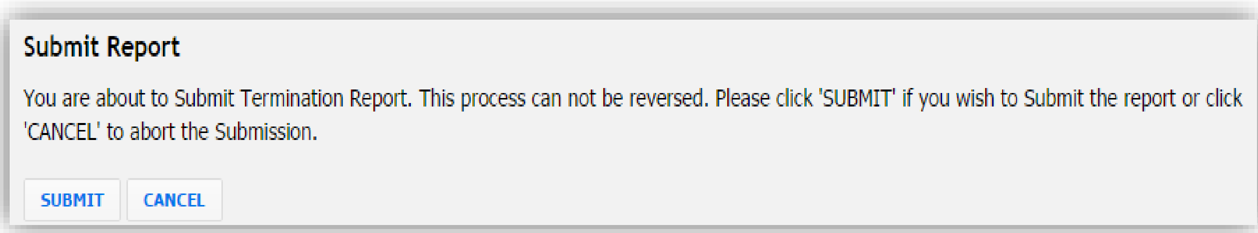
3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions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

Report Actions – (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.



3. A Termination Report submission cannot be reversed

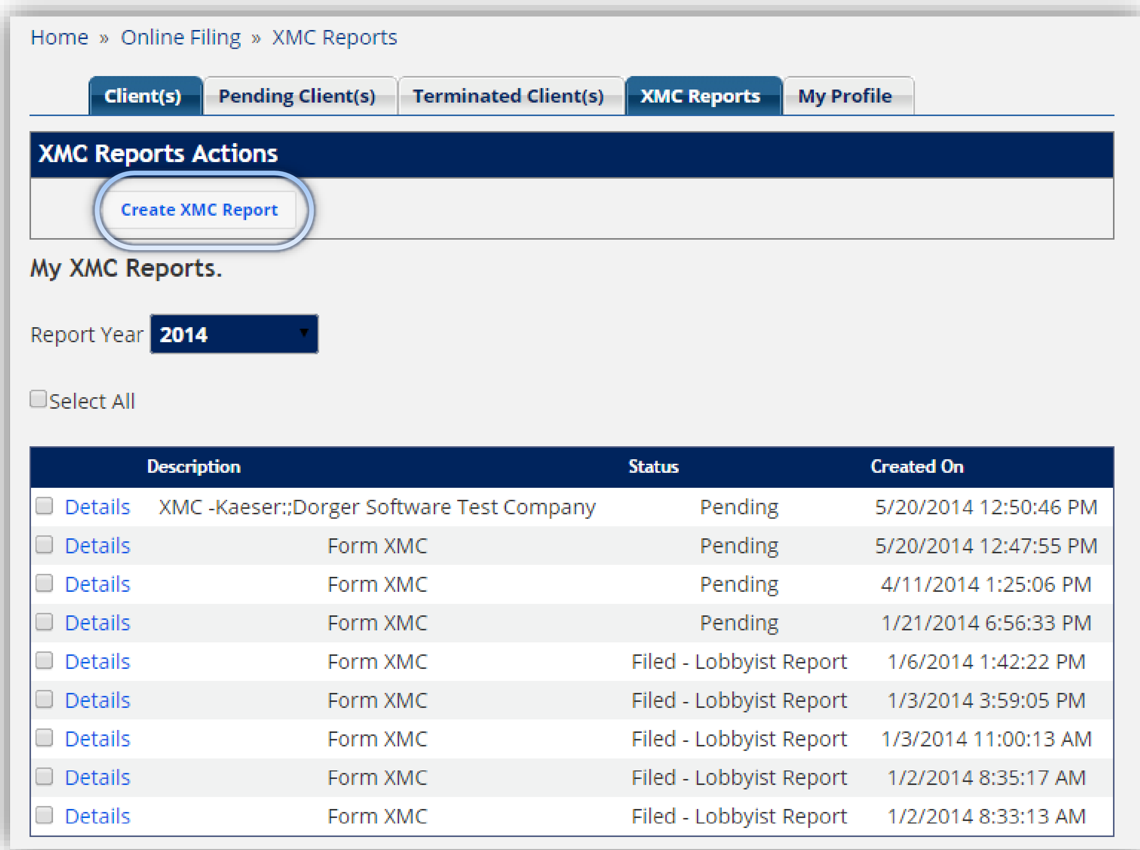


4. Click the **(SUBMIT)** button if you are ready to submit or click the **(CANCEL)** button if you are unsure.

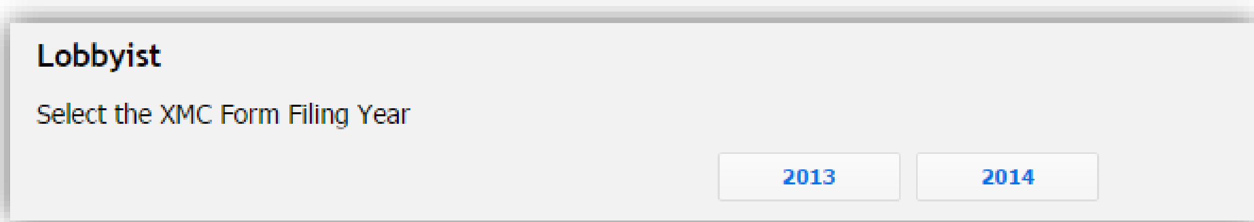
Top of the Document

Filing Reports as a Lobbyist with multiple clients-XMC Reports

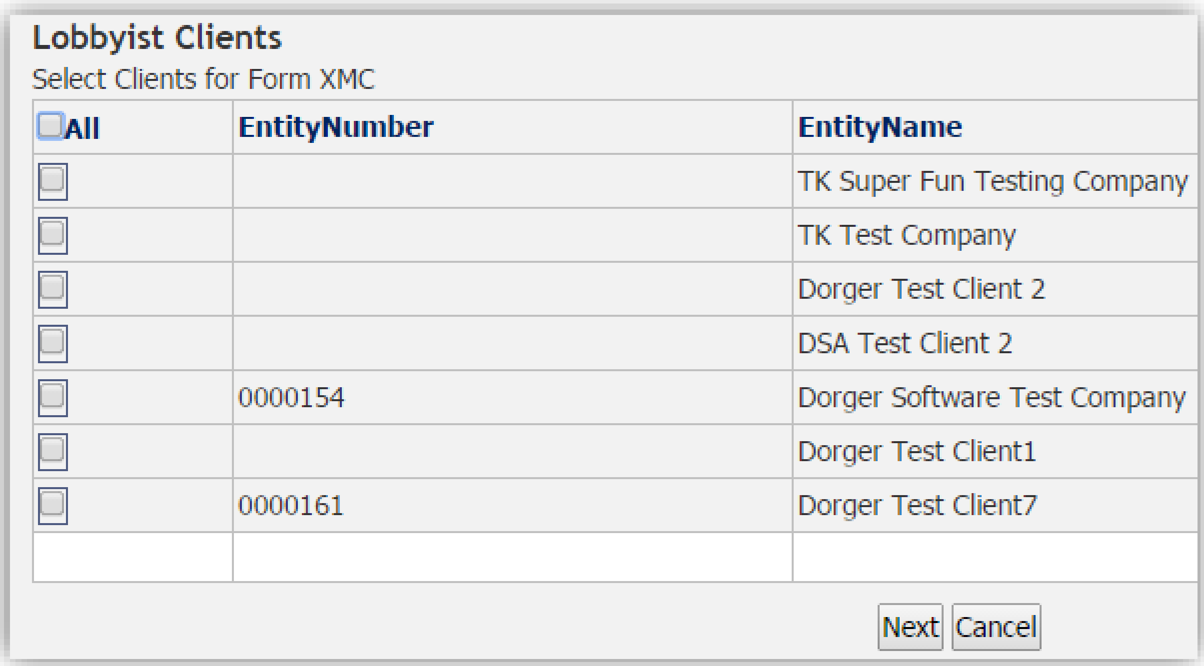
If you have multiple clients you may save time by filing a XMC Report and only when you have more than one client will the XMC Reports tab show.



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



2. Click on the Form Filing Year.



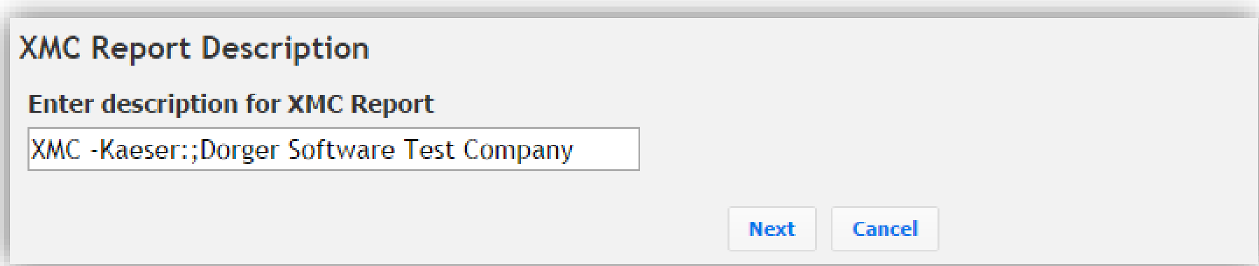
Lobbyist Clients

Select Clients for Form XMC

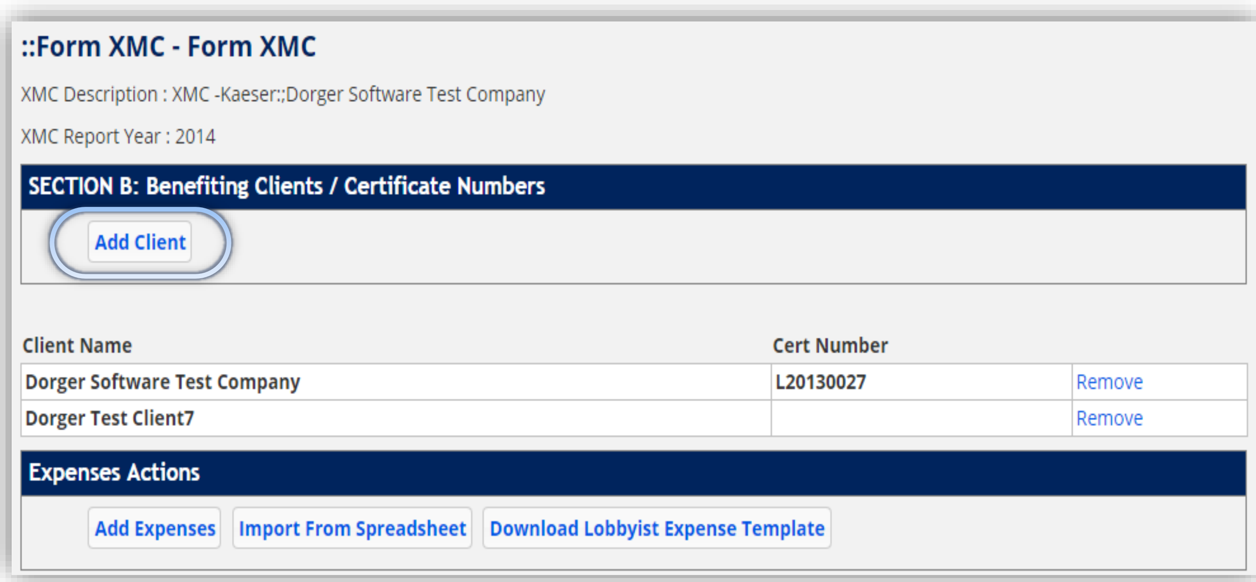
All	EntityNumber	EntityName
☐		TK Super Fun Testing Company
☐		TK Test Company
☐		Dorger Test Client 2
☐		DSA Test Client 2
☐	0000154	Dorger Software Test Company
☐		Dorger Test Client1
☐	0000161	Dorger Test Client7

Next Cancel

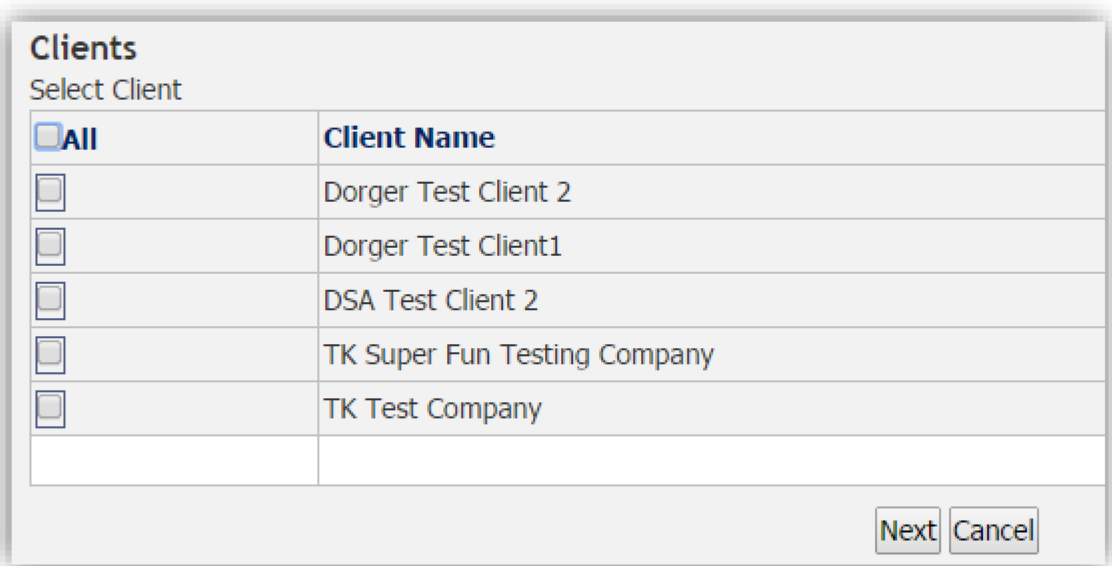
3. Click the [checkboxes] on the left that correspond with the Entities on the right that you need to file a XMC report for.
4. Click the **(Next)** button.



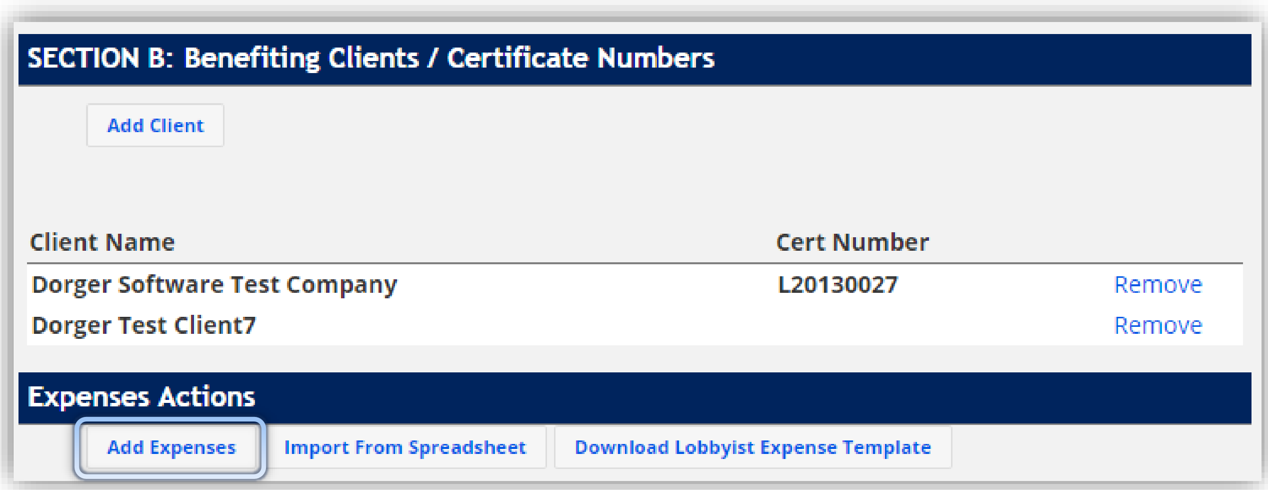
5. Here you may enter a description of the XMC Report in the text box.
6. Click the **(Next)** button.



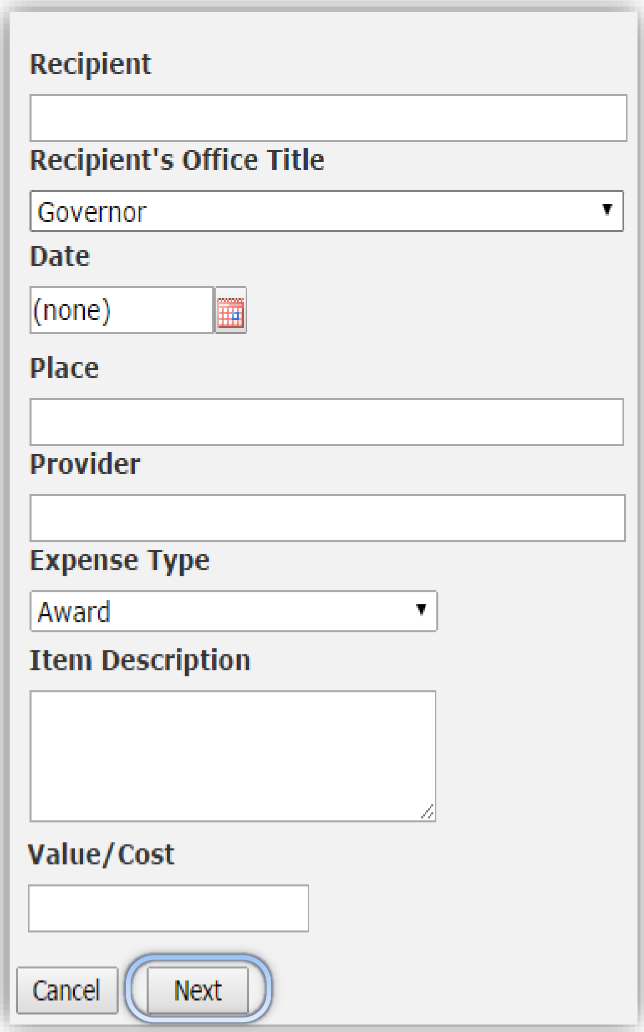
7. If you need to add a client to the report from this screen you may click the **(Add Client)** button.



- *If you have clients that can be added to the XMC report they will show on this page.*
- *Click the [checkbox] that corresponds with the client to add.*
- *Click the **(Next)** button.*

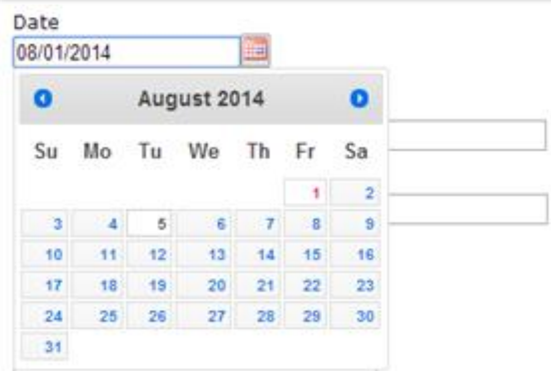


8. You may add expenses directly by clicking the **(Add Expenses)** button to be taken to the Lobbying Expenditure.
    - Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking 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.

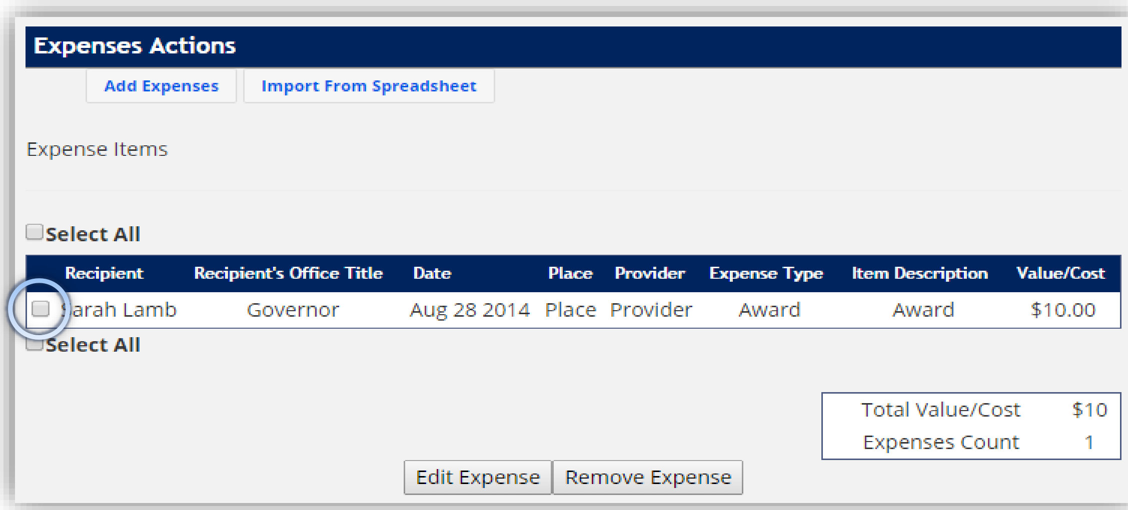


Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

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

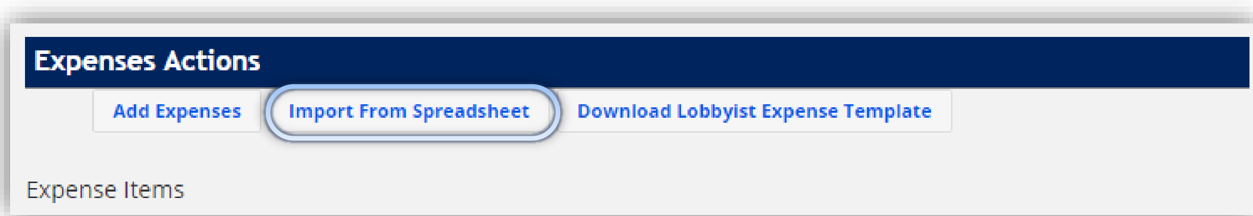


9. Click the next button when you have finished filling out the lobbyist expenditure.



10. Here you may edit or remove expenses by clicking on the [checkbox] that corresponds with the expense you wish to modify.
11. Click either the **(Edit Expense)** or the **(Remove Expense)** button. Edit Expense takes you back to the Lobbying expenditure and Remove Expense will delete the expense.

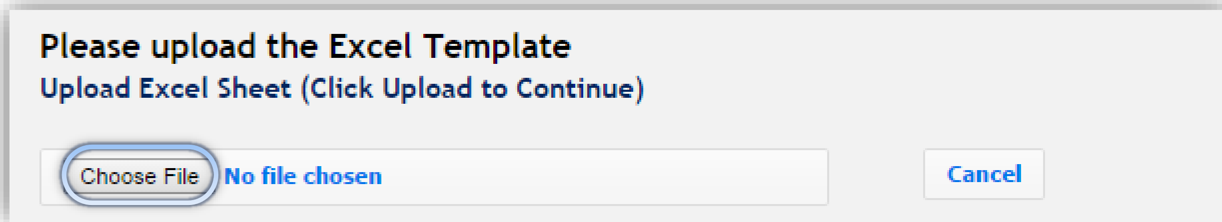
Import expenses from Spreadsheet- (XMC- report)



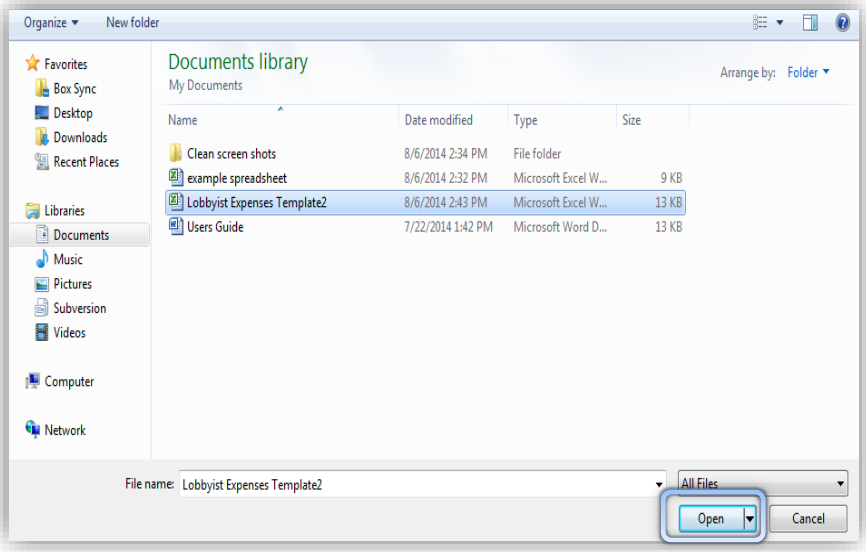
1. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

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).**

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

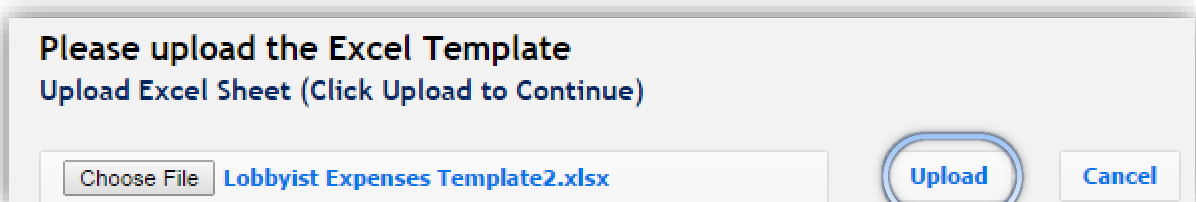


4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.

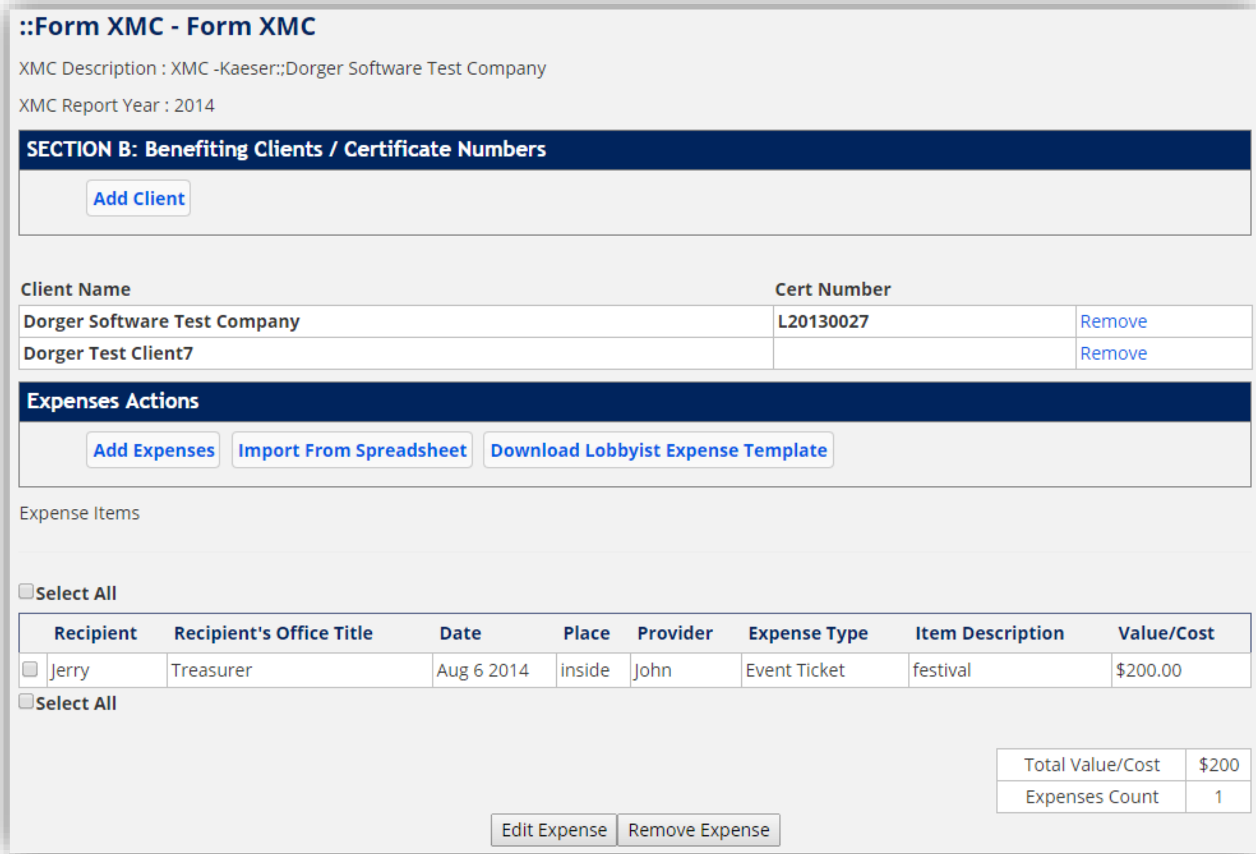


Click on the Excel Sheet you wish to upload and click the **(Open)** button.

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.



::Form XMC - Form XMC

XMC Description : XMC -Kaeser::Dorger Software Test Company

XMC Report Year : 2014

SECTION B: Benefiting Clients / Certificate Numbers

Add Client

Client Name	Cert Number	
Dorger Software Test Company	L20130027	Remove
Dorger Test Client7		Remove

Expenses Actions

Add Expenses | Import From Spreadsheet | Download Lobbyist Expense Template

Expense Items

Select All

	Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
☐	Jerry	Treasurer	Aug 6 2014	inside	John	Event Ticket	festival	$200.00

Select All

Total Value/Cost	$200
Expenses Count	1

Edit Expense | Remove Expense

12. At this point your report is filed and you may exit.

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