



CITY OF PHOENIX | CITY CLERK DEPARTMENT

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# Lobbyist Registration and Reporting Database User Guide



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# 1. SYSTEM OVERVIEW

This user guide provides instructions in how to use the new Lobbyist Registration and Reporting Database to register and report in accordance with Chapter 2, Article XXX of the Code of the City of Phoenix. To use this system, you will need to have an email to create a user account. Once you have an account, you can register lobbyists and begin reporting. As an administrator, you can also setup authorized users that will also be able to register and report. Authorized users can also be changed to administrator status. For questions about using this system, please contact us at lobbyist@phoenix.gov or 602-534-0490.

## 2 USER ACCOUNT ADMINISTRATION

### 2.1 USER ACCOUNT SETUP

1. Click the "User Account Setup" button on the site.



2. Enter your name, contact information, and your organization's information and click the Register button.

A screenshot of the 'User Account Setup' page. The page has a dark grey header with 'Lobbyist FAQs' on the left and 'User Account Setup', 'Search', and 'Log in' on the right. Below the header is an orange banner with the City of Phoenix logo and the text 'User Account Setup'. The main content area contains a heading: 'The user account setup page does not register you as an active lobbyist; it creates an account to use the system'. Below this is a paragraph: 'Fill out the information below to enroll in City of Phoenix Lobbyist Registration database. Once this information is submitted you will receive a verification email. After the account is verified you must then log in to register as a lobbyist'. The form is divided into three sections: 'Personal Info' with fields for First Name, Last Name, Phone, and Email; 'Organization Info' with fields for Organization Name, Street Address, City, State, and Zip; and 'Account Info' with fields for Password and Confirm Password. A 'Register' button is located at the bottom of the form. A red arrow points to the 'Register' button.

3. You will receive an email with a link requesting to verify the mail address you provided in the registration process.
4. Click the link in the email to verify your account. After the account is verified, you must then log in to register as a lobbyist.
5. Your account is now active. (However, you are not yet registered as a lobbyist.)

## 2.2 USER LOGIN PROCESS

1. Navigate to lobbyist registration and reporting system landing page and click on “Log in.”

The screenshot shows the top navigation bar with 'Lobbyist FAQs', 'User Account Setup', 'Search', and 'Log in'. Below this is the 'Log in' section with a form containing 'User Name' (example@phoenix.gov), 'Password', and a 'Remember me?' checkbox. A red arrow points to the 'Log in' button with the text 'Click to Log In'. Other annotations include 'Enter Username' and 'Enter Password' pointing to the respective input fields. At the bottom, there are links for 'User Account Setup' and 'Forgot your password?'. The footer contains 'phoenix.gov', 'Accessibility', 'Security and Privacy Statement', and '© Copyright 2017 City of Phoenix, all rights reserved'.

## 2.3 USER ACCOUNT MODIFICATION

1. Click on your email address in the navigation bar.

The screenshot shows the top navigation bar with 'Lobbyist FAQs', 'lobbyist@phoenix.gov', 'User Management', 'Search', and 'Log off'. A red arrow points to the 'lobbyist@phoenix.gov' link. Below this is the 'Reports and Information' section with the address '123, Inc. 200 W Washington St Phoenix AZ 85003' and a 'YEAR 2017' dropdown menu. A 'LOBBYIST CONTACTS' button is also visible. The footer contains 'phoenix.gov', 'Accessibility', 'Security and Privacy Statement', and '© Copyright 2017 City of Phoenix, all rights reserved'.

2. Click “Edit Information” to edit your information.

The screenshot shows the top navigation bar with 'Lobbyist FAQs', 'Home', 'lobbyist@phoenix.gov', 'User Management', 'Search', and 'Log off'. Below this is the 'Manage Account' section with two main areas: 'Personal Information' and 'Organization Information'. The 'Personal Information' section shows 'First Name John', 'Last Name Smith', 'Telephone (602) 321-4567', 'Email lobbyist@phoenix.gov', and 'Activated Yes'. The 'Organization Information' section shows 'Organization Name 123, Inc.', 'Address 200 W Washington St', 'City Phoenix', 'State AZ', and 'Zip 85003'. A red arrow points to the 'Edit Information' button. At the bottom, there is a 'Back to List' button. The footer contains 'phoenix.gov', 'Accessibility', 'Security and Privacy Statement', and '© Copyright 2017 City of Phoenix, all rights reserved'.

3. Change the information and click the “Change” button under the “Organization Information” section.

**Personal Info**

First Name

Last Name

Phone

Email

**Organization Info**


Organization Name

Address

City

State

Zip



**Change Password**

Current Password

New Password

Confirm New Password

## 2.4 CHANGING YOUR PASSWORD

1. From the “Manage Account” page, click the “Edit Information” button.
2. Enter your current password, the new password, and confirm the new password.
3. Click the “change” button under the “Change Password” section.

**Change Password**

Current Password

New Password

Confirm New Password

Security and Privacy Statement

## 2.5 PASSWORD RESET

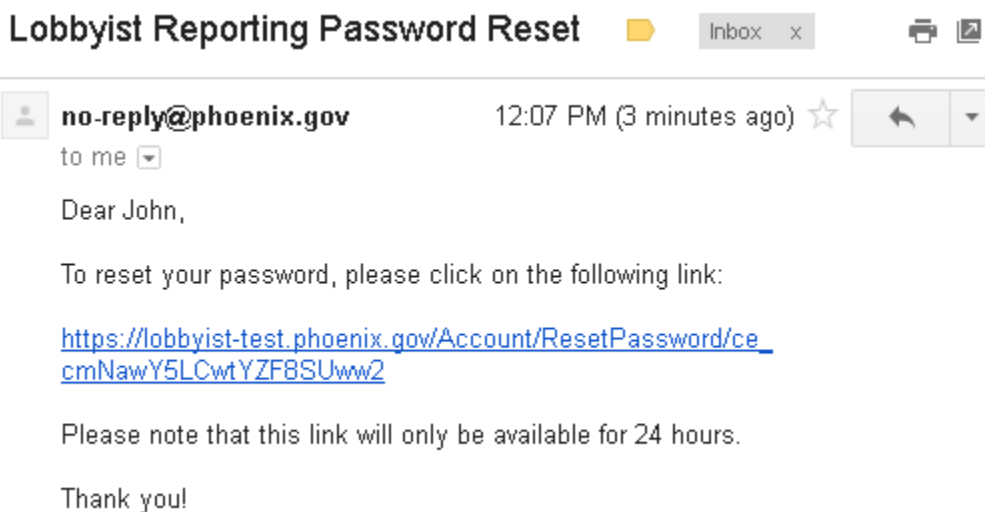
1. Navigate to the Lobbyist Reporting and Registration System “Log In” screen and click the “Forgot Your Password” link.

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2. Enter the email address associated with the account and click the “Email Link” button.

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3. An email will be sent to the provided email address with a link to reset the account password.



4. Click the link to be taken to the “Reset Password” page.



5. Enter and confirm the new password and click the “Change” button.

OFFICIAL WEB SITE OF THE  
City of Phoenix

## Reset Password

**Change Password**

New Password .....

Confirm Password .....

Change

phoenix.gov Accessibility Security and Privacy Statement  
© Copyright 2017 City of Phoenix, all rights reserved

6. Your password has been reset.

### 3 ACCOUNT HOMEPAGE

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#### 3.1 GETTING TO YOUR ORGANIZATION’S HOMEPAGE

1. At any time after logging in, you can click the “Home” button to get to your organization’s home page.



#### 3.2 OVERVIEW OF HOMEPAGE

1. Your organization’s homepage has a section for each of the following on the left side of the screen:
  - a. New Report
    - i. Initial Registrations and new Contribution and Expenditure reports.
  - b. Amend a Report
    - i. Make changes to already submitted forms.
  - c. Edit a Saved Form
    - i. Makes changes and updates to not yet submitted forms.
  - d. Total Contributions for \*Year\*
    - i. Running tally of contributions for the current year.
  - e. Total Expenditures for \*Year\*
    - i. Running tally of expenditures for current year.
  - f. View Reports for \*Year\*
    - i. Summary of all reports for year as of date report ran.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

YEAR 2017

LOBBYIST CONTACTS  
John Smith  
Jack Hill  
Jane Smith  
Jill Hill

Current Status: Registered

**New Report**

Register for 2018  
Contribution Report  
Expenditure Report

**Amend a Form**

Registration  
Exemption Statement

CONTRIBUTION FORM Q1 Q2 Q3  
EXPENDITURE FORM Q1 Q2

**Edit a Saved Form**

Registration  
CONTRIBUTION REPORTS  
EXPENDITURE REPORTS

**TOTAL CONTRIBUTIONS FOR 2017**

|                                |          |
|--------------------------------|----------|
| Total Contributions Made:      | \$55.00  |
| Total Contributions Solicited: | \$75.00  |
| Total Contributions:           | \$130.00 |

**TOTAL EXPENDITURES FOR 2017**

|                                    |         |
|------------------------------------|---------|
| Total Expenditures More Than \$25: | \$45.00 |
| Total Expenditures Less Than \$25: | \$10.00 |
| Total Event Expenditures:          | \$0.00  |
| Total Expenditures:                | \$55.00 |

View Report for 2017

**Registration Forms**

Filed Registration Forms  
Submitted Registration Forms  
Registration Opened for Edit  
11/17/2017  
Rejected Registration Forms

**Contribution Reports**

Filed Contribution Reports  
Submitted Contribution Reports  
Contribution Reports Open for Edit  
Rejected Contribution Reports

**Expenditure Reports**

Filed Expenditure Reports  
Submitted Expenditure Reports  
Expenditure Reports Open for Edit  
Rejected Expenditure Reports

**Exemption Statements**

Filed Exemption Statement  
Submitted Exemption Statements  
Exemption Statements Opened for Edit  
Rejected Exemption Statements

### 3.3 VIEWING REPORTS FOR A CALENDAR YEAR

1. Your organization's homepage has a section for each of the four report types on the right side of the screen:
  - a. Registration Forms
  - b. Quarterly Contribution Reports
  - c. Quarterly Expenditure Reports
  - d. Exemption Statement
2. Each section has four subsections to view different reports
  - a. Filed reports – These reports have been filed by the City Clerk Department. Once filed, a report cannot be edited. If a change needs to occur, an amendment report must be filed.
  - b. Submitted reports – These reports have been submitted and need to be reviewed and filed by the city clerk department. These reports can be opened to edit before the City Clerk department reviews them.
  - c. Reports open for edit – These reports have been edited and can only be viewed by members of your organization. To have them reviewed by the City Clerk department, resubmit the report.
  - d. Rejected reports – These reports have been reviewed and rejected by the City Clerk department. You can reopen the reports for edit before resubmitting it to be reviewed again.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

YEAR 2017 ▾

#### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

Current Status: Registered

#### New Report

Register for 2018

Contribution Report

Expenditure Report

#### Amend a Form

Registration

Exemption Statement

CONTRIBUTION FORM Q1 Q2 Q3

EXPENDITURE FORM Q1 Q2

#### Edit a Saved Form

Registration

CONTRIBUTION REPORTS

EXPENDITURE REPORTS

#### TOTAL CONTRIBUTIONS FOR 2017

|                                |          |
|--------------------------------|----------|
| Total Contributions Made:      | \$55.00  |
| Total Contributions Solicited: | \$75.00  |
| Total Contributions:           | \$130.00 |

#### TOTAL EXPENDITURES FOR 2017

|                                    |         |
|------------------------------------|---------|
| Total Expenditures More Than \$25: | \$45.00 |
| Total Expenditures Less Than \$25: | \$10.00 |
| Total Event Expenditures:          | \$0.00  |
| Total Expenditures:                | \$55.00 |

View Report for 2017

#### Registration Forms

Filed Registration Forms ▾

Submitted Registration Forms ▾

Registration Opened for Edit ▲

11/17/2017

Rejected Registration Forms ▾

#### Contribution Reports

Filed Contribution Reports ▾

Submitted Contribution Reports ▾

Contribution Reports Open for Edit ▾

Rejected Contribution Reports ▾

#### Expenditure Reports

Filed Expenditure Reports ▾

Submitted Expenditure Reports ▾

Expenditure Reports Open for Edit ▾

Rejected Expenditure Reports ▾

#### Exemption Statements

Filed Exemption Statement ▾

Submitted Exemption Statements ▾

Exemption Statements Opened for Edit ▾

Rejected Exemption Statements ▾

### 3.4 VIEWING FINANCIAL INFORMATION FOR A CALENDAR YEAR

1. On the top right of the page is a section showing you each registered lobbyist in the organization.
2. On the bottom left of the page is a section showing you the total contributions and expenditures reported so far for the current year.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

Current Status: Registered

### New Report

Register for 2018

Contribution Report

Expenditure Report

### Amend a Form

Registration

Exemption Statement

CONTRIBUTION FORM **Q1** Q2 Q3

EXPENDITURE FORM Q1 Q2

### Edit a Saved Form

Registration

CONTRIBUTION REPORTS

EXPENDITURE REPORTS



| TOTAL CONTRIBUTIONS FOR 2017   |          |
|--------------------------------|----------|
| Total Contributions Made:      | \$55.00  |
| Total Contributions Solicited: | \$75.00  |
| Total Contributions:           | \$130.00 |



| TOTAL EXPENDITURES FOR 2017        |         |
|------------------------------------|---------|
| Total Expenditures More Than \$25: | \$45.00 |
| Total Expenditures Less Than \$25: | \$10.00 |
| Total Event Expenditures:          | \$0.00  |
| Total Expenditures:                | \$55.00 |

View Report for 2017

YEAR 2017 ▼

### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill



### Registration Forms

Filed Registration Forms ▼

Submitted Registration Forms ▼

Registration Opened for Edit ▲

11/17/2017

Rejected Registration Forms ▼

### Contribution Reports

Filed Contribution Reports ▼

Submitted Contribution Reports ▼

Contribution Reports Open for Edit ▼

Rejected Contribution Reports ▼

### Expenditure Reports

Filed Expenditure Reports ▼

Submitted Expenditure Reports ▼

Expenditure Reports Open for Edit ▼

Rejected Expenditure Reports ▼

### Exemption Statements

Filed Exemption Statement ▼

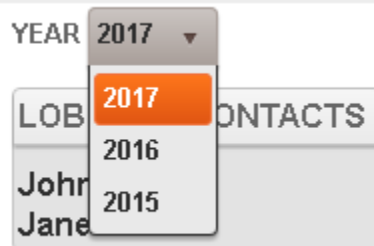
Submitted Exemption Statements ▼

Exemption Statements Opened for Edit ▼

Rejected Exemption Statements ▼

## 3.5 CHANGING THE CALENDAR YEAR

1. On the top right of the page is a list of all the years that your organization has filed reports for.
2. Changing the year in this list changes the view to show information for that year.





## 4 SUBMITTING FORMS

### 4.1 REGISTRATION REPORT

1. Click the link to create a new registration report for the year.
2. Fill out the Organization Information section of the form.
3. Fill out the lobbyist section of the form
  - a. To add a new row, click the “+” button at the top of the table.
  - b. To remove a row, click the delete button for that row.
4. Fill out the client section of the form
  - a. To add a new row, click the “+” button at the top of the table.
  - b. To remove a row, click the delete button for that row.
5. If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
6. When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
7. The form will show up under the “Submitted Registration Forms” section of your home page.
8. When the form has been filed by the City Clerk Department, it will show up under the “Filed Registration Forms” section of your homepage.

The screenshot displays the 'Reports and Information' section of the City of Phoenix lobbyist registration system. At the top, there is a navigation bar with 'Lobbyist FAQs', 'Home', 'teresariza5@gmail.com', 'User Management', 'Search', and 'Log off'. Below this, the user's profile information is shown: 'ABC, Inc', '19425 N 11th St', 'Phoenix, AZ, 85024'. A 'YEAR 2017' dropdown menu and a 'LOBBYIST CONTACTS' button are also visible. The current status is 'Pending Registration'. A red warning message states: 'TO REGISTER YOURSELF, YOUR ORGANIZATION OR YOUR EMPLOYEES AS LOBBYISTS WITH CITY OF PHOENIX FILL OUT AND SUBMIT THE REGISTRATION FORM.' Under the 'New Report' section, there are buttons for 'Register for 2018', 'Registration', and 'Amend Form'. A red arrow points to the 'Register for 2018' button. The 'Registration Forms' section includes dropdown menus for 'Filed Registration Forms', 'Submitted Registration Forms', and 'Registration Opened for Edit'.

#### Notes:

1. You can only have one registration report per year, so the new registration report button will only appear if you haven't already submitted one.
2. If you need to modify an existing registration, please see the Instruction for Registration Report Amendment below.
3. You cannot submit a new registration report if your organization has been suspended or prohibited from registering.
4. Starting December 1<sup>st</sup> of the current calendar year, you may submit a registration for the next calendar year.

### 4.2 REGISTRATION REPORT AMENDMENT

1. Click the link to create a registration report amendment for the year as changes occur.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

YEAR 2017 ▼

**LOBBYIST CONTACTS**

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

Current Status: Registered

**New Report**

Register for 2018

Contribution Report

Expenditure Report

**Amend a Form**

Registration



Exemption Statement

CONTRIBUTION FORM Q1 Q2 Q3

EXPENDITURE FORM Q1 Q2

**Registration Forms**

Filed Registration Forms ▼

Submitted Registration Forms ▼

Registration Opened for Edit ▲

11/17/2017

Rejected Registration Forms ▼

**Contribution Reports**

Filed Contribution Reports ▼

Submitted Contribution Reports ▼

2. Make any changes that need to be made
3. When you are ready to submit read and complete the signature declaration form by checking the box and and typing your name and email address.
4. The form will show up under the "Submitted Registration Forms" section of your home page.

**Registration Form**

|                                |
|--------------------------------|
| Filed Registration Forms ▼     |
| Submitted Registration Forms ▲ |
| 7/24/2017                      |
| Registration Opened for Edit ▼ |
| Rejected Registration Forms ▼  |



- When the form has been filed by the City Clerk Department, it will show up under the “Filed Registration Forms” section of your homepage, under the date it was filed.

### Registration Form

|                                |
|--------------------------------|
| Filed Registration Forms ▲     |
| 2017 Registration Form         |
| Amendment 1 - 7/21/2017        |
| Amendment 2 - 7/24/2017        |
| Amendment 3 - 7/24/2017        |
| Submitted Registration Forms ▼ |
| Registration Opened for Edit ▼ |
| Rejected Registration Forms ▼  |



### 4.3 QUARTERLY EXPENDITURE REPORT

- Click the link to create a new quarterly expenditure report to document any lobbying expenditures that are subject to reporting requirements.

123, Inc.  
 200 W Washington St  
 Phoenix, AZ, 85003  
 (602) 113-4567

YEAR 2017 ▼

**LOBBYIST CONTACTS**

John Smith  
 Jack Hill  
 Jane Smith  
 Jill Hill

Current Status: Registered

#### New Report

- Register for 2018
- Contribution Report
- Expenditure Report



#### Amend a Form

- Registration
- Exemption Statement
- CONTRIBUTION FORM Q1 Q2 Q3
- EXPENDITURE FORM Q1 Q2

#### Registration Forms

|                                |
|--------------------------------|
| Filed Registration Forms ▼     |
| Submitted Registration Forms ▼ |
| Registration Opened for Edit ▲ |
| 11/17/2017                     |
| Rejected Registration Forms ▼  |

#### Contribution Reports

|                                  |
|----------------------------------|
| Filed Contribution Reports ▼     |
| Submitted Contribution Reports ▼ |

- Select the quarter that this report is for. Note that quarters for which a report has already been filed will be grayed out and unavailable to select.

Date: 7/24/2017 Select Quarter  1  2  3  4

**Business Information**

|                                          |                                     |
|------------------------------------------|-------------------------------------|
| <b>Business Type</b> Organization        | <b>Address</b> 2411 W Washington St |
| <b>Business Name</b> ABC Inc             | <b>City</b> Phoenix                 |
| <b>Business Telephone</b> (111) 222-3333 | <b>State</b> AZ                     |
|                                          | <b>Zip</b> 85000                    |

- Each registered lobbyist shows up as a tab on the report and you may switch lobbyists by clicking their names

John Smith

Jack Hill

Jane Smith

Jill Hill

Click a tab to change to

**Name** John Smith **Email** john@123.com  **No Expenditures**

**LIST SINGLE EXPENDITURES MORE THAN \$25.**

- Fill out the Expenditures More than \$25 section, Expenditures Less than \$25 section, and the Expenditures for Events section for each lobbyist in the organization.
  - To add a new row, click the "+" button at the top of the table.
  - To remove a row, click the delete button for that row.

**LIST SINGLE EXPENDITURES \$25 OR LESS** and NAME OF CITY OFFICIAL receiving or benefitting from expenditures.

| Name of City Official                     | Amount of Expenditure                    | +          |
|-------------------------------------------|------------------------------------------|------------|
| <input style="width: 95%;" type="text"/>  | <input style="width: 95%;" type="text"/> | +          |
| <input style="width: 95%;" type="text"/>  | <input style="width: 95%;" type="text"/> | -          |
| <b>Total of Expenditures \$25 or Less</b> |                                          | <b>\$0</b> |

**LIST ALL EXPENDITURES FOR EVENTS.**

| Date                                     | Description of Event                     | Location                                                                                                                                                                                             | Total Expenditures                       | + |
|------------------------------------------|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|---|
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> Street Address<br><input style="width: 25%;" type="text"/> City <input style="width: 15%;" type="text"/> State <input style="width: 15%;" type="text"/> Zip | <input style="width: 95%;" type="text"/> | + |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> Street Address<br><input style="width: 25%;" type="text"/> City <input style="width: 15%;" type="text"/> State <input style="width: 15%;" type="text"/> Zip | <input style="width: 95%;" type="text"/> | - |
| <b>Total of Event Expenditures</b>       |                                          |                                                                                                                                                                                                      | <b>\$0</b>                               |   |

**Total Expenditures: \$0**

- If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
- When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
- Under the "Filed Expenditure Reports" section on your homepage, the report will show up under the quarter it was filed.



## Expenditure Reports

|                                     |
|-------------------------------------|
| Filed Expenditure Reports ▲         |
| Quarter 1                           |
| Quarter 2                           |
| <b>Quarter 3 ▲</b>                  |
| 2017 Q3 Expenditure Report ←        |
| Quarter 4                           |
| Submitted Expenditure Reports ▼     |
| Expenditure Reports Open for Edit ▼ |
| Rejected Expenditure Reports ▼      |

### 4.4 QUARTERLY EXPENDITURE REPORT AMENDMENT

1. Under the “Amend a Form” section, under the “Expenditure Form” section, click the quarterly form you wish to amend
  - a. You cannot change the quarter for the submitted form.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

Current Status: Registered

#### New Report

Register for 2018  
Contribution Report  
Expenditure Report

#### Amend a Form

Registration  
Exemption Statement

CONTRIBUTION FORM Q1 Q2 Q3

EXPENDITURE FORM Q1 Q2 ←

YEAR 2017 ▼

#### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

#### Registration Forms

Filed Registration Forms ▼  
Submitted Registration Forms ▼  
Registration Opened for Edit ▲  
11/17/2017  
Rejected Registration Forms ▼


#### Contribution Reports

Filed Contribution Reports ▼  
Submitted Contribution Reports ▼

2. Make the changes you want to make to form.
3. If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
4. When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
5. The form will show up under the “Submitted Expenditure Reports” section, under the quarter it is being submitted for.

## Expenditure Reports

|                                   |   |
|-----------------------------------|---|
| Filed Expenditure Reports         | ▼ |
| Submitted Expenditure Reports     | ▲ |
| Quarter 1                         |   |
| Quarter 2                         |   |
| Quarter 3                         | ▲ |
| 7/21/2017                         |   |
| Quarter 4                         |   |
| Expenditure Reports Open for Edit | ▼ |
| Rejected Expenditure Reports      | ▼ |



6. When the form has been filed by the City Clerk Department, it will show up under the “Filed Expenditure Reports” section, under the quarter it was filed.

### 4.5 QUARTERLY CONTRIBUTION REPORT

1. Click the link to create a new quarterly contribution report to document any Campaign Contributions made or solicited subject to reporting requirements.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

Current Status: Registered

#### New Report

Register for 2018  
Contribution Report  
Expenditure Report



#### Amend a Form

Registration  
Exemption Statement  
CONTRIBUTION FORM Q1 Q2 Q3  
EXPENDITURE FORM Q1 Q2

YEAR 2017 ▼

#### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

#### Registration Forms

|                              |   |
|------------------------------|---|
| Filed Registration Forms     | ▼ |
| Submitted Registration Forms | ▼ |
| Registration Opened for Edit | ▲ |
| 11/17/2017                   |   |
| Rejected Registration Forms  | ▼ |

#### Contribution Reports

|                                |   |
|--------------------------------|---|
| Filed Contribution Reports     | ▼ |
| Submitted Contribution Reports | ▼ |

2. Select the quarter that this report is for.

- Each registered lobbyist shows up as a tab on the report and you may switch lobbyists by clicking their names. If no contributions were made by a lobbyist during a quarter leave those fields blank.

John Smith   Jack Hill   Jane Smith   Jill Hill    Click a tab to change to tha

**Name** John Smith **Email** john@123.com **IF NO CONTRIBUTIONS WERE MADE BY THIS LOBBYIST IN THIS QUARTER, PLEASE LEAVE FIELDS BELOW BLANK.**

**Contributions Made**

- Fill out the Contributions Made section and Contributions Solicited section for each lobbyist in the organization.
  - To add a new row, click the “+” button at the top of the table.
  - To remove a row, click the delete button for that row.

| Contributions Made              |                                      |                        |                                                                |
|---------------------------------|--------------------------------------|------------------------|----------------------------------------------------------------|
| Date                            | City Official Receiving Contribution | Amount of Contribution | +                                                              |
| <input type="text"/>            | <input type="text"/>                 | <input type="text"/>   | <input data-bbox="1388 661 1421 703" type="button" value="+"/> |
| <input type="text"/>            | <input type="text"/>                 | <input type="text"/>   | <input data-bbox="1388 724 1421 766" type="button" value="⊗"/> |
| <b>Total Contributions Made</b> |                                      | <b>\$0</b>             | <input data-bbox="1388 787 1421 829" type="button" value="⊗"/> |

 Click here to add a new row

 Click here to delete a row

| Contributions Solicited |                                                                               |                                        |                                      |                        |                                                                  |
|-------------------------|-------------------------------------------------------------------------------|----------------------------------------|--------------------------------------|------------------------|------------------------------------------------------------------|
| Date                    | Name and Address of Contributor                                               | Occupation and Employer of Contributor | City Official Receiving Contribution | Amount of Contribution | +                                                                |
| <input type="text"/>    | Name <input type="text"/>                                                     | Occupation <input type="text"/>        | <input type="text"/>                 | <input type="text"/>   | <input data-bbox="1388 934 1421 976" type="button" value="+"/>   |
| <input type="text"/>    | Street Address <input type="text"/>                                           | Employer <input type="text"/>          | <input type="text"/>                 | <input type="text"/>   | <input data-bbox="1388 1039 1421 1081" type="button" value="⊗"/> |
| <input type="text"/>    | City <input type="text"/> State <input type="text"/> Zip <input type="text"/> |                                        |                                      |                        |                                                                  |

- If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
- When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
- Under the “Filed Contribution Reports” section on your homepage, the report will show up under the quarter it was filed.

## Contribution Reports

- Filed Contribution Reports ▲
- Quarter 1 ▲
- 2017 Q1 Contribution Report
- Quarter 2
- Quarter 3
- Quarter 4 ▼
- Submitted Contribution Reports ▼
- Contribution Reports Open for Edit ▼
- Rejected Contribution Reports ▼



## 4.6 QUARTERLY CONTRIBUTION REPORT AMENDMENT

1. If you need to modify a contribution report that you have already submitted, under the "Amend a Form" section, on the "Contribution Form" row, click the quarterly form you wish to amend.
  - a. You cannot change the quarter for the submitted form.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

YEAR 2017 ▾

### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

Current Status: Registered

### New Report

Register for 2018  
Contribution Report  
Expenditure Report

### Amend a Form

Registration  
Exemption Statement

CONTRIBUTION FORM Q1 Q2 Q3

EXPENDITURE FORM Q1 Q2



### Registration Forms

Filed Registration Forms ▾  
Submitted Registration Forms ▾  
Registration Opened for Edit ▲  
11/17/2017  
Rejected Registration Forms ▾

### Contribution Reports

Filed Contribution Reports ▾  
Submitted Contribution Reports ▾

2. Make the changes you want to make to form.
3. If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
4. When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
5. The form will show up under the "Submitted Contribution Reports" section, under the quarter it is being submitted for.
6. When the form has been filed by the City Clerk Department, it will show up under the "Filed Contribution Reports" section, under the quarter it was filed.

## Contribution Reports

Filed Contribution Reports ▾  
Submitted Contribution Reports ▲  
Quarter 1 ▲  
7/21/2017  
Quarter 2  
Quarter 3  
Quarter 4  
Contribution Reports Open for Edit ▾  
Rejected Contribution Reports ▾





## 4.7 EXEMPTION STATEMENT

This form is completed if a lobbyist will have no expenditures for the year.

1. Click the link to create an exemption statement.
2. Check the lobbyists that should be exempt from reporting expenditures for the year.
3. If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
4. When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.
5. The form will show up under the "Filed Exemption Forms" section on your homepage.

### Exemption Statements

|                                        |
|----------------------------------------|
| Filed Exemption Statement ▲            |
| 2017 Exemption Statement               |
| Amendment 1 - 11/30/2017               |
| Submitted Exemption Statements ▲       |
| Exemption Statements Opened for Edit ▼ |
| Rejected Exemption Statements ▼        |

## 4.8 EXEMPTION STATEMENT AMENDMENT

1. If you need to amend an existing Exemption statement, look under the "Amend a Form" section, and click the "Exemption Statement" button.

123, Inc.  
200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

Current Status: Registered

### New Report

Register for 2018

Contribution Report

Expenditure Report

### Amend a Form

Registration

Exemption Statement 

CONTRIBUTION FORM Q1 Q2 Q3

EXPENDITURE FORM Q1 Q2

YEAR 2017 ▼

### LOBBYIST CONTACTS

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

### Registration Forms

Filed Registration Forms ▼

Submitted Registration Forms ▼

Registration Opened for Edit ▲

11/17/2017

Rejected Registration Forms ▼

### Contribution Reports

Filed Contribution Reports ▼

Submitted Contribution Reports ▼

2. Check the lobbyists that should be exempt from reporting expenditures for the year, and uncheck the lobbyists that should not be exempt.
3. If you need more time to complete this form and/or you are not yet ready to submit it, hit the "Save" button. The form will remain available under the "Edit a Saved Form" section.
4. When you are ready to submit, read and complete the signature declaration form by checking the box and typing your name and email address.

5. The form will show up under the "Submitted Exemption Forms" section on your homepage.

## Exemption Forms

|                           |   |
|---------------------------|---|
| Filed Exemption Forms     | ▼ |
| Submitted Exemption Forms | ▲ |
| 7/24/2017                 |   |
| Exemption Opened for Edit | ▼ |
| Rejected Exemption Forms  | ▼ |

6. When the form has been filed by the City Clerk Department, it will show up under the "Filed Exemption Forms" section of your homepage, under the date it was filed.

### 4.9 SAVING REPORTS TO EDIT LATER

1. All forms can be saved to be edited later.
2. Once the form is at a state that you are ready to save, click the "Save" button, next to the "Submit" button at the bottom of the screen.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| <b>Total Contributions Solicited</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                     |
| <input type="checkbox"/> <b>BY CHECKING THIS BOX AND TYPING MY NAME BELOW, THE UNDERSIGNED DOES HEREBY CERTIFY UNDER PENALTY OF PERJURY THAT: (1) ALL THE INFORMATION CONTAINED IN THE REPORTING FORM IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE; (2) I AM A REGISTERED LOBBYIST FILING THIS REPORT ON MY OWN BEHALF OR I AM DULY AUTHORIZED TO FILE THIS REPORT ON BEHALF OF THE REGISTERED LOBBYING ENTITY NAMED ON THE REPORTING FORM; AND (3) BY TYPING MY NAME BELOW I ACKNOWLEDGE THAT SUCH ACTION CONSTITUTES THE LEGAL EQUIVALENT OF MY SIGNATURE AND BY TYPING MY NAME I HEREBY WAIVE ANY REQUIREMENT THAT THIS FORM BE NOTARIZED IN ORDER TO BE LEGALLY ENFORCEABLE.</b> |                                     |
| TYPED NAME                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | EMAIL ADDRESS                       |
| <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <input type="text"/>                |
| <input type="button" value="Submit"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="button" value="Save"/> |

3. The report will show up under the "Open for edit" section on your homepage.

|                                           |   |
|-------------------------------------------|---|
| <b>Contribution Reports Open for Edit</b> |   |
| Quarter 1                                 |   |
| Quarter 2                                 |   |
| Quarter 3                                 |   |
| Quarter 4                                 | ▲ |
| 12/8/2017                                 |   |

4. The report is not complete until you read and complete the signature declaration and hit "submit".

# 5 REPORTS

## 5.1 VIEWING ANNUAL FINANCIAL REPORTS

1. From your organization's homepage, on the bottom-right of the page, click the button to "View Report for <year>" for the calendar year you want to see the report for.

200 W Washington St  
Phoenix, AZ, 85003  
(602) 113-4567

---

Current Status: Registered

**New Report**

Register for 2018  
Expenditure Report

**Amend a Form**

Registration  
Exemption Statement

CONTRIBUTION FORM

EXPENDITURE FORM

**Edit a Saved Form**

Registration


CONTRIBUTION REPORTS

EXPENDITURE REPORTS

| TOTAL CONTRIBUTIONS FOR 2017   |          |
|--------------------------------|----------|
| Total Contributions Made:      | \$65.00  |
| Total Contributions Solicited: | \$75.00  |
| Total Contributions:           | \$140.00 |

| TOTAL EXPENDITURES FOR 2017        |         |
|------------------------------------|---------|
| Total Expenditures More Than \$25: | \$45.00 |
| Total Expenditures Less Than \$25: | \$10.00 |
| Total Event Expenditures:          | \$0.00  |
| Total Expenditures:                | \$55.00 |



**LOBBYIST CONTACTS**

John Smith  
Jack Hill  
Jane Smith  
Jill Hill

**Registration Forms**

Filed Registration Forms  
Submitted Registration Forms  
Registration Opened for Edit  
11/17/2017  
Rejected Registration Forms

**Contribution Reports**

Filed Contribution Reports  
Submitted Contribution Reports  
Contribution Reports Open for Edit  
Quarter 1  
Quarter 2  
Quarter 3  
Quarter 4  
12/8/2017  
Rejected Contribution Reports

**Expenditure Reports**

Filed Expenditure Reports  
Submitted Expenditure Reports  
Expenditure Reports Open for Edit  
Rejected Expenditure Reports

**Exemption Statements**

Filed Exemption Statement

2. A report will be generated and delivered as a PDF file.

 **Organization Report**  
Year 2017

**123, Inc.**  
(602) 113-4567

200 W Washington St  
Phoenix, AZ, 85003

| Person     | Phone | Exempt | Registration Date |
|------------|-------|--------|-------------------|
| Jack Hill  |       | True   | 11/17/2017        |
| Jane Smith |       | False  | 11/17/2017        |
| Jill Hill  |       | True   | 11/17/2017        |
| John Smith |       | False  | 11/17/2017        |

| Contributions              | Amount          |
|----------------------------|-----------------|
| Made                       | \$65.00         |
| Solicited                  | \$75.00         |
| <b>Total Contributions</b> | <b>\$140.00</b> |

| Expenditures              | Amount         |
|---------------------------|----------------|
| LessThan25                | \$10.00        |
| MoreThan25                | \$45.00        |
| <b>Total Expenditures</b> | <b>\$55.00</b> |

# 6 ADMINISTERING USER Accounts For Your Organization

Note: The User Management area allows for management of who has access to create, modify, and submit reports. Types of access is also managed from this area.

## 6.1 VIEWING ALL USERS IN THE ORGANIZATION

1. Once logged into the system, click the “User management” button.



2. Here you can see a list of all users with accounts that are able to log in and file reports using this system.
  - a. Authorized Users are users who can submit reports.
  - b. Administrators are users who can submit reports as well as create and administer users for the organization.



## 6.2 ADDING NEW USERS (ADMINISTRATOR FUNCTION)

1. When logged in as an administrator of your organization, go to the “User Management” page and click the “Create a New User” button.



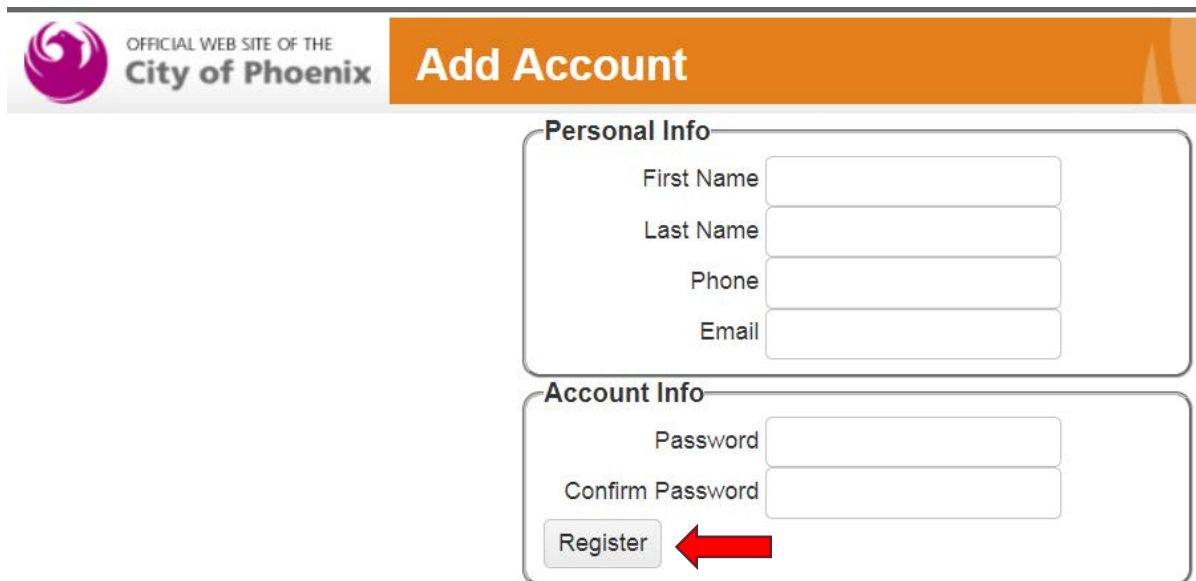
Lobbyist FAQs Home lobbyist@phoenix.gov User Management Log off

OFFICIAL WEB SITE OF THE City of Phoenix

### View Users

- Create a New User
- Administrators ▲
  - John Smith
- Authorized Users ▲
  - Jane Smith
  - Jane Hill

2. Enter the information for this user, including a password for them to use to log into the system and click the “Register” button.



OFFICIAL WEB SITE OF THE City of Phoenix

## Add Account

**Personal Info**

First Name

Last Name

Phone

Email

**Account Info**

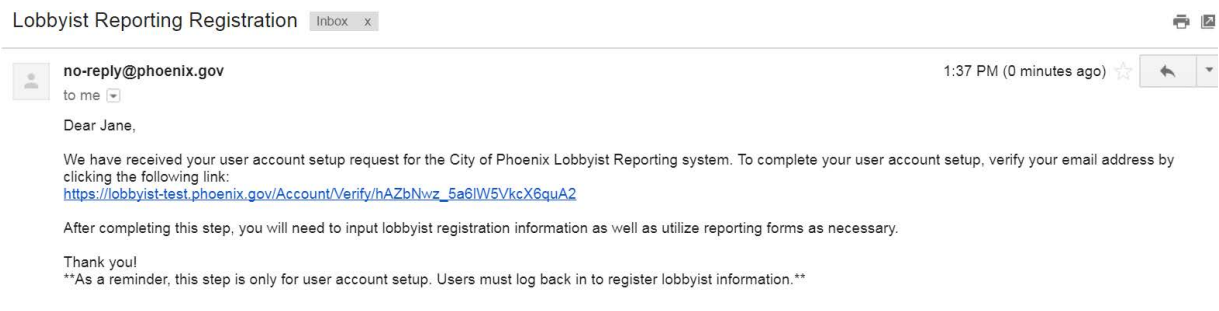
Password

Confirm Password

Register

phoenix.gov Accessibility Security and Privacy Statement  
© Copyright 2017 City of Phoenix, all rights reserved

3. An email is sent to the user with instructions on how to verify the account.



Lobbyist Reporting Registration Inbox x

no-reply@phoenix.gov 1:37 PM (0 minutes ago)

to me

Dear Jane,

We have received your user account setup request for the City of Phoenix Lobbyist Reporting system. To complete your user account setup, verify your email address by clicking the following link:  
[https://lobbyist-test.phoenix.gov/Account/Verify/hAZbNwz\\_5a6lW5VkcX6quA2](https://lobbyist-test.phoenix.gov/Account/Verify/hAZbNwz_5a6lW5VkcX6quA2)

After completing this step, you will need to input lobbyist registration information as well as utilize reporting forms as necessary.

Thank you!  
\*\*As a reminder, this step is only for user account setup. Users must log back in to register lobbyist information.\*\*



### 6.3 EDITING USER INFORMATION (ADMINISTRATOR FUNCTION)

1. When logged in as an administrator of your organization, go to the “User Management” page.
2. Click the name of the user you want to edit.

Lobbyist FAQs Home lobbyist@phoenix.gov User Management Log off

OFFICIAL WEB SITE OF THE City of Phoenix

## View Users

- Create a New User
- Administrators
  - John Smith
- Authorized Users**
  - Jane Smith
  - Jane Hill

3. Click the “Edit Information” button.

OFFICIAL WEB SITE OF THE City of Phoenix

## Manage Account

**Personal Information**  
First Name Jane  
Last Name Smith  
Telephone (602) 123-4567  
Email jane@123.com  
Activated No

**Organization Information**  
Organization Name 123, Inc.  
Address 200 W Washington St  
City Phoenix  
State AZ  
Zip 85003

|  |  |

4. Edit the information for this user and click the “Change” button under the “Organization Information” section.

### Organization Info

Organization Name

Address

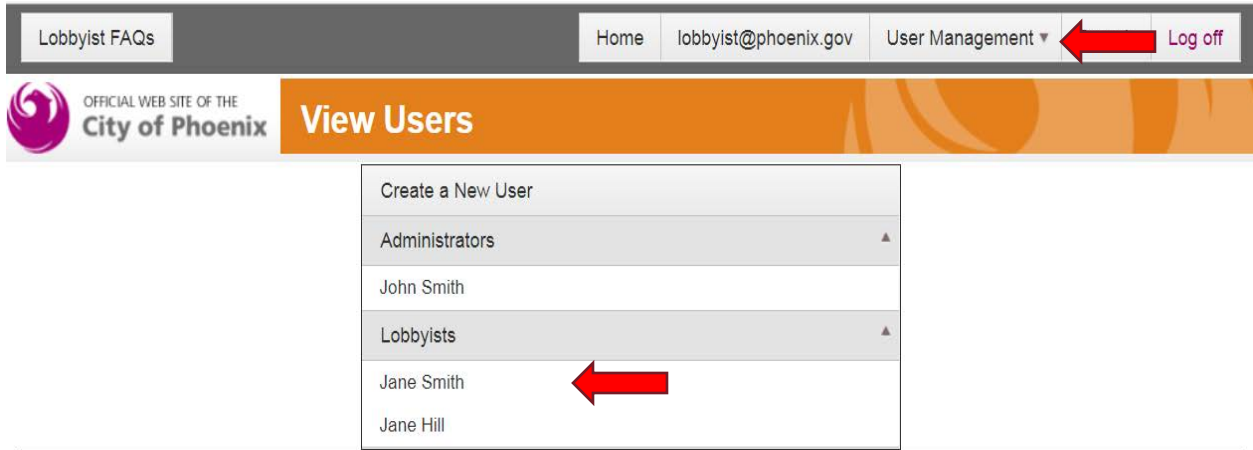
City

State

Zip

## 6.4 CHANGING THE PASSWORD OF A USER (ADMINISTRATOR FUNCTION)

1. When logged in as an administrator of your organization, go to the “User Management” page.
2. Click the name of the user whose password you want to change.



Lobbyist FAQs Home lobbyist@phoenix.gov User Management Log off

OFFICIAL WEB SITE OF THE City of Phoenix

### View Users

- Create a New User
- Administrators
  - John Smith
- Lobbyists
  - Jane Smith
  - Jane Hill

3. Click the “Edit Information” button.



OFFICIAL WEB SITE OF THE City of Phoenix

### Manage Account

**Personal Information**

First Name Jane  
Last Name Smith  
Telephone (602) 123-4567  
Email jane@123.com  
Activated No

**Organization Information**

Organization Name 123, Inc.  
Address 200 W Washington St  
City Phoenix  
State AZ  
Zip 85003

|  |  |

4. Enter and confirm the new password and hit the “Change” button under the “Set Password” section.



**Set Password**

New Password

Confirm New Password

## 6.5 DELETING USERS (ADMINISTRATOR FUNCTION)

1. When logged in as an administrator of your organization, go to the “User Management” page.
2. Click the name of the user you want to delete.

OFFICIAL WEB SITE OF THE  
**City of Phoenix**

**View Users**

- Create a New User
- Administrators ▲
  - John Smith
- Lobbyists ▲
  - Jane Smith
  - Jane Hill

3. Click the “Delete User” button.

OFFICIAL WEB SITE OF THE  
**City of Phoenix**

**Manage Account**

**Personal Information**

First Name Jane  
Last Name Hill  
Telephone (602) 123-4568  
Email oml@phoenix.gov  
Activated Yes

**Organization Information**

Organization Name 123, Inc.  
Address 200 W Washington St  
City Phoenix  
State AZ  
Zip 85003

Edit Information | Delete User | Change Roles | Back to List

4. On the confirmation page, click the “Delete” button.

OFFICIAL WEB SITE OF THE  
**City of Phoenix**

**Delete User**

Are you sure you want to delete this user?

**Account**

User Name oml@phoenix.gov  
Role Lobbyist

**Personal Information**

Name Jane Hill  
Phone (602) 123-4568  
Email oml@phoenix.gov

**Organization Information**

Organization Name 123, Inc.  
Address 200 W Washington St  
Phoenix, AZ, 85003

Delete | Back to User | Back to List

Note: Deleting a user does not delete a registered lobbyist from your registration; it simply removes them as an authorized user from the system so they cannot file reports.





Lobbyist Registration and Reporting Database User Guide | 12.2017

