SOUTH CAROLINA

State Ethics Commission

Lobbyist's Principal Disclosure Filing User Guide





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LOGIN TO YOUR ACCOUNT

To login to your account go to https://ssl.sc.gov/EthicsRegistration/Login/Login.aspx

You must have already created an account and have an online registration filed in order to file an electronic disclosure statement.

If you have already created a user account, enter your username and password and click "Login".

CHANGE YOUR PASSWORD

Click on the "Forgot your password?" link:



Enter the username you selected to register for your account in the space provided and click "Next".

Electronic Filing
Electronic Filing Password Retrieval
To reset your account password, please enter your Username below and press the "Next" button. Instructions will be emailed to the registered account on file. If you cannot recall your username, password or email address used to register your account please contact the State Ethics Commission , unless you are a House Representative or member of a House Legislative Caucus, then contact the House Ethics Committee or if you are a Senator or member of a Senate Legislative Caucus, then contact the Senate Ethics Committee.
Username:
Novt -

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 2 of 51 A password reset link will be sent to the email address you used to create your account.

Home > Electronic Filing

Electronic Filing

Password Retrieval

Thank you, an email has been sent to the registered email account on file. Please check your email and follow the instructions to reset your password. Be sure to check "Junk" or "Spam" folders if you do not receive the email.

A Password Reset link will be contained in the email message sent to you:

SC.GOV has received a request to reset your Public Disclosure and Accountability Reporting System user account password. If you did not make this request, please contact SC.GOV at 866.340.7105 ext 102 to report possible account misuse. To complete the password reset process, please click on the link to display the password reset page. This password reset link is only valid for one time. Password reset

TROUBLE WITH LOGIN

When attempting to login, you may not be able to recall your username, password or the email address you used when registering for your account.

If you do not know your username, click on the "Forgot your username?" link:

Accountability Reporting

Electronic Filing

Welcome to the South Carolina State Ethics Commission Public Disclosure and Accountability Reporting System.

If you are not currently enrolled with our online service, you'll need to <u>create a user account</u>. You only need to do this once. Please do not signup multiple times.

The public will have access to these reports through the Public Disclosure and Accountability Reporting System.



Enter the email address you used to register for your account in the space provided and click "Next".

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Electronic Filing Username Retrieval Please enter your email address below and press the "Next" button. Username(s) associated with the email address will be emailed to you. If you cannot recall your username, password or email address used to register your account please contact the State Ethics Commission, unless you are a House Representative or member of a House Legislative Caucus, then contact the House Ethics Committee or if you are a Senator or member of a Senate Legislative Caucus, then contact the Senate Ethics Committee. Email Address: Next →

Username(s) associated with the email address will be emailed to you. Be sure to check your 'Junk Mail' or 'Spam' mail folders.

Electronic Filing

Username Retrieval

Thank you, an email that contains all username(s) associated with this email address has been sent. Be sure to check "Junk" or "Spam" folders if you do not receive the email.

The email message will appear as shown:

SC.GOV has received a request to send Public Disclosure and Accountability Reporting System username(s). If you did not make this request, please contact SC.GOV at 866.340.7105 ext 102 to report possible account misuse. The following username(s) are associated with the email address.

username (1): jackson1997

If you do not know your password, click on the "Forgot your password?" link:

Electronic Filing
Accountability Reporting Electronic Filing
Welcome to the South Carolina State Ethics Commission Public Disclosure and Accountability Reporting System.
If you are not currently enrolled with our online service, you'll need to $\underline{\text{create a user account}}$. You only need to do this once. Please do not signup multiple times.
$\label{thm:public will have access to these reports through the \underline{\textit{Public Disclosure and Accountability Reporting System}}.$
—Login————————————————————————————————————
Username Forgot your username?
Password Forgot your password?
Login

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 4 of 51 Enter the username you selected to register for your account in the space provided and click "Next".



A password reset link will be sent to the email address you used to create your account.

Electronic Filing Password Retrieval Thank you, an email has been sent to the registered email account on file. Please check your email and follow the instructions to reset your password. Be sure to check "Junk" or "Spam" folders if you do not receive the email.

A Password Reset link will be contained in the email message sent to you:

SC.GOV has received a request to reset your Public Disclosure and Accountability Reporting System user account password. If you did not make this request, please contact SC.GOV at 866.340.7105 ext 102 to report possible account misuse. To complete the password reset process, please click on the link to display the password reset page. This password reset link is only valid for one time. Password reset

If you do not know **your username**, **password or email address** used to register your account please contact the State Ethics Commission at (803) 253-4192,

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SUCCESSFUL LOGIN

Once you have successfully logged in, you will be able to do the following using the "My Account" features:

Lobbyist's Principals and State Agency Lobbyist's Principals

- View all Reports- Registrations and Disclosure Statements
- File a new Registration
- Edit a saved Registration
- Amend a Registration
- Terminate a Lobbyist Relationship
- File a new Disclosure Statement
- Edit a saved Disclosure Statement
- Amend a Disclosure Statement
- Update profile

This user guide contains information for electronically filing Lobbyist's Principal Disclosure Statements.

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LOBBYIST'S PRINCIPAL ACCOUNTS

NAVIGATION

Once you have logged in to your account, you are able to navigate through the various sections of the South Carolina State Ethics Commission Public Disclosure and Accountability Reporting System by using the menu on the left of each page. The picture shown below is an example of the left menu.



Public Disclosure - this link provides online access to all Campaign Disclosure reports, Operating Disclosure reports, Statements of Economic Interest and Statements of Organization that have been filed electronically.

Electronic Filing - this will link to the Login Page for Electronic Filing of Registrations and Disclosure Reports.

Disclosure Filing - provides a menu of your filed and unfiled disclosure reports.

Principal Profile - here you can change your contact information.

Registrations - provides a menu of your filed and unfiled registrations.

Help with Filing - this link will provide access to a glossary of terms and the user guides for filing reports online.

SC State Ethics Commission - direct link to the SC State Ethics Commission website.

Contact Us - provides information on how to contact the SC State Ethics Commission and who to contact for questions regarding specific topics.

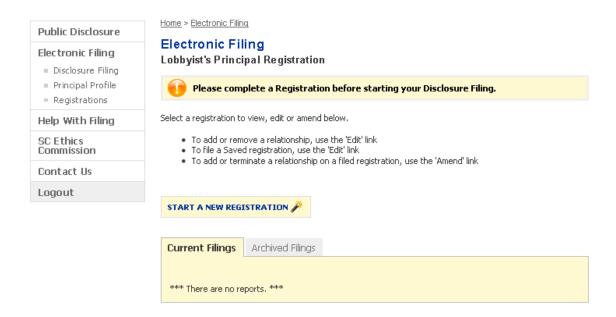
Logout - this will end your session and close your account.

MY ACCOUNT

Once you have logged into your account successfully, you will be able to do the following:

- View all Reports- Registrations and Disclosure Statements
- File a new Registration
- Edit a saved Registration
- Amend a Registration
- Terminate a Lobbyist Relationship
- File a new Disclosure Statement
- Edit a saved Disclosure Statement
- Amend a Disclosure Statement
- Update profile

When you login for the first time, your screen will appear as shown:

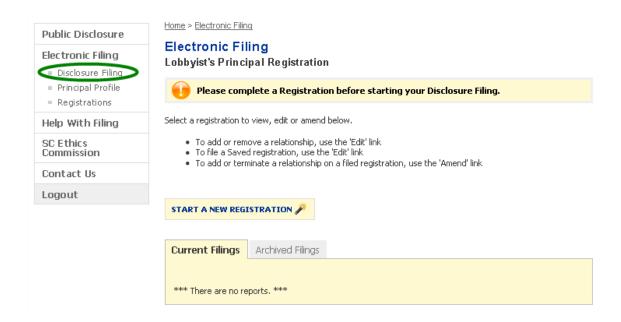


Current Filings: This folder contains the most current filed version of your Registrations or Disclosure Statements and any "Saved" version of reports. "Saved" reports are originals or amendments that are in edit mode and have not yet been filed.

Archived Filings: This folder contains the outdated versions of all reports that have a more recent version located in the Current Filings folder. These reports can no longer be modified.

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 8 of 51 Use the left menu to navigate between report types. To view, edit a saved report, or amend a filed one, click the View, Edit or Amend link for the report you wish to work with.

To work with your Disclosure Statements, click "Disclosure Filing" on the left menu.



You will be able to Start a New Disclosure Filing, Edit or Amend a Disclosure Filing or Delete a Disclosure Filing by selecting from the available options for each report.

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My Account: Disclosure Filing

Directions

Use the left menu to navigate between report types. To review information you have entered, click each tab below. To work with or view a report, click on one of the links to the right of the report.

Working with Reports

You may only have one Original version of a "Saved" report at a time. To begin a new report, first complete and file your Original "saved" report.

Click the 'Amend' link for the report you need to amend, make necessary changes and file the report again.



To delete a report, see the section titled Deleting a Report in this user guide.

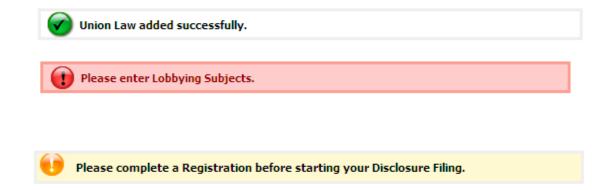
STATUS NOTIFICATIONS

Throughout the application you will receive messages at the top of your screen. These messages will appear when:

- you complete a step successfully
- you miskey information or leave a required item empty
- you enter information that may not be valid or acceptable

The error messages will help direct you to correct your mistake. The warning messages will ask you to verify the information you have entered and allow you to modify the information if necessary.

SC.GOV Version 1.01.01 Examples are shown below:



SESSION EXPIRED

Your session will expire after 30 minutes of inactivity. When your session expires, the system automatically logs you out of your session. To login to your account, you can use the link provided in the center of the page or click on 'Electronic Filing' from the menu on the left.



START A NEW LOBBYIST'S PRINCIPAL DISCLOSURE FILING

To start a new filing, click the "Start a New Disclosure Filing" button.

NOTE: You will only be able to file your disclosure statement electronically if you have registered electronically. If you registered using the paper forms, contact the State Ethics Commission at 803-253-4192 for your account username and instructions on how to obtain and change your password.

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My Account: Disclosure Filing

Directions

Use the left menu to navigate between report types. To review information you have entered, click each tab below. To work with or view a report, click on one of the links to the right of the report.

Working with Reports

You may only have one Original version of a "Saved" report at a time. To begin a new report, first complete and file your Original "saved" report.

Click the 'Amend' link for the report you need to amend, make necessary changes and file the report again



Select the calendar year and Report Period for your disclosure filing and click Next.



You will not be able to start an electronic disclosure report until you have registered electronically for that calendar year and the lobbyists you have registered have completed an electronic registration.

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LOBBYIST PAYMENTS

- Step 1 Select the Lobbyist for which you would like to enter a payment. All lobbyist relationships that have been established by electronic registration will appear in the list.
- **Step 2** Select the Payment Status.
- **Step 3** Enter the month, day and year of the payment date.
- **Step 4** Enter the amount of the payment.

Option: If you do not have any lobbyist payments to enter at this time, mark the

checkbox next to 'Skip for Now' and click Save to move on to the next

section.

Step 5 – Click Save.

Harna y Flactronia Filina

After you click 'Save' you will see a message that the information you entered for that section was saved successfully.

heckbox below.	ields marked by an asterisk (*) are required. To skip this section, use the
Payment to Lobbyist	
*Lobbyist Name	C Jackson, Michelle
	C Long, Sr. Larry A
*Payment Status	C Paid
	C To Be Paid
*Payment Date	
*Amount \$	

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 13 of 51 **Step 6** – You may continue to the next section or review or edit the information you have already entered. Select how you would like to continue and click Continue.



EXPENDITURES

You may begin entering expenditures you have paid out by following the steps outlined below:

Step 1 - Select if you have entered this vendor before.

Home > Electronic Filing	
Electronic Filing Lobbyist's Principal Disclose	ure: Itemized Expenditures
Please complete the form below.Field checkbox below.	ds marked by an asterisk (*) are required. To skip this section, use the
— Itemized Expenditure: Ve	ndor
* Have you entered this vendor before?	C Yes ←
	C No
	C Not Sure
Optional SKIP FOR N	OW ← Back Continue

Option: If you do not have any expenditures to enter at this time, mark the checkbox next to 'Skip for Now' to move on to the next section.

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 14 of 51 **Step 2 -** Click Continue when you are finished making your selections.

A. If you selected **No**, then complete the information on the page. Fields marked with an asterisk (*) are required.

Step 1 - Enter the vendor's name, address, city, state, and zip code.

Please complete the form below. Fields marked with an asterisk (*) are required.

- **Step 2 -** Enter the date the expenditure was paid, the amount of the expenditure, and the purpose of the expenditure.
- **Step 3** Click Save to save this expenditure.

*Vendor Name	
*Mailing Address	
*City	
*State	▼
*Zip Code	
*Date	
Expenditure *Date	
*Purpose	C. Constinu
	O Supplies
	C Rent
	O Utilities
	C Compensation of Support Personnel
	O Other

B. If you selected **Yes or Not Sure**, then

Step 1 - Enter the vendor name or as many letters as you can recall and click 'Search'. If you have not entered this vendor before, click 'Back' and select 'No' from the previous screen.

— Search	Your Existing Vendors		
Enter at lea	ast two (2) letters of the vendor name t	to locate an existing vendor.	
	Vendor Name	Search	
			← Back

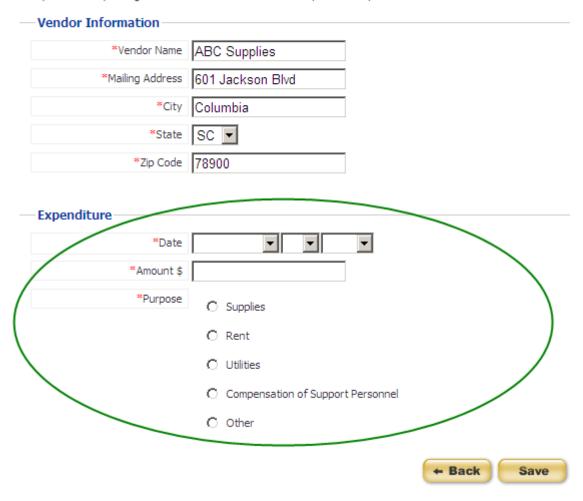
Your search will return a list of matching vendors that you have already entered.



- Step 2 Select the vendor you have paid by clicking on the vendor name. If you do not see the vendor on this list, update your search criteria and search again or click 'Back' to add a new vendor. If there are no results, click on the link that will be provided to add a new vendor.
- Step 3 Once you have selected your vendor, the vendor information will be completed for you so that you do not have to enter this information repeatedly. Verify the vendor information is correct and make any changes necessary. Any changes you make will apply to all expenditures entered for this vendor.

SC.GOV Version 1.01.01 Please complete the form below. Fields marked with an asterisk (*) are required.

If you make any changes to the vendor information it will update all expenditures associated with this vendor.

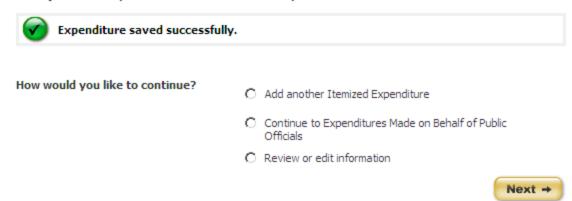


- **Step 4 -** Enter the date the expenditure was paid, the amount of the expenditure, and the purpose of the expenditure.
- **Step 5 -** Click 'Save' to save this expenditure.

For every expenditure, after you click 'Save' you will see a message that the expenditure was saved successfully. To continue, select add another expenditure, continue to the next section or review or edit the information you have already entered and click 'Next'.

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Lobbyist's Principal Disclosure: Itemized Expenditures



If you selected add another expenditure, you will be taken back to the screen shown first in this section. You may enter all of your expenditures at once or come back to add more later.

EXPENDITURES ON BEHALF OF PUBLIC OFFICIALS

Step 1 – Enter the name of the public official.

Step 2 - Enter the date the expenditure was paid, the amount of the expenditure,

and the description of the expenditure.

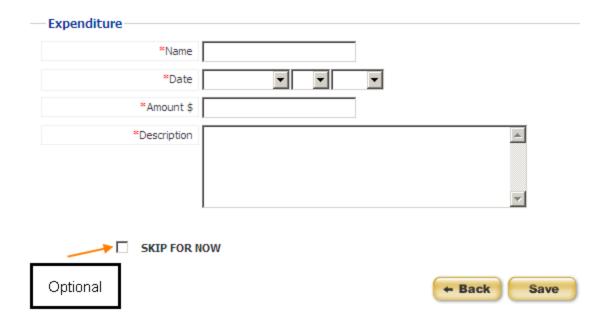
Option: If you do not have any expenditures to enter at this time, mark the

checkbox next to 'Skip for Now' to move on to the next section.

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Lobbyist's Principal Disclosure: Expenditures Made on Behalf of Public Officials

Please complete the form below. Fields marked by an asterisk (*) are required. To skip this section, use the checkbox below.



Step 3 - Click 'Save' to save this expenditure.

Electronic Filing Lobbyist's Principal Disclosure: Expenditures Made on Behalf of Public Officials Expenditure saved successfully. How would you like to continue? Add another Expenditure Made on Behalf of Public Official Continue to Expenditures Made on Behalf of Member of Judiciary Review or edit information

For every expenditure, after you click 'Save' you will see a message that the expenditure was saved successfully. To continue, select add another expenditure on behalf of public official, continue to the next section or review or edit the information you have already entered and click Continue.

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EXPENDITURES ON BEHALF OF JUDICIARY MEMBERS

Step 1 – Enter the name of the member of the judiciary.

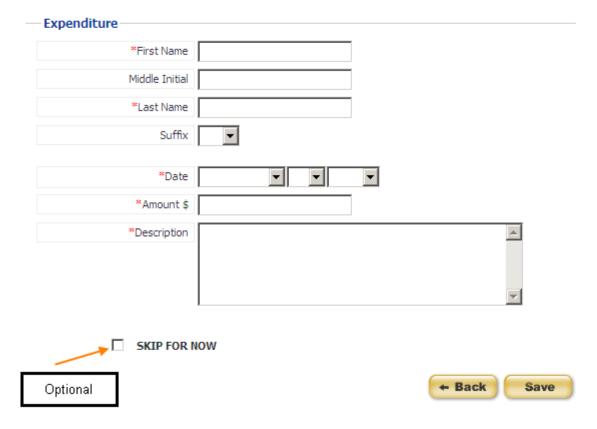
Step 2 - Enter the date the expenditure was paid, the amount of the expenditure,

and the description of the expenditure.

Option: If you do not have any contributions to enter at this time, mark the

checkbox next to 'Skip for Now' to move on to the next section.

Please complete the form below. Fields marked with an asterisk (*) are required. To skip this section, use the checkbox below.



Step 3 - Click 'Save' to save this expenditure.

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Lobbyist's Principal Disclosure: Expenditures Made on Behalf of Members of Judiciary

Expenditure saved successfully.		
How would you like to continue?	0	Add another Expenditure Made on Behalf of Member of Judiciary
	0	Continue to Speaking Engagements
	0	Review or edit information
		Continue

For every expenditure, after you click 'Save' you will see a message that the expenditure was saved successfully. To continue, select add another expenditure on behalf of a judiciary member, continue to the next section or review or edit the information you have already entered and click Continue.

SPEAKING ENGAGEMENTS

- **Step 1** Enter the name of the recipient of the speaking engagement.
- Step 2 -Enter the address, city, state and zip code of the location of the speaking engagement
- Enter the date of the speaking engagement, the amount for the engagement Step 3 and the description of the event.
- Option: If you do not have any contributions to enter at this time, mark the checkbox next to 'Skip for Now' to move on to the next section.

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Lobbyist's Principal Disclosure: Speaking Engagements

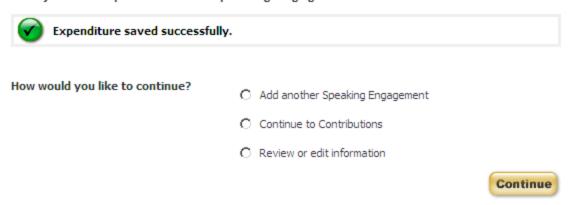
Please complete the form below. Fields marked with an asterisk (*) are required. To skip this section, use the checkbox below.

—Speaking Engagement: R	ecipient-			
*First Name				
Middle Initial				
*Last Name				
Suffix	•			
*Mailing Address				
*City				
*State	▼			
*Zip Code				
*Date		<u> </u>	_	
*Amount \$				
*Event				_
				▽
SKIP FOR N	OW			
Optional				← Back Save

Step 4 - Click 'Save' to save this speaking engagement.

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Lobbyist's Principal Disclosure: Speaking Engagements



For every engagement, after you click 'Save' you will see a message that the speaking engagement was saved successfully. To continue, select add another speaking engagement, continue to the next section or review or edit the information you have already entered and click Continue.

CONTRIBUTIONS

Optional

Step 1 - Select if you have entered this public official or candidate before.

Electronic Filing Lobbyist's Principal Disclosure: Contributions Please make a selection below to continue. To skip this section, use the checkbox below. Lobbyist's Principals cannot contribute more than \$3500.00 to one candidate for constitutional office and cannot contribute more than \$1000.00 to one candidate for local office. Contributions to Public Officials or Candidates Have you entered this Public Officials or Candidates C Yes No No Not Sure

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 23 of 51 Option: If you do not have any contributions to enter at this time, mark the checkbox next to 'Skip for Now' to move on to the next section.

Step 2 - Click Continue when you are finished making your selections.

A. If you selected **No**, then complete the information on the page. Fields marked with an asterisk (*) are required.

- **Step 1 -** Enter the public official or candidate's name, address, city, state, and zip code.
- **Step 2 -** Enter the date the contribution was made and the amount of the contribution.
- **Step 3** Click Save to save this contribution.

Electronic Filing

Lobbyist's Principal Disclosure: Contributions

Please complete the form below. Fields marked with an asterisk (*) are required.

—Public Official or Candidat	te Information————		
*First Name			
Middle Initial			
*Last Name			
Suffix	•		
*Mailing Address		1	
*City			
*State	▼		
*Zip Code			
- Contribution			
*Date	V	▼	
*Amount \$			
			← Back Save

B. If you selected **Yes or Not Sure**, then

Electronic Filing

Step 1 - Enter the public official or candidate name or as many letters as you can recall and click 'Search'. If you have not entered this public official or candidate before, click 'Back' and select 'No' from the previous screen.

Lobbyist's Principal Disclosure: Contributions Search Your Existing Public Officials/Candidates To locate an existing Public Official or Candidate, search below. Last Name Search ← Back Your search will return a list of matching recipients that you have already entered. Electronic Filing Lobbyist's Principal Disclosure: Contributions Search Your Existing Public Officials/Candidates

To locate an existing Public Official or Candidate, search below. Last Name | Ha Search Search Results Select an existing Public Official or Candidate, search again, or use the 'Back' button to add a new Public Official or Candidate. Halloway, Lucas - 678 Main Street ← Back

Step 2 - Select the person to whom you have made a contribution by clicking on the recipient name. If you do not see the recipient on this list, update your search criteria and search again or click 'Back' to add a new recipient. If there are no results, click on the link that will be provided to add a new public official or candidate.

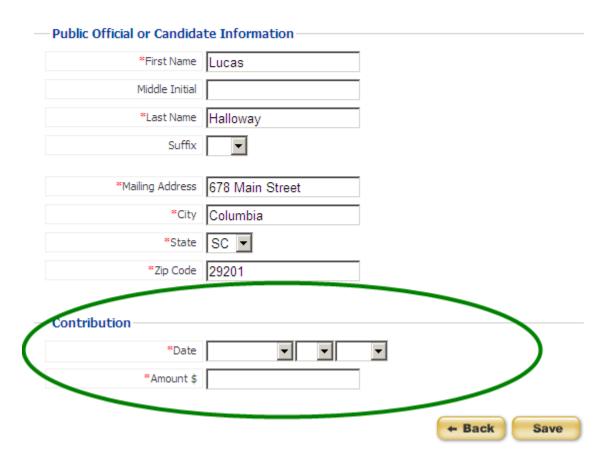
SC.GOV Version 1.01.01 **Step 3 -** Once you have selected your public official or candidate, the public official or candidate information will be completed for you so that you do not have to enter this information repeatedly. Verify the public official or candidate information is correct and make any changes necessary. Any changes you make will apply to all contributions entered for this public official or candidate.

Electronic Filing

Lobbyist's Principal Disclosure: Contributions

Please complete the form below. Fields marked with an asterisk (*) are required.

If you make any changes to the contributor information it will update all contributions associated with this contributor.



- **Step 4 -** Enter the date the contribution was made and the amount of the contribution.
- **Step 5 -** Click 'Save' to save this contribution.

For every contribution, after you click 'Save' you will see a message that the contribution was saved successfully. To continue, select add another contribution, continue to the next section or review or edit the information you have already entered and click 'Next'.

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Optional

Lobbyist's Principal Disclosure: Contributions

Contribution saved successfully.		
		Add another Contribution
	0	Continue to Voluntary Membership Organization
	0	Review or edit information
		Continue

If you selected add another contribution, you will be taken back to the screen shown first in this section. You may enter all of your contributions at once or come back to add more later.

CONTRIBUTIONS TO VOLUNTARY MEMBERSHIP ORGANIZATIONS

Step 1 - Select if you have entered this voluntary membership organization before.

Electronic Filing Lobbyist's Principal Disclosure: Voluntary Membership Organizations Please make a selection below to continue. To skip this section, use the checkbox below. Please Note: Information must be provided concerning any member if that member contributed more than \$500 and more than 20% of the total contributions received by that organization during the calendar year. Voluntary Membership Organizations Have you entered this Organization before? O No No No SKIP FOR NOW

Option: If you do not have any organizations to enter at this time, mark the checkbox next to 'Skip for Now' to move on to the next section.

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← Back

Next →

Step 2 - Click Continue when you are finished making your selections.

A. If you selected **No**, then complete the information on the page. Fields marked with an asterisk (*) are required.

- **Step 1** Enter the organization's name, address, city, state, and zip code.
- **Step 2 -** Enter the date the contribution was made and the amount of the contribution.
- **Step 3** Click Save to save this contribution.

	Electronic Filing Lobbyist's Principal Disclosure: Voluntary Membership Organizations									
Ple	Please complete the form below. Fields marked with an asterisk (*) are required.									
_	-Voluntary Membership O	rganization	Infor	mation –						
	*Organization Name									
	*Mailing Address									
	*City									
	*State	•								
	*Zip Code									
	Contribution									
	Contribution									
	*Date		▼	▼	▼					
	*Amount \$									
						← Back	Save			

B. If you selected **Yes or Not Sure**, then

Step 1 - Enter the organization name or as many letters as you can recall and click 'Search'. If you have not entered this organization before, click 'Back' and select 'No' from the previous screen.

Lobbyist's Principal Disclosure: Voluntary Membership Organization Search Your Voluntary Membership Organizations To locate an existing organization, search below. Organization Name Search Fearch

Your search will return a list of matching organizations that you have already entered.

Electronic Filing

Electronic Filing

Lobbyist's Principal Disclosure: Voluntary Membership Organization

Search Your Voluntary M To locate an existing organization		;
Organization Name	MA	Search
Search Results Select an existing Organization, s • MADD - 789 Madd Lane	search again, or use the 'Back' b	outton to add a new Organization.

Step 2 - Select the organization to which you have made a contribution by clicking on the organization name. If you do not see the organization on this list, update your search criteria and search again or click 'Back' to add a new organization. If there are no results, click on the link that will be provided to add a new organization.

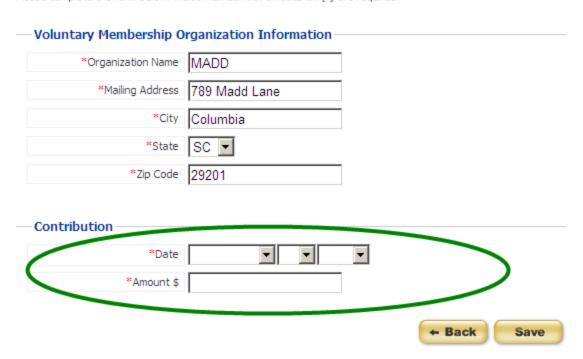
SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 29 of 51 **Step 3 -** Once you have selected your organization, the organization information will be completed for you so that you do not have to enter this information repeatedly. Verify the organization information is correct and make any changes necessary. Any changes you make will apply to all contributions entered for this organization.

Electronic Filing

Lobbyist's Principal Disclosure: Voluntary Membership Organizations

If you make any changes to the organization information it will update all contributions associated with this organization.

Please complete the form below. Fields marked with an asterisk (*) are required.



- **Step 4 -** Enter the date the contribution was made and the amount of the contribution.
- **Step 5** Click 'Save' to save this contribution.

For every organization, after you click 'Save' you will see a message that the organization was saved successfully. To continue, select add another organization, continue to the next section or review or edit the information you have already entered and click 'Next'.

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Lobbyist's Principal Disclosure: Voluntary Membership Organizations

Voluntary Membership Organization saved successfully.			
How would you like to continue?	Add another Organization		
	C Continue to Direct Business Relationship		
	C Review or edit information		
		Continue	

If you selected add another organization, you will be taken back to the screen shown first in this section. You may enter all of your contributions to voluntary membership organizations at once or come back to add more later.

DIRECT BUSINESS RELATIONSHIPS

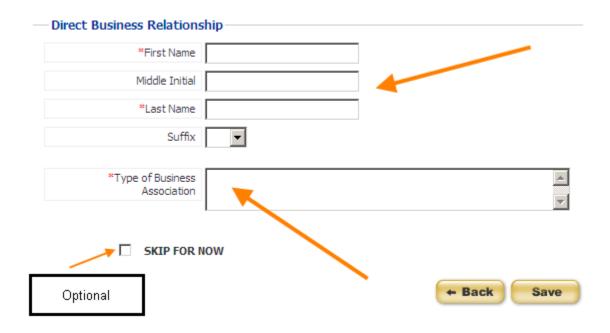
For the purposes of this item, direct business association **does not** include:

- (a) ownership interests held by a lobbyist or a lobbyist's principal and a member of the General Assembly, the Governor, the Lieutenant Governor, any other statewide constitutional officer, any public official of any state agency who engaged in covered agency actions, or any of their employees in the same corporation or partnership unless the interest of each exceeds five percent of the total shares outstanding or partnership interests in the entity;
- (b) an interest held by a member of the General Assembly, the Governor, the Lieutenant Governor, any other statewide constitutional officer, any public official of any state agency who engaged in covered agency actions, or any of their employees in a partnership or corporation represented by a lobbyist or a lobbyist's principal if the interest is less than five percent of the total shares outstanding or partnership interests in such entity; or
- (c) any commercial transaction between a lobbyist or lobbyist's principal and a member of the General Assembly, the Governor, the Lieutenant Governor, any other statewide constitutional officer, any public official of any state agency who engaged in covered agency actions, or any of their employees in which the fair market value of the goods transferred or services rendered is paid;

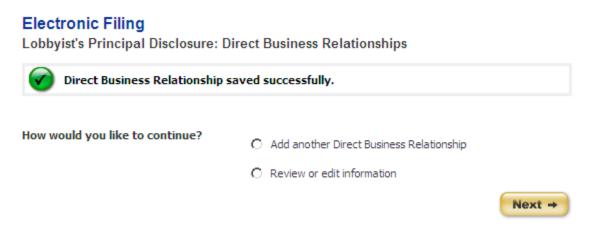
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- **Step 1** Enter the name of the direct business relationship.
- **Step 2 -** Enter the type of business association.

Option: If you do not have any business relationships to enter at this time, mark the checkbox next to 'Skip for Now' to move on to the next section.



Step 3 - Click 'Save' to save this business relationship.



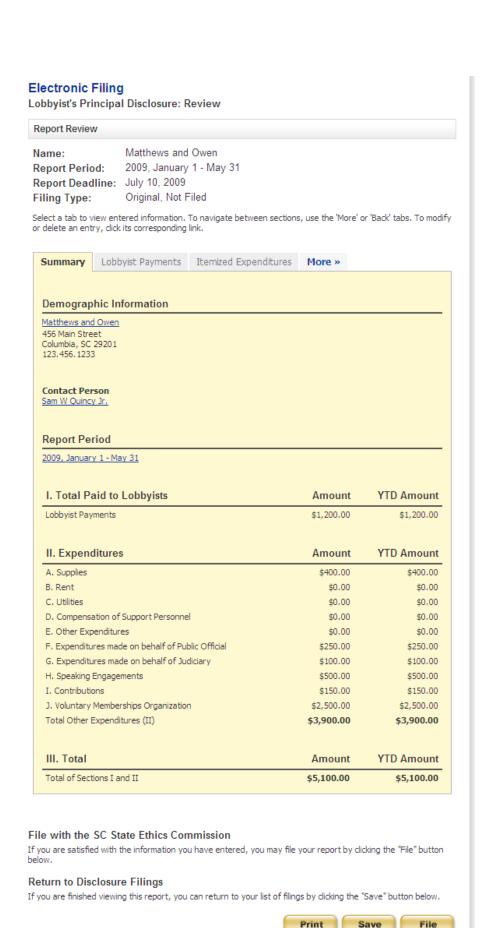
For every entry, after you click 'Save' you will see a message that the entry was saved successfully. To continue, select add another direct business relationship or review or edit the information in this section and click Next.

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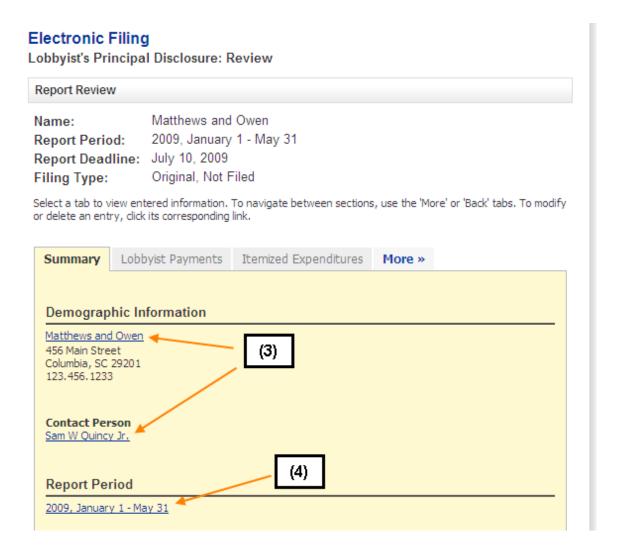
REVIEW YOUR REPORT

GENERAL INFORMATION

- (1) After each section of the Lobbyist's Principal Disclosure form you have the option to "Review or edit information". If you select this item you will be taken to the review tab of that section.
- (2) If you choose to Edit your Saved report, you will start your report review on the summary page. The heading displays your name, report period, report deadline and report version that you are working in. The Summary tab displays your demographic information, report period and expenditures summary.



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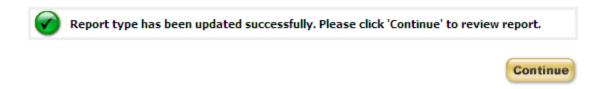


- (3) You can edit your demographic information by clicking the principal name or contact name. Refer to the section Updating your Profile in this User Guide to see how your changes may affect other reports.
- (4) You can edit your report period by clicking on the report period link.



Modify your report period as necessary and click 'Save' to continue. If you do not want to modify your report period, click Back.

If you change your report type, you will receive a message that the report type has been updated successfully. Click 'Continue' to move on.



- (6) Once you are in the report review, you can navigate between sections of the Lobbyist's Principal Disclosure using the tabs. The Payments to Lobbyists are displayed in the Lobbyist Payments tab. All of the itemized expenditures you have entered this period are displayed in the Itemized Expenditures tab. Each of the entries are displayed in their respective tabs labeled for each section.
- (7) You can add, edit and delete items in each section.
- (8) If you have not entered any items in a section, the tab will be empty. The tab will contain a link for you to add an item to that section.



(9) If at any time you are done working with your report and want to return to your account page, you can click Save at the bottom of each of the review tab pages or click Disclosure Filings from the menu on the left.



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ADD ANOTHER ENTRY

To add another expenditure or direct business relationship, click on the 'Add a 'Section Name'" link on the on the section tab.



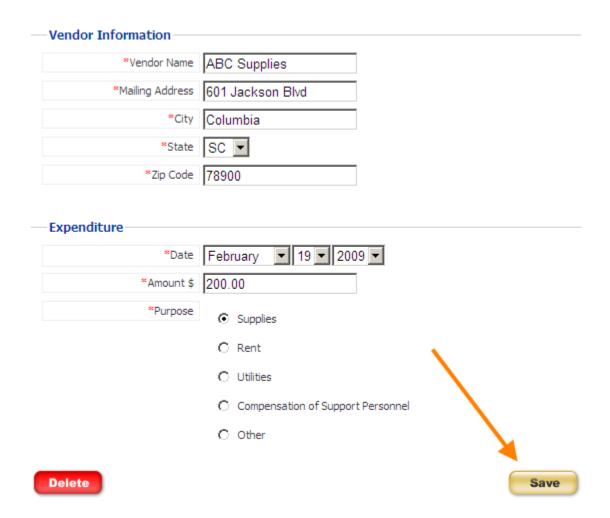
Follow the steps previously outlined in this user guide to enter the information required for this section.

When you have successfully added the item, you will see a successful message. Make a selection and click 'Next' to continue.

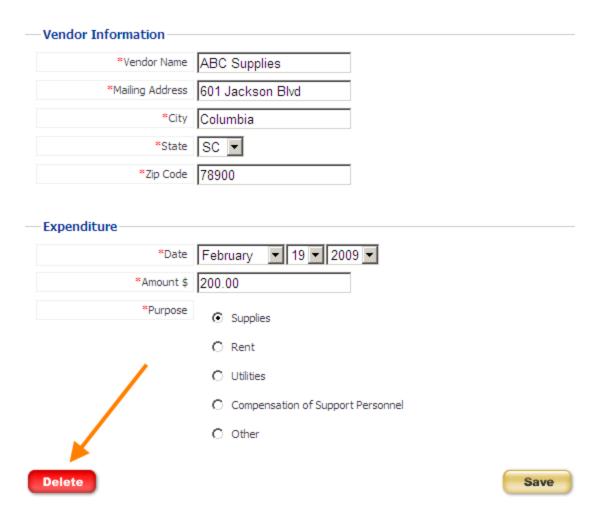
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EDIT OR DELETE AN ENTRY

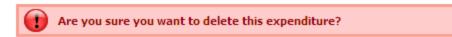
- (1) To edit or delete an entry, navigate to the section tab. Click on the link within the entry you wish to edit or delete. This link will be the date or name.
- (2) Once you have modified the information necessary, click 'Save' to update this entry.



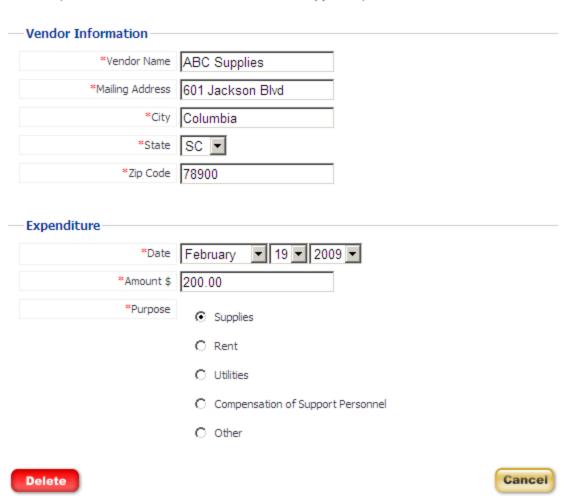
- (3) You will see a message indicating that your entry has been updated successfully. Click 'Continue' to return to the review section of your report.
- (4) To delete the entry, click 'Delete'.



(5) You will be asked to confirm that you really want to delete this contribution. Click 'Delete' on this page to delete the entry or 'Cancel' to return to the review section of your report.



Please complete the form below. Fields marked with an asterisk (*) are required.



(6) If you have chosen to delete the item, you will see a message that the item has been deleted successfully. Click 'Continue' to return to the review section of your report.



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RETURNING TO YOUR SAVED REPORT

To work with or view a report, click one of the links to the right of the report.



When you select to edit your report you will be returned to the report review screen where you can perform the operations previously mentioned.

FILING YOUR REPORT

Step 1 - When you are ready to file your report, click 'File' from within your report.



Step 2 - Confirm you wish to file your disclosure statement and click File.

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Electronic Filing

Lobbyist's Principal Disclosure: Filing Confirmation

Once your report is filed, the information you have submitted will be publicly accessible. If you need to change any information, you must file an amended report.

CERTIFICATION: I certify that the contents of this statement are true, correct, and complete to the best of my knowledge and belief. I understand that if this statement is not received within ten (10) days of the deadline, a late filing penalty of \$100.00 will be levied.

Are you sure you want to file now?



Step 3 – Filing Complete. You will receive a confirmation number for your filed disclosure statement.

Electronic Filing

Lobbyist Principal Disclosure: Filing confirmation



Your report has been filed successfully on 5/7/2009 3:03:59 PM. Your confirmation number is LPDF11-R16-6e29b245.

Your confirmation has been sent to the email address on record. Please print this page for your records. Please click 'Continue' to return to your Lobbyist's Principal Filings or logout if you are finished.



To return to your account, click "Continue". Your disclosure statement will now appear as FILED in the Status column.



SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 42 of 51 You will also receive an email confirmation that you have filed your report. The email message will be sent to the address you have on record with your account. It will be similar to:

State Ethics Commission
Public Disclosure and Accountability Reporting

Filing Year 2009
Report Period: January 1 - May 31
Lobbyist's Principal Disclosure Report, Original
You have successfully filed your report as of 5/7/2009 3:03:59 PM. Your confirmation number is LPDF11-R16-6e29b245.
Please print this page for your records.

Some email providers may prevent the confirmation from appearing in your inbox or may not allow you to receive the confirmation at all. Please be sure to check Junk, Spam or Bulk folders. It is known that filing confirmations are not being received by hotmail and @email.com email accounts. It is suggested that you do not register with a hotmail or email.com email account and if you have that you update your email address to a non-hotmail or email.com account.

Once your report is filed, the information you have submitted will be publicly accessible. If you need to change any information, you must file an amended report.

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AMENDING A REPORT

In order to make a change to a report that has already been filed, you must file an amendment. To file an amendment, go to your Disclosure Filing Account page and click 'Amend' next to the report that you wish to amend.



To modify the information contained in the report, please refer to the Review your Report section.

If you do not wish to file at this time, click "Save" and you will return to the My Account section for your disclosure filings.

If you are ready to file the changes you have made, click on the "File" button on the bottom right of your screen.

DELETING A REPORT

Step 1 - You may delete a report that has not been filed. To delete a report, go to your Disclosure Filings account page and click 'Delete' next to the report that you wish to delete.

Current Filings Archived Filings					
Date Filed	Filing Type	Report Period	View	Edit/Amend	Delete
07/11/2008	Filed	2008, January 1 - May 31	Original	<u>Amend</u>	
02/11/2009	Filed	2008, June 1 - December 31	Original	<u>Amend</u>	
Not Filed	<i>❷ Saved</i>	2009, January 1 - May 31	Original	<u>Edit</u>	<u>Delete</u>

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 44 of 51 **Step 2** - You will be asked if you are sure you want to the delete the report. Click 'Delete' to delete the report or 'Cancel' to keep the report and return to your account page.



Step 3 - If you choose to delete the report, you will see a confirmation message that the report was deleted successfully. Click 'Continue' to return to your account page.



PRINTING A REPORT

You can print a filed or unfiled copy of your report at any time. To print your report, click 'Print' at the bottom page.

File with the SC State Ethics Commission

If you are satisfied with the information you have entered, you may file your report by clicking the "File" button below.

Return to Disclosure Filings

If you are finished viewing this report, you can return to your list of filings by clicking the "Save" button below.



The report will be shown in a print layout. Click 'Print' to print your report. Click 'Back' if you do not want to print your report and return to the report review.

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Electronic Filing

Lobbyist's Principal Disclosure: Review

Report Review

Name: Matthews and Owen Report Period: 2009, January 1 - May 31

Report Deadline: July 10, 2009
Filing Type: Original, Not Filed

SUMMARY

Demographic Information

Matthews and Owen 456 Main Street Columbia, SC 29201 123.456.1233

Contact Person

Sam W Quincy Jr.

Report Period

2009, January 1 - May 31

I. Total Paid to Lobbyists	Amount	YTD Amount
Lobbvist Payments	\$1,200.00	\$1,200.00

II. Expenditures	Amount	YTD Amount
A. Supplies	\$400.00	\$400.00
B. Rent	\$0.00	\$0.00
C. Utilities	\$0.00	\$0.00
D. Compensation of Support Personnel	\$0.00	\$0.00
E. Other Expenditures	\$0.00	\$0.00
F. Expenditures made on behalf of Public Official	\$250.00	\$250.00
G. Expenditures made on behalf of Judiciary	\$100.00	\$100.00
H. Speaking Engagements	\$0.00	\$0.00
I. Contributions	\$150.00	\$150.00
J. Voluntary Memberships Organization	\$2,500.00	\$2,500.00
Total Other Expenditures (II)	\$3,400.00	\$3,400.00
III. Total	Amount	YTD Amount
Total of Sections I and II	\$4,600,00	\$4,600,00

Lobbyist Payments

Date	Payment Type	Lobbyist Name	Amount
01/23/2009	Paid	Michelle Jackson	\$1,200.00
		Total Payments	\$1,200.00

Itemized Expenditures

Date	Name	Address	Purpose	Amount
03/03/2009	ABC Supplies	610 Main Street Columbia, SC 29201	Supplies	\$400.00
			Total	\$400.00

Expenditures: Public Official

Date	Name	Description	Amount
03/09/2009	George Ellis	Campaign Contribution	\$250.00
		Total	\$250.00

Expenditures: Judiciary

Date	Name	Description	Amount
02/03/2009	Mike Hammond	Raffle Ticket	\$100.00
		Total	\$100.00

*** No Speaking Engagements Reported. ***

Contributions

Date	Public Official	Address		Amount
05/06/2009	Lucas Halloway	678 Main Street Columbia, SC 29201		\$50.00
04/27/2009	Lucas Halloway	678 Main Street Columbia, SC 29201		\$100.00
			Total	\$150.00

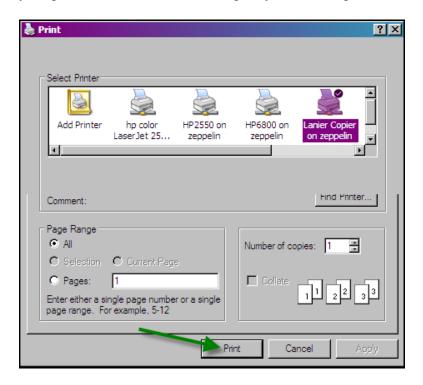
Voluntary Membership Organizations

Date	Organization	Address	Amount
04/29/2009	MADD	789 Madd Lane Columbia, SC 29201	\$1,500.00
02/02/2009	MADD	789 Madd Lane Columbia, SC 29201	\$1,000.00
			Total \$2,500.00

Direct Business Relationships



After you click 'Print' on the print preview, the print set-up window will appear. Select your printer and the number of copies you want to print and click 'Print'.



UPDATING YOUR PROFILE

If you need to update your profile you can do so at any time. You can update your profile by selecting Principal Profile from the menu on the left of the page.



The location of how you enter into your profile will have the following effects on the reports in your account and any reports that you start after you update your profile. You will be able to update your profile from a saved disclosure statement.

For the Master profile

- If the profile is changed from the selecting Profile from the left menu, the profile change applies only to reports started after that change is made.
- No reports in edit or filed mode are updated.

After you have chosen to update your profile and you have modified the information necessary or want your profile to remain as shown without making changes, click 'Save' to update or keep your profile information.

Electronic Filing

My Account: Lobbyist's Principal Profile

Update your profile below and click save to continue. Fields marked by an asterisk (*) are required.

Contact Information *Entity Name	Matthews and Owen
Litaty Name	Iviattriews and Owen
*Mailing Address	456 Main Street
*City	Columbia
*State	SC 🔽
*Zip Code	29201
*Phone Number	123 456 1233
*Email	cblaschek@portal.sc.gov



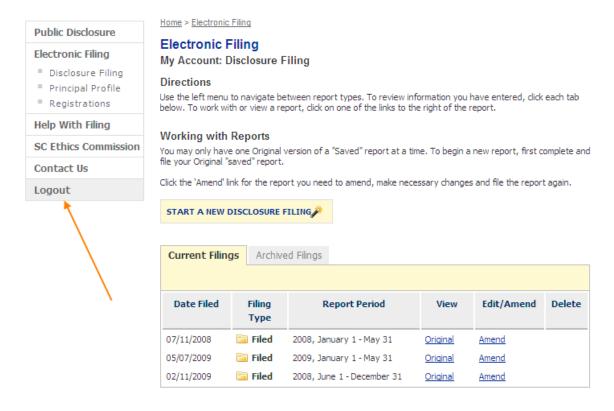
You will receive a message indicating that your profile information has been updated successfully. Click 'Continue' to return to your report if you updated your profile from a

SC.GOV Version 1.01.01 Lobbying Activity – Lobbyist's Principal Disclosure Statement User Guide Page 49 of 51 report or your My Account page if you updated your profile by choosing Profile from the left menu.



LOGOUT

If you are done working with your account and reports, please be sure to logout of the Public Disclosure and Accountability Reporting System by selecting 'Logout' from the menu on the left of the page. This will ensure that you have ended your session.



When you have successfully logged out of the system you will see a message indicating that you have logged out. You can login again using the link on the page or by selecting Electronic Filing from the menu on the left.

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Electronic Filing

Help With Filing

SC Ethics Commission

Contact Us

Logout

Home > Electronic Filing >

Electronic Filing

Lobbyist's Principal: Logged Out

-Logout

You have logged out successfully. Please <u>click here</u> to login to your account.

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