



Campaign Finance Information System Lobbyist Reporting Module

User Guide

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Revision History

Name	Date	Reason for Change	Version
Jennifer Zolikoff	06/15/2020	Base Document Update for NM Customizations	1.0
Jennifer Zolikoff	07/06/2020	Made changes based on feedback from Lori Hewig	1.1
Jennifer Zolikoff	09/01/2020	Updated the Custodian Information	1.2

1 Introduction

1.1 Purpose

This training guide is to serve as an outline for trainers from the Bureau of Elections and Ethics Division of the state of New Mexico when training end users in the use of the Lobbying Module in the Declare Ethics & Disclosure Suite. It has also been designed to be used by end users (Lobbyists, Lobbyist Employers, Lobbyist Advertising Campaigns, and Elected or Appointed Officials Lobbyist Designation Form Filers) as a quick reference to the application. Separate training guides have been developed for training of Administrative users of the Declare Ethics & Disclosure Suite, as well as, for use of the Financial Disclosure Statement Filer Module and the Campaign Finance Module.


2 System Overview

2.1.1 Common Screen Elements

Information Icon 

- These appear in various places throughout the application.
- Move your mouse over the icon (no need to click) to see a small pop-up of text which contains information relevant to the function or screen you are on.

Datagrids and Lists

- In many places, you will see data that is displayed in rows contained within multi-paged, sortable datagrids or lists.
- The grids default to 10 rows per page. At the bottom is a small dropdown where you can choose to change the grid to show 25 or 50 rows per page.
- Rows can be sorted by any column by clicking on the column heading. Click again to toggle the sort between ascending and descending sequence.
- Most rows will have one or more actions that can be taken by the user. These will appear in an action menu on each row, which is shown an ellipse  icon. Click the icon to view and select the available actions.

Dates

- When clicking into an editable date field, a calendar will pop open for you to select a date. It will default to showing the selection on the current date.
- You may scroll the calendar to get to past or future months. As an alternative, you may also click a specific month/year to get to a specific time frame immediately.
- Clicking a date will select that date, close the calendar, and display the date in the entry field.

Dropdown Lists

- Dropdown lists are used for data entry purposes when there are established standardized choices for the particular data needed. Examples include contribution type, election type, or occupation.

- In some cases, the list includes an “Other” option. If this is selected, a textbox will be shown for you to enter details or a short explanation.


Textboxes

- Textboxes are used for free-form entry of data (examples: names, addresses, city, explanations or descriptions)

Checkboxes

- Often checkboxes will be used to select options.

Action Menus

- In a list, action menus are shown as an ellipse  which can be clicked to show the list of options.
- Action menus may also show up as button. When clicked, it shows the options in a dropdown list.

2.1.2 Required Fields

Required fields are underlined in red. If the red is not present, the field is optional entry.

Occasionally a field may first be displayed as optional entry (no red underline), but during the data entry process it becomes required (red underline appears). This can occur as a result of other data values or dropdown selections that have been made which now require additional data to be provided.

If required fields do not contain data, dialogs cannot be saved. In most cases, the *Save* or *Update* buttons are disabled until all required data is present. In other cases, error messages will be shown to remind you of missing required data if you attempt to save before all required data is entered.

Note: Using the browser control buttons may result in unexpected results from within the Declare application.

2.1.3 System Notifications

Toast messages

These provide simple feedback in a small panel at the bottom of the screen. They are visible for a short while, long enough to be read, then they disappear. There is no need to respond to toast messages. An example of a toast message would be “Your report has been successfully filed”.

Pop-ups

When a message needs to be acknowledged, or you need to verify an action before it can continue, a pop-up message will be shown. You will not be able to proceed without clicking *OK* or *Cancel*. For example, if you enter an edit for a contribution and then close the dialog before saving the updates, a pop-up will be shown at the top of the screen which says, “Closing before saving will discard all

progress.” If you click *OK*, the dialog is closed as intended. If you click *Cancel*, you are returned to the dialog which remains open.

Emails

The system automatically sends email notifications which include requested information, reminders, or may be triggered by system events. For this reason, it is very important to be sure the system has your up-to-date email address. For information on updating your email address, see [Amending Your Registration](#).

Notifications include:

- Automatically sent
 - Confirmation of registration submission
 - Registration accepted
 - Registration conditionally accepted
 - Registration rejected
 - User login credential information
 - Username and/or password reminders
- Batch sent
 - Upcoming statement due reminder
 - Notification of unfiled statements
 - Notification of fines imposed

3 Registration

In order to use the Lobbyist Reporting Module of the Declare Product Suite to input data and file reports, you must register in the system and be assigned login credentials. If you already have login credentials for one of the other two modules, Campaign Finance or Financial Disclosure Statement Filer, registering with the same email will ensure that you do not get a new set of credentials.

Note: Each user of the system needs their own unique set of credentials. Do not share credentials. One reporting entity may have multiple users, for example, a lobbyist employer with an authorizing officer, a custodian, and a clerical user. Each would be issued their own set of credentials; however, they would log into the same reporting entity dashboard.

3.1 Registering for Access to the Lobbyist Reporting Module

To begin the registration process, navigate to the New Mexico Campaign Finance System site and click on the Register action link. Select the Lobbyist Reporting registration option.

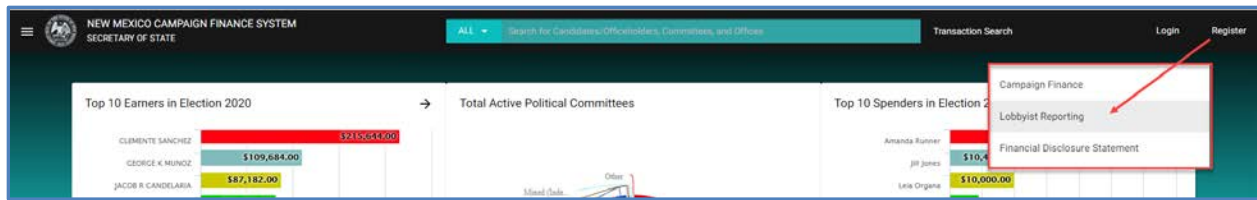


Figure 1. Homepage of the New Mexico Campaign Finance System with Register Link

An Add Registration dialog will be displayed. Select the appropriate registration type:

- ☐ Lobbyist Employer
- ☐ Lobbyist
- ☐ Lobbying Advertising Campaign
- ☐ Lobbyist Designation Form Filer

Click on the **REGISTER** button.

Figure 2. Add Registration Dialog

3.1.1 Entering Registration Information

Your registration type will determine what information is requested at the time of registration.

3.1.1.1 Lobbyist Employer

All lobbyist employers must register with the New Mexico Lobbyist Reporting Module. The Lobbyist Employer Registration screen captures the information required to register a lobbyist employer.

- ☐ Select registration year. Enter the lobbyist employer name and business interest. If you do not see the employer's business interest, select Other and write a suitable business interest in the Explanation field.
- ☐ Enter the name and title of the Authorizing Officer.

- Enter the address of the Lobbyist Employer. If the business address is different while lobbying, set the check box to true. Additional address fields will be displayed.
- Enter the phone and email of the Authorizing Officer. The **email address entered here will be the User ID for the Authorizing Officer** for logging into the Lobbyist Reporting Module.

Lobbyist Employer Registration

Registration for year
2020

Employer Name Business Interest

Authorizing Officer

Prefix First Name Middle Name Last Name Suffix

Title

Address

Country
UNITED STATES OF AMERICA

Street Address Apartment, Building, Suite, Etc.

City State NM Zip Code

Country Code +1 Phone

Email

☐ Business Address is different while lobbying


Figure 3. Lobbyist Employer Registration – Employer Information

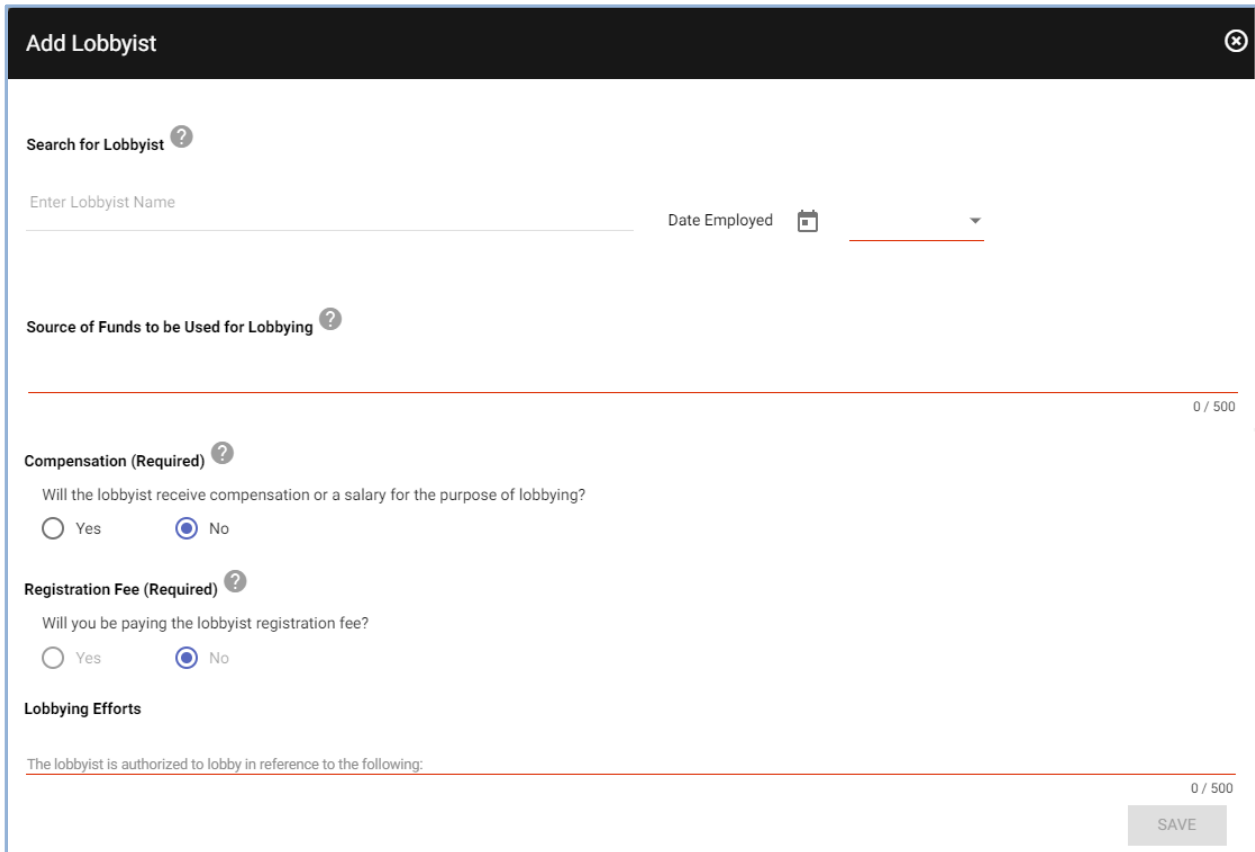
3.1.1.1.1 Adding a Registered Lobbyist During Initial Registration.

Adding a lobbyist during the initial registration is optional.

To add a lobbyist:

- Click **+ ADD LOBBYISTS** to add a lobbyist. The Add Lobbyist dialog will be displayed.
- You can search for a registered lobbyist by typing in the name of the lobbyist.
 - The system will narrow down search results based on your typing. Select the lobbyist.
 - Any lobbyist entered information regarding this employer will be visible on the Add Lobbyist dialog.


- If you cannot find the lobbyist, most likely, the lobbyist has not registered yet with the New Mexico Lobbyist Reporting System. You will need to contact the lobbyist and request that the lobbyist register with the New Mexico Lobbyist Reporting System. Once the lobbyist has registered, they will appear in the Lobbyist Search Results.
- Enter the Date Employed and the Source of Funds to be Used for Lobbying.
- Select if the lobbyist will receive compensation for the purpose of lobbying.
- If you plan to pay for the lobbyist registration fee of \$50, select Yes and you will be given the opportunity to pay the lobbyist registration fee when you submit the employer registration.
- Enter the lobbying efforts.
- If the custodian is someone other than the lobbyist or the employer, check yes and enter custodian information.
- Click  to save the lobbyist information. The information you entered will be used to create the Lobbyist Authorization form. The Add Lobbyist dialog will close and the lobbyist will be displayed on the Lobbyist Employer Registration Screen.



Add Lobbyist

Search for Lobbyist ?

Enter Lobbyist Name

Date Employed 

Source of Funds to be Used for Lobbying ?

0 / 500

Compensation (Required) ?

Will the lobbyist receive compensation or a salary for the purpose of lobbying?

☐ Yes ☒ No

Registration Fee (Required) ?

Will you be paying the lobbyist registration fee?

☐ Yes ☒ No

Lobbying Efforts

The lobbyist is authorized to lobby in reference to the following:

0 / 500

SAVE

Figure 4. Lobbyist Employer Registration – Add a Lobbyist Dialog

Add Lobbyist
0 / 500

☒ The custodian is someone other than the lobbyist or the lobbyist employer.

Custodian Information

Custodian Name

Prefix

First Name

Middle Name

Last Name

Suffix

Custodian Contact Information

Phone

Email

Custodian Address

Address 1

Address 2

City

State

Zip Code

Physical Location of Records

Address 1

Address 2

City

State

Zip Code

CANCEL

SAVE

SAVE

Figure 5. Lobbyist Employer Registration – Add a Lobbyist Dialog, Custodian Panel Visible


- To add one or more clerical users, click **+ ADD CLERICAL USERS**.
- Enter clerical user's name, address and contact information.
- Click **SAVE**. The Add Clerical User dialog will be closed, and the clerical user information will be visible on the registration screen.
- Each clerical user added on the lobbyist employer's registration will receive login credentials to access the lobbyist employer's dashboard within the Lobbyist Reporting Module when the

registration is accepted by the Bureau of Elections and Ethics Division. Clerical users will have limited functionality. They are not able to file reports.

- The email provided for each clerical user will become their User ID. For a clerical user who works with multiple lobbyist employers, if the same email address is used, they will be able to access multiple lobbyist employer dashboards with one set of login credentials.

The screenshot shows a web form titled "Add Clerical User". The form contains the following fields: "Prefix", "First Name", "Middle Name", "Last Name", and "Suffix" (all with red underlines); "Country" (a dropdown menu showing "UNITED STATES OF AMERICA"); "Address 1" and "Address 2" (both with red underlines); "City" (with a red underline), "State" (a dropdown menu showing "NM"), and "Zip Code" (with a red underline); "Country Code" (a dropdown menu showing "+1") and "Phone" (with a red underline); and "Email" (with a red underline). A "SAVE" button is located at the bottom right of the form.

Figure 6. Lobbyist Employer Registration – Add Clerical User

- After reading the acknowledgement, check the acknowledgement box and type your name as the electronic signature. Enter your title. The date will default to the current date and cannot be edited.
- When you have entered all required registration information, the SAVE button will be enabled. Ensure all information is correct.
- Click  to submit your registration. A confirmation message is displayed.
 - If you have added any lobbyists to the Lobbyist Employer registration, then the employer will be given the opportunity to pay the lobbyist(s) registration fees.
 - Each lobbyist/employer relationship requires a \$50 lobbyist registration fee. You will have the choice of paying with a credit card or an e-check. For additional information on payment, see [E-Check Payment](#) or [Credit Card Payment](#). You can also call the Bureau of Elections and request to debit your pre-paid account.
 - A confirmation message is displayed. Once you confirm, you and any clerical users listed will receive an email confirming the registration submission.

- A Lobbyist Employer Information form is generated. A Lobbyist Authorization form is generated for each selected lobbyist. These forms are accessed from the Lobbyist Employer Administration page. See [Filer Details panel](#) in the Lobbyist Employer Administration.

Figure 7. Lobbyist Employer Registration – Acknowledgement Panel

3.1.1.2 Lobbyist

All lobbyists must register with the New Mexico Lobbyist Reporting Module. The Lobbyist Registration screen captures the information required to register a lobbyist.

- Select registration year. Enter the lobbyist name and enter the address of the lobbyist. If the business address is different while lobbying, set the check box to true. Additional address fields will be displayed.
- Enter the phone and email of the lobbyist. The **email address entered here will be the User ID for the lobbyist** for logging into the Lobbyist Reporting Module.
- Optionally, a lobbyist photo can be uploaded. If a photo is uploaded, the photo will be visible in the Lobbyist Index which is available online.

Lobbyist Information

Registration for year
2020

UPLOAD PHOTO ?

Prefix First Name Middle Name Last Name Suffix

Permanent Business Address

Country
UNITED STATES OF AMERICA

Street Address Apartment, Building, Suite, Etc.

City State
NM

Country Code
+1 Phone

☐ Business Address is different while lobbying

Lobbyist Email Address

Figure 8. Lobbyist Registration – Lobbyist Information

- To add one or more lobbyist employers, click **+ ADD EMPLOYER**. The Add Employer dialog will be displayed.
- Enter lobbyist employer information.
 - You can search for a registered lobbyist employer by typing in the name of the lobbyist employer. The system will narrow down search results based on your typing. Select the lobbyist employer. Employer information will be displayed.
 - If you cannot find the lobbyist employer, most likely, the lobbyist employer has not registered yet with the New Mexico Lobbyist Reporting System. You can select the option **ADD EMPLOYER**. You will be able to enter Employer information. This does not register the employer, only capture employer information for the purpose of calculating the lobbyist registration fee. You will want to contact the lobbyist employer to request that they register with the New Mexico Lobbyist Reporting System. Both lobbyists and lobbyist employers must be registered for the employment relationship to be validated by the Bureau of Elections and Ethics Division.
- Enter Date Employed, if you will be making expenditures and contributions, and if you will be compensated.
- If you plan to pay for the lobbyist registration fee of \$50 per employer, select Yes and you will be given the opportunity to pay the lobbyist registration fee when you submit the lobbyist registration.

- Click **SAVE**. The Add Employer dialog will be closed and the lobbyist employer will be visible on the registration screen.

Figure 9. Lobbyist Registration – Add Lobbyist Employer Dialog

- Enter Harassment Training information.

Figure 10. Lobbyist Registration – Harassment Training

- To add one or more clerical users, click **+ ADD CLERICAL USERS**. The Add Clerical User dialog is displayed.
- Enter clerical user's name, address and contact information.
- Click **SAVE**. The Add Clerical User dialog will be closed, and the clerical user information will be visible on the registration screen.
- Each clerical user added on the lobbyist's registration will receive login credentials to access the lobbyist's dashboard within the Lobbyist Reporting Module when the registration is accepted by the Bureau of Elections and Ethics Division. Clerical users will have limited functionality. They are not able to file reports.
- The email provided for each clerical user will become their User ID. For a clerical user who works with multiple lobbyists, if the same email address is used, they will be able to access multiple lobbyist dashboards with one set of login credentials.

The screenshot shows a web form titled "Add Clerical User" with a close button in the top right corner. The form is organized into several sections:

- Name Section:** Fields for Prefix, First Name, Middle Name, Last Name, and Suffix.
- Country Section:** A dropdown menu currently showing "UNITED STATES OF AMERICA".
- Address Section:** Fields for Address 1 and Address 2.
- Location Section:** Fields for City, State (a dropdown menu showing "NM"), and Zip Code.
- Contact Section:** Fields for Country Code (showing "+1") and Phone (a dropdown menu).
- Email Section:** A single text field for the user's email address.

 A "SAVE" button is positioned at the bottom right of the form.

Figure 11. Lobbyist Registration – Add Clerical User

- After reading the acknowledgement, check the acknowledgement box and type your name as the electronic signature. Enter your title. The date will default to the current date and cannot be edited.
- When you have entered all required registration information, the SAVE button will be enabled. Ensure all information is correct.
- Click **SAVE** to submit your registration. A confirmation message is displayed. If you have added any employers to the Lobbyist registration, then you will be given the opportunity

to pay the lobbyist registration fees.

- On the Confirmation dialog, click **SUBMIT and PAY** if you wish to pay the lobbyist registration fee using a credit card or e-check.
 - Each compensated lobbyist/employer relationship requires a \$50 lobbyist registration fee. You will have the choice of paying with a credit card or an e-check. For additional information on payment, see [E-Check Payment](#) or [Credit Card Payment](#).
 - A confirmation message is displayed. Once you confirm, you and any clerical users listed will receive an email confirming the registration submission.
- Or on the Confirmation dialog, click **CLOSE** if you do not wish to pay using a credit card or e-check and the online site
 - The Lobbyist Registration will be submitted. The Bureau of Elections and Ethics Division will not fully accept any lobbyist registration that has an outstanding registration fee.
- A Lobbyist Registration form is generated.
- If a previously registered lobbyist employer was added to this registration, the lobbyist employer will receive a notification in their employer dashboard that they were named on a Lobbyist Registration form.

☐ I hereby certify under the penalty of law that all the information provided is true, complete and correct to the best of my knowledge.

Type Name Here

Lobbyist Electronic Signature

06/22/2020

Date of Signature

CANCEL

SAVE

Figure 12. Lobbyist Registration – Acknowledgement Panel

Note: If you have a pre-paid account with the Secretary of State, you can also call the Bureau of Elections and Ethics Division and request to debit your pre-paid account to cover the cost of the Lobbyist Registration Fee.

Note: The Bureau of Elections and Ethics Division will not fully accept a lobbyist registration until the **lobbyist employer has submitted a Lobbyist Authorization Form** and the lobbyist registration fee is paid. Without a Lobbyist Authorization Form, the employer listed on the lobbyist registration is not considered confirmed.

3.1.1.3 Lobbying Advertising Campaign

The Lobbying Advertising Campaign Registration screen captures all the required information for a Lobbying Advertising Campaign to register. If a Lobbying Advertising Campaign registers with the New Mexico Campaign Finance System, they will be expected to file a scheduled report.

- Select registration year. Select whether the advertising campaign is being conducted by an Individual or an Organization. Enter the name of the organization or the individual.
- Enter address of the advertising campaign. If the mailing address is different while lobbying, set the check box to true. Additional address fields will be displayed.
- Enter contact information for the advertising campaign, both phone number and email.

The screenshot shows a web form titled "Lobbying Advertising Campaign Registration". It contains several sections: "Registration for year" with a dropdown menu set to "2020"; "Individual or Organization Conducting Advertising Campaign" with radio buttons for "Individual" and "Organization" (the latter is selected); "Organization Name" with a text input field; "Address" section with "Country" dropdown set to "UNITED STATES OF AMERICA", "Street Address" and "Apartment, Building, Suite, Etc." text fields, "City" text field, "State" dropdown set to "NM", and "Zip Code" text field; a checkbox for "Mailing address if different" which is unchecked; "Contact Information" section with "Country Code" dropdown set to "+1", "Phone" text field, and "Email" text field. Red lines indicate required fields.

Figure 13. Lobbying Advertising Campaign – Advertising Campaign Information

- Enter information about the person registering this lobbying advertising campaign. The email entered here will be the User ID for the person registering.

Person Registering

Prefix ▼ First Name Middle Name Last Name Suffix ▼

Country Code +1 Phone

Email

Figure 14. Lobbying Advertising Campaign Registration – Person Registering

- Click **+ ADD PRINCIPAL OR ORGANIZER** to add one or more principals and or organizers. The Add Principal/Organizer dialog is displayed.
- Enter name, occupation, and address information. Once all required information is entered, the Save button is enabled.
- Click **SAVE** to save the principal or organizer. The Add Principal/Organizer dialog will be closed and the principal/organizer information will be displayed on the Lobbying Advertising Campaign Registration screen.

Add Principal

Prefix ▼ First Name Middle Name Last Name Suffix ▼

Occupation

Country UNITED STATES OF AMERICA ▼

Street Address Apartment, Building, Suite, Etc.

City State NM Zip Code

SAVE

Figure 15. Lobbying Advertising Campaign – Add Principal/Organizer Dialog

- To add one or more officers, click **+ ADD OFFICER**. You will be given a choice of officer or clerical user. Select one of the choices. The Add Officer/Clerical User dialog is displayed.
- Enter name, title, address and contact information. Once all required information is entered, the Save Button is enabled.

- Click **SAVE**. The Add Officer/Clerical User dialog is closed, and the officer/clerical user information is visible on the Lobbying Advertising Campaign Registration screen.
- Each officer/clerical user added on the lobbying advertising campaign's registration will receive login credentials to access the lobbying advertising campaign's dashboard within the Lobbyist Reporting Module when the registration is accepted by the Bureau of Elections and Ethics Division. Clerical users will have limited functionality. They are not able to file reports.
- The email provided for each officer/clerical user will become their User ID. For an officer/clerical user who works with multiple lobbying advertising campaigns, if the same email address is used, they will be able to access multiple lobbying advertising campaigns' dashboards with one set of login credentials.

Figure 16. Lobbying Advertising Campaign Registration – Add Officer/Clerical User Dialog

- If you do not have any Lobbyists or Lobbyist Employers as members of this lobbying advertising campaign, check the **None** checkbox.
- Click **+ ADD LOBBYIST OR LOBBYIST EMPLOYER** to add one or more lobbyists or lobbyist employers. You will be given a choice of adding a lobbyist or adding a lobbyist employer. Select one of the choices. The Add Lobbyist / Lobbyist Employer dialog is displayed.
- You can search for a registered lobbyist / lobbyist employer by typing in the name of the lobbyist or lobbyist employer. The system will narrow down the search results based on your

typing. Select the lobbyist or lobbyist employer. If you cannot find the lobbyist or lobbyist employer, most likely, they have not registered yet with the New Mexico Lobbyist Reporting System. Both lobbyists and lobbyist employers must be registered in order to add them to the registration. Contact the appropriate entity if they are not registered and request them to register.

- Click **SAVE** to save the lobbyist / lobbyist employer. The Add Lobbyist / Lobbyist Employer dialog is closed and lobbyist / lobbyist employer information is displayed on the Lobbying Advertising Campaign Registration screen.

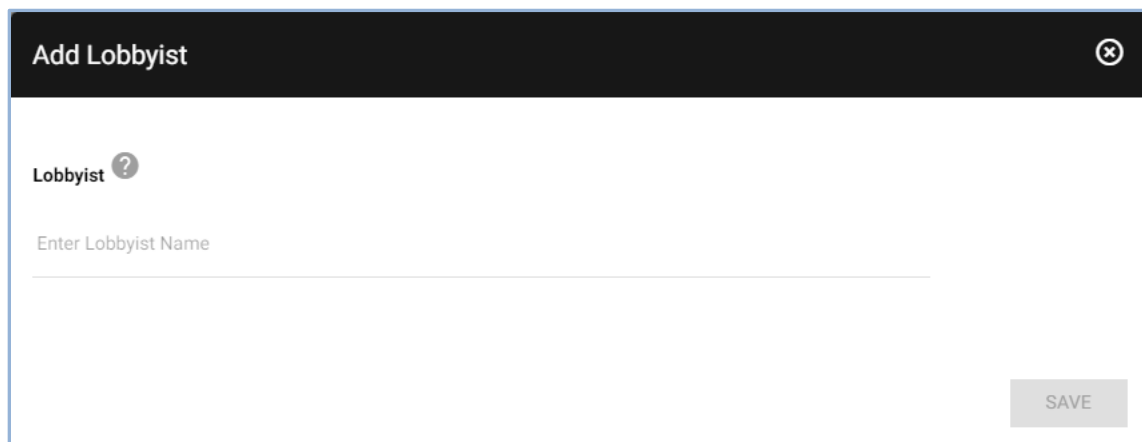


Figure 17. Lobbying Advertising Campaign Registration – Add Lobbyist / Lobbyist Employer Dialog

- After reading the acknowledgement, check the acknowledgement box and type your name as the electronic signature. Enter your title. The date will default to the current date and cannot be edited.
- When you have entered all required registration information, the SAVE button will be enabled. Ensure all information is correct.
- Click **SAVE** to submit your registration. A confirmation message is displayed. Once you confirm, you and any officers/clerical users listed will receive an email confirming the registration submission.
- A Lobbying Advertising Campaign Registration form is generated.



Figure 18. Lobbying Advertising Campaign Registration – Acknowledgement Panel

3.1.1.4 Appointed or Elected Official Lobbyist Designation Form Filer

All Lobbyist Designation Form Filers must register with the New Mexico Lobbyist Reporting Module. The Lobbyist Designation Form Filer Registration screen captures the information required to register and file an Appointed or Elected Official Lobbyist Designation Form.

- Select registration year. Specify if you are an elected official or an appointed official.
- Enter name and office information.
- Enter business address and contact information. The **email address entered here will be the User ID for the Lobbyist Designation Form Filer** for logging into the Lobbyist Reporting Module.

Lobbyist Designation Form Filer

Filing year
2020

Are you an elected official or an appointed official making this designation?
☒ Elected Official ☐ Appointed Official

Office

Prefix First Name Middle Name Last Name Suffix


Business Address

Street Address Apartment, Building, Suite, etc.
City State NM Zip Code

Contact Information

Email Phone

Figure 19. Lobbyist Designation Form Filer Registration Screen – Lobbyist Designation Form Filer Information

- Enter the staff member name and the staff member title of the employee who is authorized to explain the effect of legislation.
- To add the staff member, click . The authorized staff member's name and title will be visible on the registration screen. Repeat this process for each staff member that is authorized to speak.
- Enter your name as the electronic signature. The date will be defaulted to the current date. This field cannot be edited. Once all required information is entered, the Save button is enabled.

- Click **SAVE** to submit your registration. A confirmation message is displayed. Once you confirm, you will receive an email confirming the registration submission.
- An Appointed or Elected Official Lobbyist Designation Form is generated.

Figure 20. Lobbyist Designation Form Filer Registration – Staff Members and Electronic Signature

3.1.2 When your Registration is Accepted

When your registration is submitted, the staff of the Bureau of Elections and Ethics Division will review your registration. Once they approve it, your filer account will be made active in the system and you and any clerical users listed will receive a confirmation email.

If your registration is rejected, you will receive an email with the rejection reason.

If your registration is conditionally accepted, you will receive an email with the reason for conditional acceptance. You will be able to log into the system, enter transactions, pay any fees, and amend your registration; however, you will not be able to file any lobbyist reports until the conditional acceptance is removed by the staff of the Bureau of Elections and Ethics Division. Conditional acceptance may be granted if a Lobbyist Authorization Form needs to be generated by a lobbyist employer or a registration fee needs to be paid.

3.1.3 Receiving Login Credentials

Login credentials will automatically be assigned when the registration is accepted or conditionally accepted by the staff of the Bureau of Elections and Ethics Division. Login credentials will automatically be assigned to the following:

- All registered lobbyists
- Any authorizing officer and or custodian entered on a lobbyist employer registration
- All clerical users entered on a lobbying registration form
- Person Registering or Officers of the Lobbying Advertising Campaign
- Appointed or Elected Official Lobbyist Designation Form Filer

The above-mentioned individuals will receive an email containing instructions for logging in. The credentials generated by following the instruction received will allow you to access the Lobbyist Reporting module. If the same email was used with both the Lobbyist Reporting module, the Financial Disclosure Statement Filer module or the Campaign Finance module, you do not need to authenticate the account again. You can proceed directly to signing in with the credentials you already have for any of the New Mexico Campaign Finance System modules. When one email is used to register, the same credential can be used for any module that you have access to.

4 Your Filer Dashboard

4.1 Signing In

To begin the sign in process, navigate to the New Mexico Campaign Finance System public site. Select the *Login* link in the page header. The Registered User Login dialog is displayed.

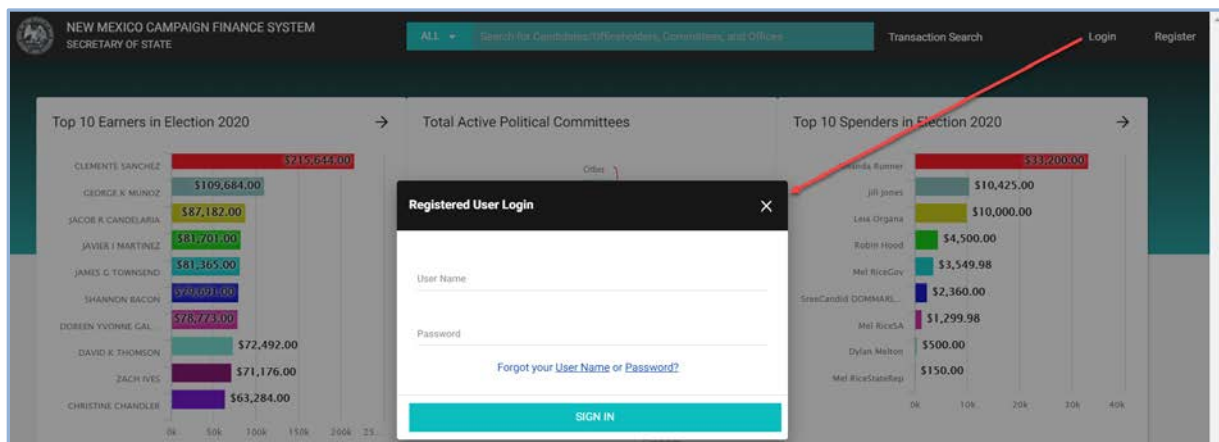

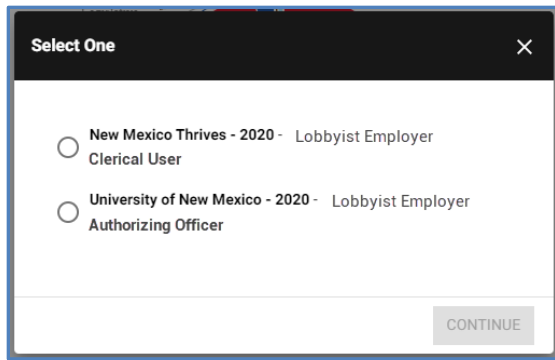


Figure 21. Login Dialog

Note: If you have forgotten your User Name or Password, there are links to retrieve your User Name and reset your password on the Login dialog.

- Enter your username and password. Click  .
- If you only have access to the Lobbyist Reporting Module and your email is only associated to one lobbying entity, you will be taken directly to the Lobbying Filer Dashboard.
- If you have access to more than one Declare module or access to more than one lobbying entity in the Lobbyist Reporting module, you will see a list of all entities you are associated to in the Lobbyist Reporting module, Campaign Finance module and/or the Finance Disclosure Statement Filer module. Select the desired reporting entity. You will then be directed to the Home page for your selected entity.



A dialog box titled "Select One" with a close button (X) in the top right corner. It contains two radio button options:

- ☐ New Mexico Thrives - 2020 - Lobbyist Employer Clerical User
- ☐ University of New Mexico - 2020 - Lobbyist Employer Authorizing Officer

At the bottom right, there is a "CONTINUE" button.

Figure 22. Select Committee Dialog

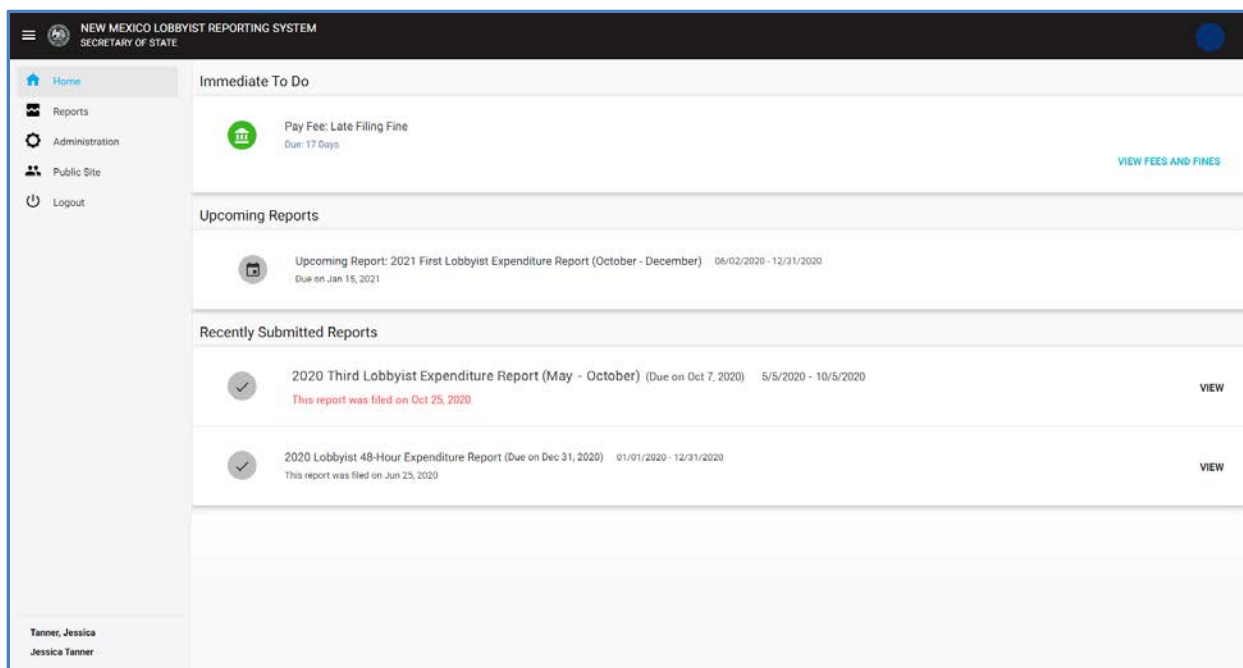
4.2 Dashboard Overview

4.2.1 Home Page

Upon logging into the system, you will be on the home page for your dashboard. The dashboards for the different lobbying entities are very similar. The functionality will be explained in this section and any differences will be called out.

When the home page is first opened, the center portion of the screen shows the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list. Only the header will be visible if there is no data to display.

If you navigate to another functional area from the Dashboard Navigational Menu on the left-hand side of the screen, the center portion of the screen will be overlaid with different functions as you select navigational menu options. Clicking the *Home* menu option returns the screen to its initial format with the three lists.



The dashboard is titled "NEW MEXICO LOBBYIST REPORTING SYSTEM" and "SECRETARY OF STATE". It features a left-hand navigational menu with the following options: Home, Reports, Administration, Public Site, and Logout. The main content area is divided into three sections:

- Immediate To Do:** Displays a "Pay Fee: Late Filing Fine" with a due date of "Due: 17 Days" and a "VIEW FEES AND FINES" link.
- Upcoming Reports:** Displays an "Upcoming Report: 2021 First Lobbyist Expenditure Report (October - December)" with a due date of "Due on Jan 15, 2021".
- Recently Submitted Reports:** Displays two reports:
 - "2020 Third Lobbyist Expenditure Report (May - October) (Due on Oct 7, 2020)" with a status of "This report was filed on Oct 25, 2020" and a "VIEW" link.
 - "2020 Lobbyist 48-Hour Expenditure Report (Due on Dec 31, 2020)" with a status of "This report was filed on Jun 25, 2020" and a "VIEW" link.

At the bottom left, the user's name "Tanner, Jessica" and "Jessica Tanner" are displayed.

Figure 23. Lobbyist Filer Dashboard, Home Page

4.2.1.1 Immediate To Do

The Immediate To Do list shows you items that you need to be aware of or that need to be completed.

Immediate To Dos are created in the following situations:

- When a lobbyist is eligible to renew for the upcoming lobbying year. Clicking on the **Registration Renewal** action link will display the [Registration Renewal](#) screen.
- When a registration has been conditionally accepted. Clicking on the **Amend Registration** action link will display the [Registration Amendment](#) screen.
- When an outstanding fee or fine needs to be paid. Clicking on the **View Fees and Fines** action link will display the [Fees and Fines tab](#) on the Administration page.
- When you have started filing a report or an amendment, however, you left the screen without filing the report. Clicking on the **Preview** action link will display a pdf of the report. Clicking on the **File Report** action link will display the [File Report screen](#).
- If you have a late report that needs to be filed. Clicking on the **Preview** action link will display a pdf of the report. Clicking on the **File Report** action link will display the [File Report screen](#).
- If you have an upcoming report due. Clicking on the **Preview** action link will display a pdf of the report. Clicking on the **File Report** action link will display the [File Report screen](#).
- If you are a lobbyist employer and a lobbyist has included you on their registration. Clicking on the **Amend Registration** action link will display the [Registration Amendment](#) screen.








Immediate To Do		
	Registration for Upcoming Year	REGISTRATION RENEWAL
	Conditionally Accepted Registrations	AMEND REGISTRATION
	Pay Fee: Late Filing Fine Due: 2 Days	VIEW FEES AND FINES
	Reports Pending: 2020 Third Lobbyist Expenditure Report (May - October) 05/05/2020 - 10/05/2020 Due in 70 Days (Due Date: 10/07/2020)	PREVIEW FILE REPORT
	Report Overdue: 2020 Second Lobbyist Expenditure Report (January - May) 01/03/2020 - 05/06/2020 38 Days late (Due Date: 05/06/2020)	PREVIEW FILE REPORT
	Report Due: 2020 Second Lobbyist Expenditure Report (January - May) 01/01/2020 - 05/04/2020 Due in 3 Days (Due Date: 07/02/2020)	PREVIEW FILE REPORT
	Lobbyist submitted a registration with Emerald City Charitable Organization listed as the employer.	AMEND REGISTRATION

Figure 24. Example of Immediate To Dos

4.2.1.2 Upcoming Reports

The Upcoming Reports List shows you which reports are going to be coming due.

4.2.1.3 Recently Filed Reports

The Recently Filed Reports list shows you all reports that were most recently filed. On each, there is a *View* action link which will show you a PDF of the filed report.

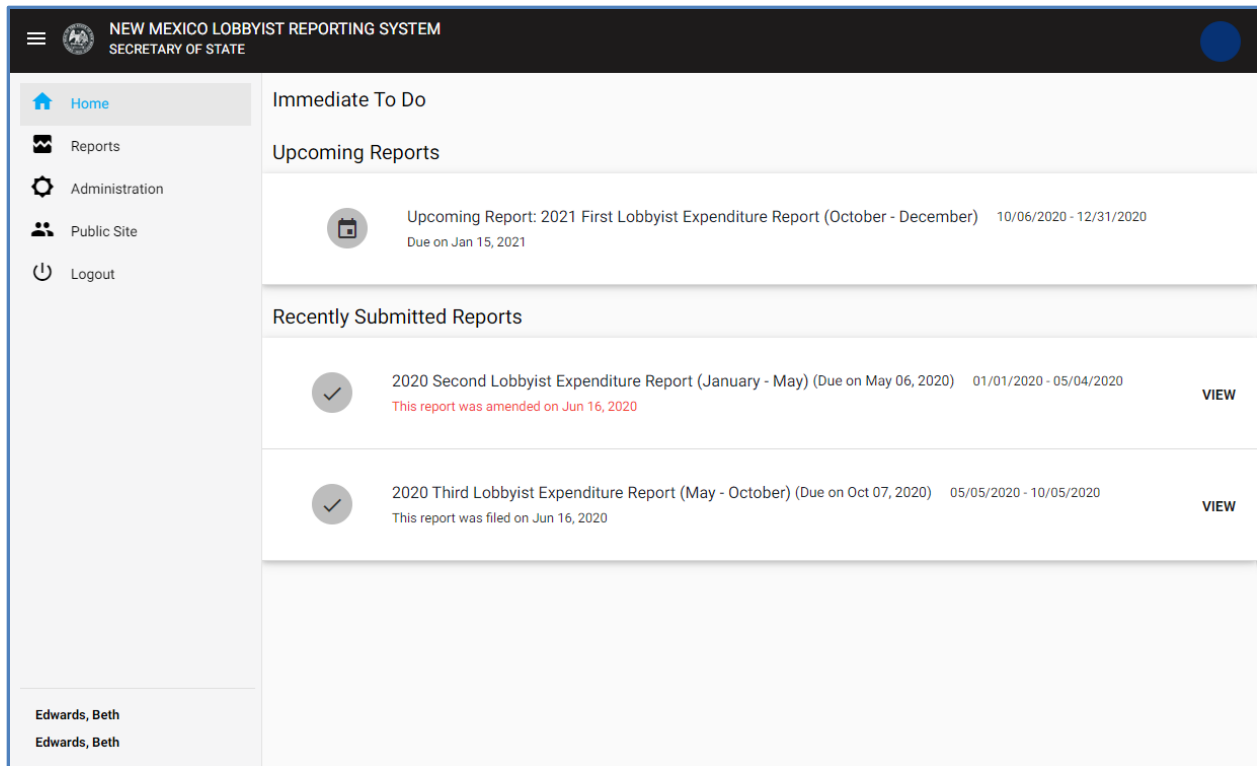




Figure 25. Filer Dashboard – Navigational Menu – Home Page

4.2.1.4 Dashboard Navigational Menu

The Dashboard Navigational Menu is on the left side of the screen. Each item in the menu, when clicked, will open up in the center part of the screen. Clicking the *Home* menu option returns the screen to its default view with the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list showing.

Clicking the  icon located in the upper left-hand corner in the header above the Dashboard Navigational Menu panel will hide/display the Dashboard Navigational Menu panel.

Clicking the  icon located in the upper right-hand corner in the header above the Lobbying Entity Details panel will hide/display the Lobbying Entity Details panel.

5 Filing Reports

When the Bureau of Elections and Ethics Division accepts your registration, the lobbying entity will be assigned filing obligations. The reporting assignments you receive depend on your filer type, as follows:

- Lobbyists will be assigned scheduled reports covering the reporting periods of the registered lobbying year.

- Lobbyist Employers will have access to reports; however, they are not required to file unless they have transactions to report.
- Lobbying Advertising Campaigns will be assigned one report for the registered lobbying year.
- Lobbyist Designation Form Filers will not be assigned any reports. They do not have reports to file. The Appointed and Elected Official Lobbyist Designation Form is filed at the time of registration.

Additionally, during certain time periods such as the legislative session, lobbyist and lobbyist employers will have access to the 48-Hour Report.

5.1 Viewing Your Filing Schedule

The Reports Screen contains both the reporting entity's filing schedule and listings of filed, unfiled and pending reports. You will be able to preview, file, and amend reports. Lobbyists / Lobbyist Employers / Lobbying Advertising Campaign will follow the same process for filing.

To access the Reports Screen,

- From the Dashboard Navigational Menu, click on the Reports option. The Reports Screen will be displayed.

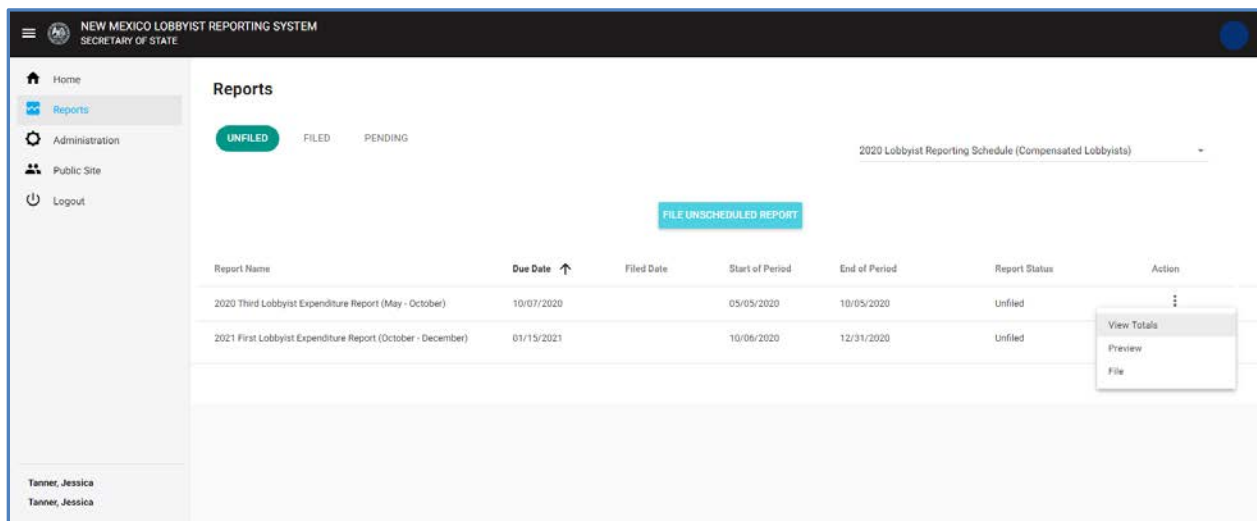



Figure 26: Reports Screen – Unfiled Reports

- The **Unfiled Reports** list shows each report that has been scheduled, but is not yet filed. This also includes access to unscheduled reports that can be pulled down into your filing schedule. If the report has been started and saved, but not yet submitted, it still shows in the Unfiled list.
- Reports are listed in the order they are due, and the system requires that reports be filed in the order in which they are due.
- A report whose period end date is the current date or in the past will also appear in the [Immediate To Do list](#) on the Home page. You may also preview and file the report from

there as well.

- If the **FILE UNSCHEDULED REPORT** button is not visible that means there are no unscheduled reports that are available for filing.
- The **Filed Reports** list shows each filed report and any amendments that are associated with that report. Once a report is filed, it is shown in the Filed list, and is removed from the Unfiled list.
 - If the report has had an amendment, it also is shown. All versions of a report (original filing and amendments) are shown in the expandable/collapsible panel under the main report row. This panel is opened and closed by clicking the caret icon next to the report name. See [Amending Filed Reports](#).
- The **Pending Reports** list shows any report where the filing process has been started, however, the report hasn't been submitted, this includes amendments that have been started but not submitted, as well.
 - A started unfiled report will be found in both Unfiled and Pending.
 - A started unfiled amendment will be found in both Filed and Pending.
- In each list, the reports have an Action Menu which is obtained by clicking the  icon. It contains one or more options, depending on the status of the report. Descriptions of the options are below.
 - Options that are available on **Unfiled Reports**:
 - *Preview* – This link allows you to review the contents of a report without filing it. A PDF of the report in a draft version will be displayed. This action does not file the report.
 - *File* – This link opens the [File Reports Screen](#). From here, you can file a report.
 - *Resume* – This link pertains to those Unfiled Reports that have been saved for later and is used to continue working on your report. It will open the File Report screen.
 - Options that are available on **Pending Reports**:
 - *Preview* – This link allows you to review the contents of a report without filing it. A PDF of the report in a draft version will be displayed. This action does not file the report.
 - *Resume* – This link pertains to those Unfiled Reports that have been saved for later and is used to continue working on your report. It will open the File Report screen.
 - Options that are available on **Filed Reports**:
 - *View* – This link displays a PDF of the filed report. For amended reports, each version can be viewed. This is also the version that is visible on the public site.

- Amend – This link opens the File Reports Screen and allows you to make changes. Your report information will show up as it was when you last filed the report. You can enter modifications as needed, and, like the original filing process, you can either exit the amendment and it will be placed in the Pending Reports List in order to complete it later, or you can file it.
- Options that are available to **Unfiled, Pending and Filed Reports**:
 - *View Totals* – This link opens the File Reports Screen in a read only mode. It displays all information that was entered into the File Reports Screen.

5.2 Filing Your Report

Filing a report consists of entering transactions within that report and then filing. Transaction entry is integrated with report filing. To begin the filing process, click the ***File*** option in the action menu from the Reports Screen. The system will open the File Report Screen to allow you to enter transactions and submit the selected report.

When the File Report Screen is first opened, you will see the header located at the top of the File Report Screen. The header area includes the name of the report, the number of days until the report is due, and an arrow to return to the Reports screen. The *Preview* and *File* action links are also located in the header.

The File Report Screen will contain a list of transaction categories. These category names are collapsed panels where report information will be entered. After transaction information is entered, summary totals are calculated and displayed. The transaction categories displayed correspond to the registration type of the filer.

Lobbyist / Lobbyist Employer Transaction Categories:

- Expenditures
- Special Events
- Political Contributions



Note: When a report is filed with a political contribution in support of a specific candidate, the system will create an Immediate To Do for the candidate in the Campaign Finance Module letting them know they have been reported as the recipient of a political contribution.

Lobbying Advertising Campaign Categories

- Expenditures
- Contributions

5.2.1 Entering Transactions


All transactions are entered on the File Report Screen.

- To enter one or more transactions, click  to open the Add Transaction dialog.
 - Enter transaction information. The transaction date must fall within the reporting period begin and end dates.
 - Click  to create the transaction. The Add Transaction dialog will remain open for another entry. When you have entered all the transactions, close the dialog. Entered transactions are displayed on the File Report Screen.
 - Repeat this process for each transaction type or if you do not have any transactions of this type to report, check the **None** checkbox.

Note: At this point, transactions are not saved. If you click refresh on the browser, the File Report Screen is reset and any unsaved transactions are lost. Report information is saved when you click the back arrow on the File Report screen or when you file the report.

5.2.2 Previewing and Filing the Report

After all transactions have been entered, you can preview or file the report.

- Click the **Preview** action link to review the contents of a report without filing it. A PDF of the report in a draft version will be displayed.
- Click the **FILE** action link to submit the filing. The Electronic Signature Confirmation dialog will be displayed.
- Type your name into the Electronic Signature field. Enter your title. The date will be defaulted to the current date and cannot be edited.
- Click  .
- After you file your report, the report is moved to the Filed Reports list on your Reports screen. You will receive an email confirming that the report was successfully filed. The report and all transactions included on it are now available for view on the public site.
- **For an amendment**
 - There will be an *Amend* link instead of the *File* link.

- The Previous Versions section located at the bottom of the File Reports Screen will list the dates of all prior versions of the statement that have been filed, and a link to view each one. This section will only be visible if there is data to display.

NEW MEXICO LOBBYIST REPORTING SYSTEM
SECRETARY OF STATE

← 2020 Third Lobbyist Expenditure Report (May - October) : 05/05/2020 - 10/05/2020 [PREVIEW](#) [FILE REPORT](#)

Filing is in progress

Statement of No Activity
☐ I Tanner, Jessica registered lobbyist for the state of New Mexico hereby declare that I did not have any contributions or expenditures since my last report was filed.

Expenditures
☐ None [+ ADD](#)

Date	Payee	Beneficiary	Expenditure Type	Purpose	On Behalf Of	Amount	Actions
06/09/2020	Kirkos	various	Other Expenditures	to make copies	Freepoint-McMoran, Inc.	\$200.00	⋮

Total Meal and Beverage Expenses: \$0.00
 Total Other Entertainment Expenses: \$0.00
 Total Other Expenses: \$200.00
 Total Expenditures: \$200.00

Special Events
☐ None [+ ADD](#)

Date	Type of Event	Location	Group(s) Invited	Total Expenses	Actions
05/08/2020	Fundraiser	City Park	House Democratic Caucus House Republican Caucus	\$900.00	⋮

Total Special Events: \$900.00

Political Contributions
☐ None [+ ADD](#)

Date	Name/Ballot Question	Stance	Contribution on Behalf Of	Amount	Actions
06/03/2020	ANKREE BACZKIEWICZ, LEAH MICHELLE	Support	Freepoint-McMoran, Inc.	\$600.00	⋮

Total Political Contributions: \$600.00

Tanner, Jessica
Tanner, Jessica

Figure 27. File Report Screen for Lobbyists or Lobbyist Employers

Statement of No Activity – if you do not have any financial activity to report during the specified reporting period, check the Statement of No Activity checkbox. If you do not have any financial activity entered, the File Report action link will remain grayed out until the Statement of No Activity checked.

← 2021 First Lobbyist Expenditure Report (October - December) : 10/06/2020 - 12/31/2020 [PREVIEW](#) [FILE REPORT](#)

Due in 142 days (Due Date: 01/15/2021)

Statement of No Activity
☒ I Edwards, Beth registered lobbyist for the state of New Mexico hereby declare that I did not have any contributions or expenditures since my last report was filed.

Figure 28. File Report Screen – Statement of No Activity

5.2.3 Viewing / Editing / Deleting Transactions

The File Report Screen includes a transaction summary grid for each transaction type that is relevant to the lobbying entity. Each transaction contains an action menu that allows you to edit or remove the transaction.

- To edit a transaction, select the transaction and click on **Edit** in the action menu. The Edit Transaction dialog is displayed.
- For edits or amends, the dialog looks and acts like the Add New dialog, with the exception that the current transaction information is pre-populated on the screen.
- To remove a transaction, select the transaction and click on **Remove** in the action menu. A pop-up message is displayed asking you to confirm that you want to remove the record. Once confirmed, focus is returned to the File Report screen. The transaction is no longer visible in the transaction grid.

The screenshot shows the 'Expenditures' screen with a table of transactions. The table has columns for Date, Payee, Beneficiary, Expenditure Type, Purpose, On Behalf Of, Amount, and Actions. Two transactions are listed. The first transaction is dated 10/07/2020, for Cafe Press, Water and Natural Resources Committee, Other Expenditures, for Jerseys for Hoops for Hope, on behalf of The College Board, with an amount of \$300.00. The second transaction is dated 11/15/2020, for Party City, LFC Staff, Other Entertainment expenditures, for Purchase party supplies for fundraiser, on behalf of Freeport-McMoran, Inc., with an amount of \$400.00. An action menu is open for the second transaction, showing 'Edit' and 'Remove' options. Below the table, there are summary totals: Total Meal and Beverage Expenses: \$0.00, Total Other Entertainment Expenses: \$400.00, Total Other Expenses: \$300.00, and Total Expenditures: \$700.00.

Date	Payee	Beneficiary	Expenditure Type	Purpose	On Behalf Of	Amount	Actions
10/07/2020	Cafe Press	Water and Natural Resources Committee	Other Expenditures	Jerseys for Hoops for Hope	The College Board	\$300.00	⋮
11/15/2020	Party City	LFC Staff	Other Entertainment expenditures	Purchase party supplies for fundraiser	Freeport-McMoran, Inc.	\$400.00	Edit Remove

Total Meal and Beverage Expenses: \$0.00
 Total Other Entertainment Expenses: \$400.00
 Total Other Expenses: \$300.00
 Total Expenditures: \$700.00

Figure 29. File Report Screen, Transaction Summary Grid, Action Menu Choices Visible

5.2.3.1 Differences between Unfiled and Filed Transactions (Edit vs. Amend)

When a transaction is first entered on the File Report screen and until it is filed on the report, it can be updated or removed without the system saving any history of the prior version. This is referred to as an Edit.

Once a transaction is filed on a report, that version of the transaction is saved in history. This is preserved, and any updates will create a new version of the transaction listed on the amended report. This is referred to as an Amend. Anytime a transaction is added, edited, or removed from a filed report, you will be required to refile (amend) the report on which it was reported. A reminder for this will show up in your Immediate To Do list.

5.3 Amending Your Report

A report will need to be amended if a new transaction needs to be added or if a previously filed transaction needs to be modified or deleted from a report. You can amend a report for the current period or from previous reporting periods (within limits set by the Secretary of the State).

To amend a filed report, go to the Filed Reports tab on the Reports screen. From the action menu, select **Amend**. The File Report Screen will be displayed with the filed information.


- Enter any necessary changes.
- Click the **File Report** action link to file the amended report.

If you start the amendment but do not file the amendment, you will see an [Immediate To Do](#) item on your Home page as a reminder.

There are two ways to finish filing the amended report:

- You will be able to file the amendment directly from that reminder, by clicking **File Amended Report**.
- You can also file the amendment from the Pending Reports list or Filed Reports list by clicking the **Resume** option in the action menu. The report will have a status of Amendment Saved for Later.

Either way you choose, the [File Report Screen](#) for the selected report will be opened.

- The File Report Screen will be opened with all of the previously filed information pre-populated. Previously Filed Versions are displayed at the bottom of the screen.
- The **File Report** action link will be enabled once the required information is entered.
- When you are ready to refile the amended report, click the **File Report** action link at the top of the screen. The Electronic Signature Confirmation dialog will be displayed.
- Type your name into the Electronic Signature field. Enter your title. The date will be defaulted to the current date and cannot be edited.
- Click  .
- After you file the amendment, the report is moved back to the Filed Reports list on your Reports screen. You will receive an email confirming that the report was successfully filed. The report and all transactions included on it are now available for view on the public site.

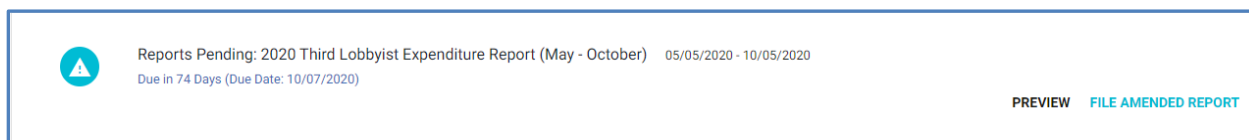


Figure 30. Immediate To Do – Reminder to Amend Report

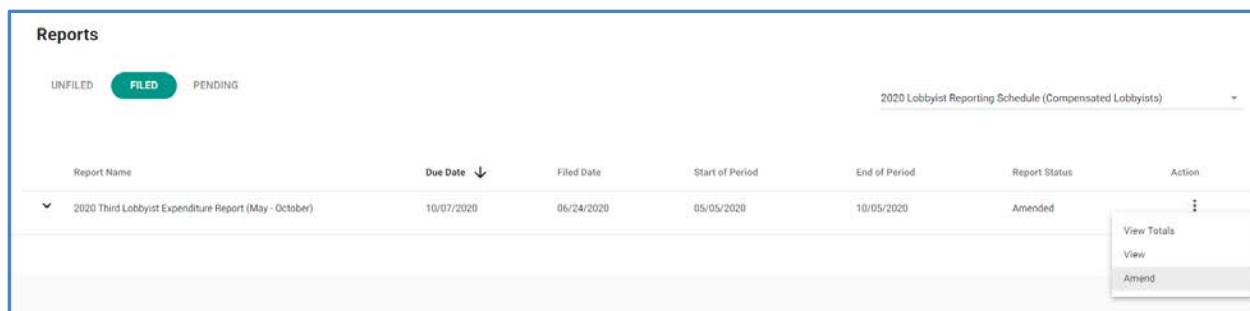


Figure 31. Reports Screen, Filed Tab – Amend Action Menu Item

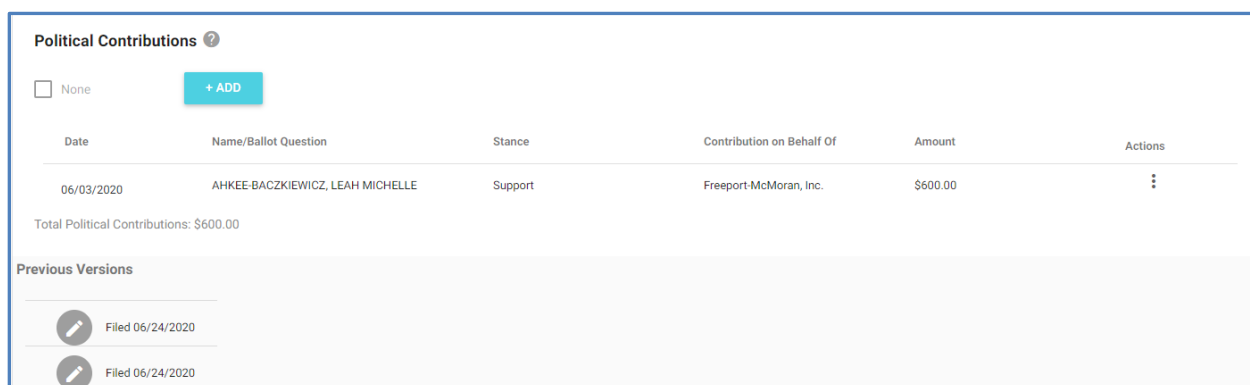


Figure 32. File Report Screen in Amend Mode – Partial View – Bottom of the Screen showing Filed Transaction and Previous Versions of Filed Report

5.4 Viewing Filed Reports

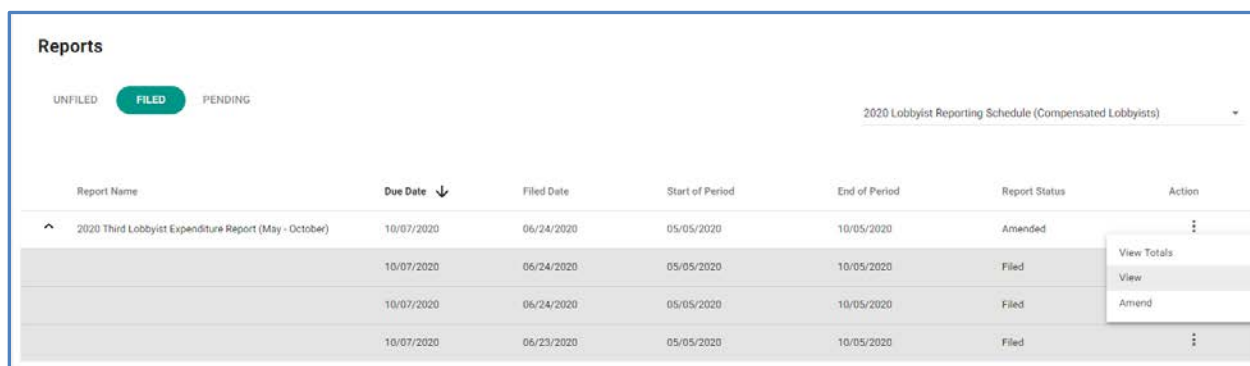


Figure 33. Reports Screen – Filed Reports List – View Action Menu Item

- On the Reports screen, click the *Filed* tab.
- A list of all your filed reports is displayed, filtered by the selected filing cycle shown in the dropdown.

- To view reports from a different filing cycle, select the new cycle in the dropdown.
- If there have been amendments, the report will have an expandable/collapsible list of amendments below it.
- All reports and amendments will have an action menu with a *View* link which can be used to display a PDF of the report.

5.5 If You File Late

If you file after the report due date as listed in the [Reports Screen](#), the system will automatically assess the appropriate fine against the reporting entity. Fines will continue to accrue until the report is filed. You will receive a correspondence informing you of the missed reporting deadline and the resulting fine. Correspondence can be viewed in the [Correspondence / Documents Images Tab](#) on the Administration Page. The Fine can be viewed in the [Fees and Fines Tab](#) also on the Administration Page. A Not Compliant status will be visible on the public site.

To return to a compliant state, the reporting entity must:

- File the late report including a written explanation for the late report.
- Pay the assessed fine. (See [Viewing Fees and Fines](#) section for Payment Functionality.)

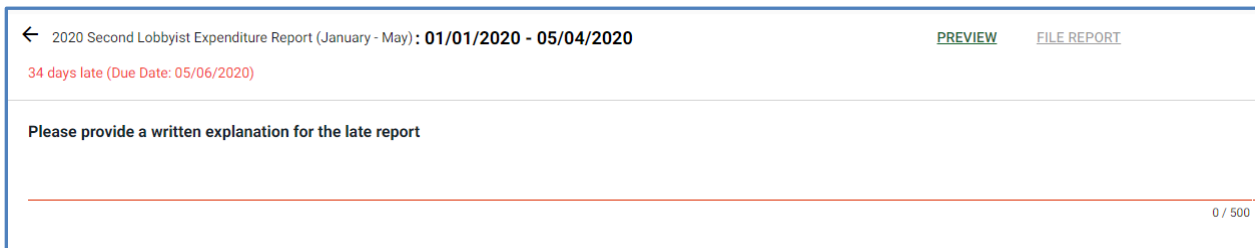


Figure 34. File Report Screen for a Lobbyist or Lobbyist Employer with Late Explanation

5.5.1 Requesting Arbitration

If you receive a Notice of Final Action letter through certified mail, you may be eligible to request arbitration.

- Click **REQUEST ARBITRATION** to begin the arbitration process. The Add Arbitration Request dialog is displayed. Any fine that is eligible for arbitration will be listed at the top of the dialog.
 - The dates for the arbitration request window are displayed on the screen. The Request Arbitration button will only be visible during the listed time frame.

- After reading the acknowledgements, set the checkboxes to true.
- Enter the grounds for protest. You have 1,000 characters.
- Select the preferred arbitrator.
- Type your name as the electronic signature. The date is defaulted to the current date and cannot be edited.
- Click **SUBMIT REQUEST** to save and submit the arbitration request to the Bureau of Elections and Ethics Division. An Arbitration Request PDF will be generated and stored in the Correspondence / Document Images Tab. On the Fees and Fines Tab, the arbitration indicator will be set to true for the selected fine.

LOBBYIST EMPLOYER(S)		● FEES AND FINES		CORRESPONDENCE / DOCUMENT IMAGES		
Outstanding ▾				PAY FEES OR FINES		REQUEST ARBITRATION
Date	Status	Description	Original Amount	Balance	Arbitration	Actions
06/24/2020	Outstanding	Late Filing Fine - 2020 Third Lobbyist Expenditure Report (May - October) - 06-11-2020	\$450.00	\$450.00	<input type="checkbox"/>	⋮
Total Outstanding Balance				\$450.00		

Figure 35. Fees and Fines Tab from Lobbyist Dashboard with Request Arbitration

Figure 36. Add Arbitration Request Dialog

The Administration page has a variety of administrative functions and general information about the lobbying entity.

From the Lobbyist Administration page, you can view your assigned filing cycle. When you first register, if the lobbyist employer relationship has not been confirmed with a Lobbyist Authorization Form, you will be assigned to a non-compensated filing cycle. A non-compensated filing cycle does not have any scheduled filing obligations (reports). Once the Bureau of Elections and Ethics Division has confirmed employment, you will be assigned to a compensated filing cycle where you will be assigned scheduled reports.

If your registration is conditionally accepted, you will receive an email and see a notification on your Administration page.

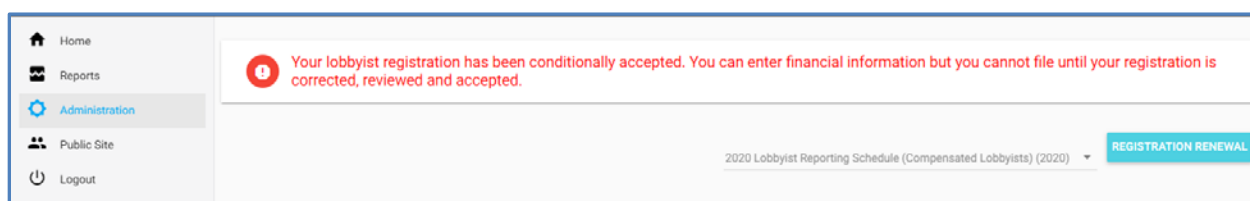


Figure 37. Administration Page, Conditionally Accepted Message. Assigned Filing Cycle visible.

You will also have an immediate to do which contains a message from the Bureau of Elections and Ethics Division concerning the conditional acceptance of your registration.

- If you did not list an employer on your registration, click on the **AMEND REGISTRATION** action link to add a lobbyist employer. [See Amending Your Registration](#)
- If you did not pay your lobbyist registration fee, pay the registration fee. [See Make a Payment.](#)
- If you are waiting on a Lobbyist Authorization Form, contact your employer.

Note: You can view your Lobbyist Authorization Form, by searching for the Lobbyist Employer on the public site. Once the employer is found, click on View Registration. The Lobbyist Authorization Form is always coupled with the Lobbyist Employer Information Form.

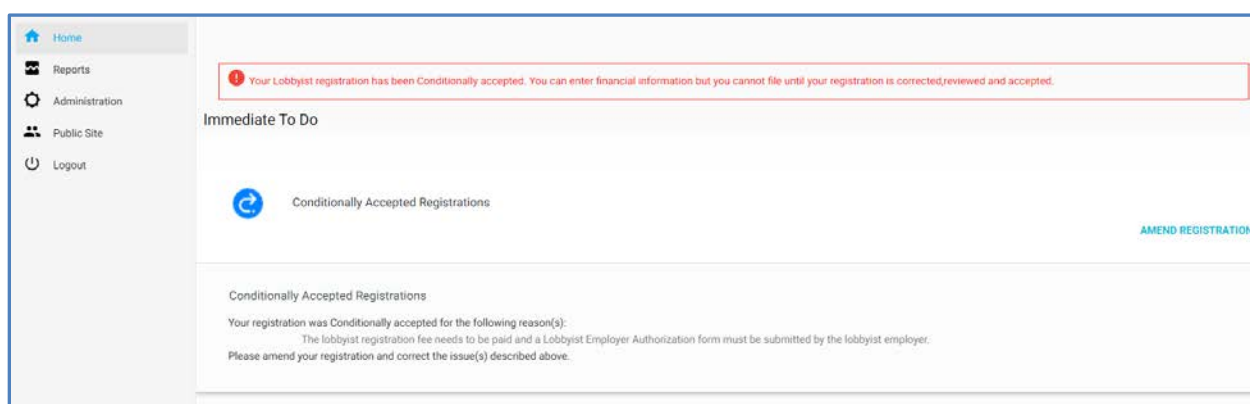


Figure 38. Home Page, Immediate to Do for a Conditionally Accepted Registration

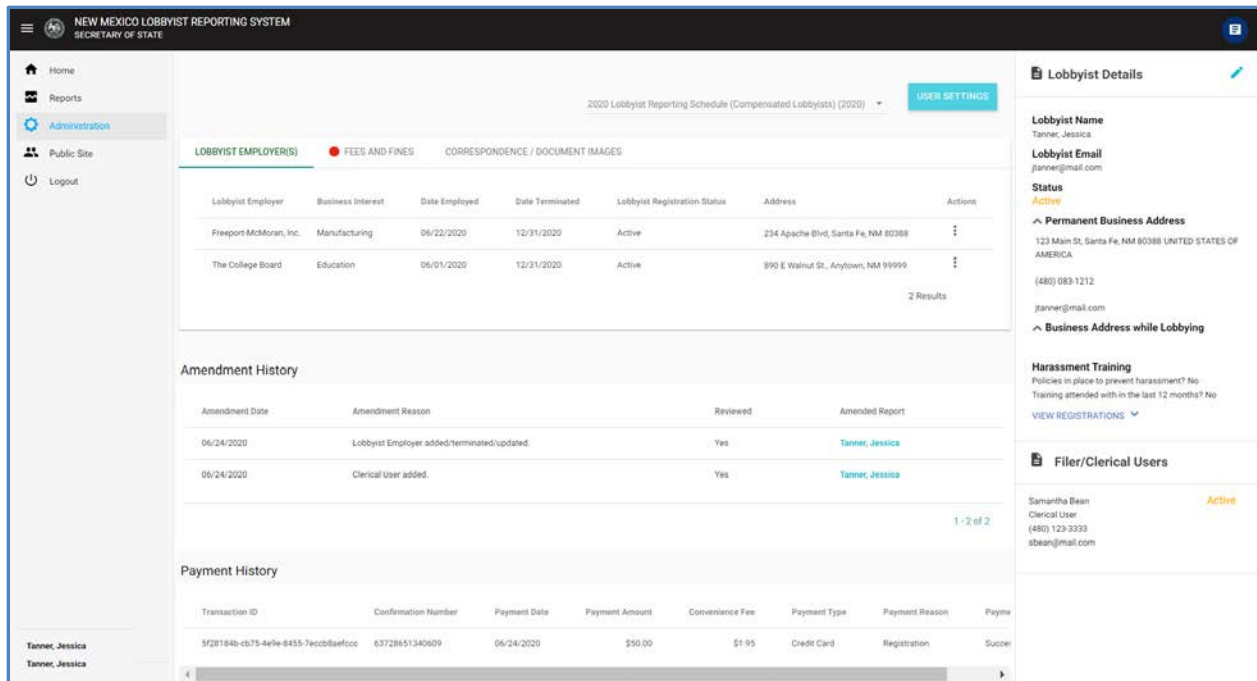


Figure 39. Filer Administration Page for the Lobbyist

6.1.1 Viewing Lobbyist Employers

The Lobbyist Employer tab shows all the lobbyist’s employers for a lobbying year. Employers from different lobbying years can be viewed by selecting the Lobbying Filing Cycle from the dropdown. Only lobbyist employers that have been confirmed will be listed in this tab.

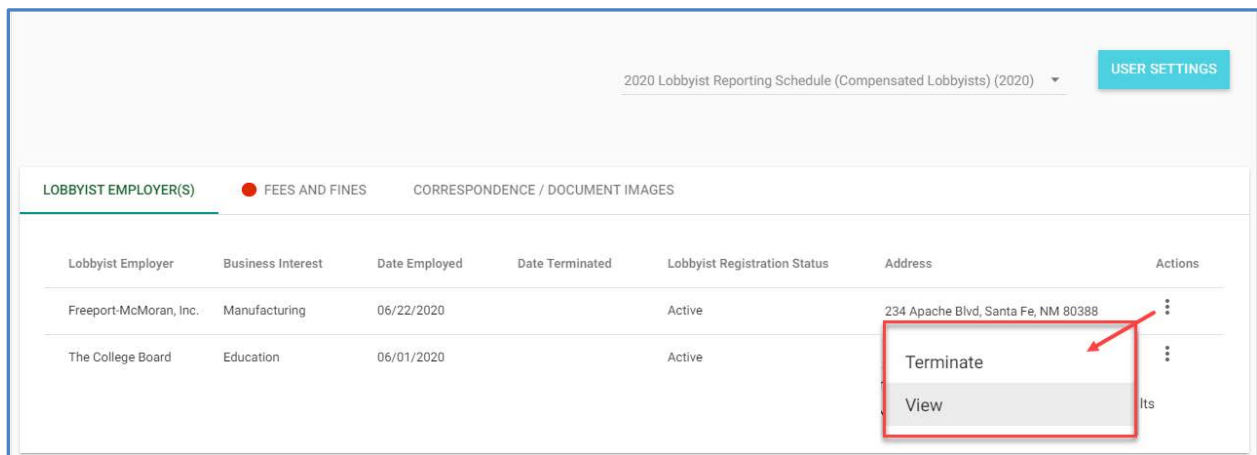


Figure 40. Administration Page – Lobbyist Employer Tab on the Lobbyist Dashboard, Action Menu Visible

To view employment information that was used in creating the Lobbyist Authorization Form, select the employer and click on the action menu. Clicking on View will display the View Lobbyist Employer dialog.

View Lobbyist Employer

Lobbyist Employer Name
Freeport-McMoran, Inc.

Date Employed 6/22/2020

Source of Funds to be Used for Lobbying

Employer Provided 17 / 500

Compensation (Required)

Will the lobbyist receive compensation or a salary for the purpose of lobbying?

☒ Yes ☐ No

Lobbying Efforts

The lobbyist is authorized to lobby in reference to the following:
Authorized to lobby in reference to the manufacturing industry. 64 / 500

Figure 41. View Lobbyist Employer Dialog

6.1.2 Terminating Employment

A lobbyist can terminate employment from the Lobbyist Employer tab.



- Simply select the lobbyist employer and click on the action menu. Selecting Terminate will display the Terminate Lobbyist Employment dialog.
- Enter a Termination Date.
- After reading the acknowledgement, check the acknowledgement checkbox. Type your name in the electronic signature. Once all required information is entered, the Save button is enabled.
- Click  to terminate the employment.
 - The Terminate Lobbyist Employer dialog is closed.
 - The Lobbyist Termination form is generated and saved to the Correspondence / Document Images tab.
 - In the Lobbyist Employer's dashboard, the lobbyist will have a termination date.

Figure 42. Terminate Lobbyist Employment Dialog

The Fees and Fines tab shows a list of fees or fines that have been assessed against the lobbying entity. The Total Outstanding Balance is the sum of all outstanding fees and/or fines. A red dot will be visible adjacent to the Fees and Fines tab if there are outstanding fees or fines.

The system creates an Immediate To Do when a fee or fine is assessed. The Immediate To Do reminds the filer to pay the outstanding fee or fine. Clicking on the ***[VIEW FEES AND FINES](#)*** action link of the Immediate To Do will redirect you to the Fees and Fines Tab.

Immediate To Do



Pay Fee: Lobbyist Registration Fee

Due: Now

VIEW FEES AND FINES

Pay Fee: Lobbyist Registration Fee

You have been assessed a Lobbyist Registration Fee of \$50.00 for Registration Fee for The College Board. This fee is due now. Please verify the details below and pay your fee when ready.

Fee Type:	Lobbyist Registration Fee	Filing:	2020 Registration
Due:	06/26/2020	Filed:	06/24/2020
Fee Created:	06/24/2020	Fee Due:	06/24/2020
Original Amount:	\$50.00	Current Balance:	\$50.00

Figure 43. Immediate To Do Created for an Outstanding Fee

From this tab, you can make payments towards any fee or fine. You can combine payments towards multiple fees or fines or you can make partial payments. Any payments made towards fees or fines will be visible on the Fees and Fines Tab as a child record of the corresponding fee or fine.

LOBBYIST EMPLOYER(S)

FEES AND FINES

CORRESPONDENCE / DOCUMENT IMAGES

Outstanding

PAY FEES OR FINES

Date	Status	Description	Original Amount	Balance	Arbitration
06/24/2020	Outstanding	2020 Third Lobbyist Expenditure Report due 10/07/2020 Late Filing Fine	\$250.00	\$250.00	<input type="checkbox"/>
Total Outstanding Balance				\$250.00	

Figure 44. Fees and Fines Tab

6.1.4 Making a Payment

To make a payment, click on the **PAY FEES OR FINES** button. The Payment dialog will be displayed. At the top of the screen, a list of all open fees and/or fines will be displayed. You have the option of selecting one fine to pay, multiple fines to pay, or a partial fine to pay.

- To pay for just one fine – select only one fine by clicking on one check box.
- To pay for more than one fine – select multiple fines by clicking on multiple check boxes.
- To pay for only a portion of a fine – select only one fine by clicking on one checkbox.

- Click on the action menu next to that fine and select Update Amount. The partial payment panel will display containing information about the fine. Update the Amount to Pay field with a partial payment amount. The Balance After Payment will be calculated.
- Click on **UPDATE** to save the partial payment. The payment has not been processed at this point. The Total field reflects the total amount of the payment to be made. If you have selected multiple fines, this amount will display the sum of fees and fines to be paid.

The screenshot shows a web application window titled "Add Payment". Inside, there's a section labeled "Fees" which contains a table of fees. The first fee is a "Late Filing Fine" dated "06/24/2020" with an "Original Amount" of "\$250.00". Below this, it shows the "Outstanding Balance" as "\$250.00" and the "Amount To Pay" as "\$250.00". To the right of the table is a red-bordered box containing an "Update Amount" button, with a red arrow pointing to it. Below the table, there's a "Total \$250.00" label. At the bottom of the "Fees" section, there's a "Late Filing Fine" label and a "2020 Third Lobbyist Expenditure Report Late Filing Fine" label. Below these labels, there's a form with fields for "Outstanding Balance:" (\$250.00), "Amount to Pay:" (\$200.00), and "Balance after Payment:" (\$50.00). At the bottom right of this form are "CANCEL" and "UPDATE" buttons. At the very bottom of the dialog are "CANCEL" and "PAY SELECTED FEES" buttons.

Fees	Original Amount	Outstanding Balance	Amount To Pay
<input checked="" type="checkbox"/> Late Filing Fine 2020 Third Lobbyist Expenditure Report Late Filing Fine	\$250.00	\$250.00	\$250.00

Total \$250.00

Outstanding Balance: \$250.00

Amount to Pay: \$200.00

Balance after Payment: \$50.00

CANCEL UPDATE

CANCEL PAY SELECTED FEES

Figure 45. Payment Dialog with Partial Payment Panel Displayed

- Once a selection has been made, click on **PAY SELECTED FEES** button. You will be given the option of paying with an e-check or a credit card.
 - Selecting E-Check will display the E-Check processing dialog.
 - Selecting credit card will display the credit card payment processing site.
- Once you have completed the payment with the payment processor, you will be returned to the Payment dialog where the transaction will finish processing.
 - A receipt will be displayed and saved in your Correspondence / Document Images tab.

- The Immediate To Do for the outstanding fee or fine will no longer be visible.
- If all current reports have been filed and the outstanding fees and fines balance is zero, then the public site will show the lobbying entity as Compliant.

6.1.5 Payment Plans

In certain situations, the Bureau of Elections and Ethics Division has set up a payment plan to assist in paying off a fine. If you have a payment plan, the payment must be made on or before the payment plan installment due date.

To View a Payment Plan for an individual fine, select the fine from the Fees and Fines tab and click **View Payment Plan** from the action menu. The View Payment Plan dialog will be displayed showing a list of all installment payments and if paid, their payment dates.

View Payment Plan

SUMMARY OF PAYMENT PLAN:

Fine: Late Filing Fine

Fine Assessed: \$500.00

Creation Date: 03/10/2020

Payment Plan Expiration Date: 01/01/2021

Installment	Amount	Due Date	Payment Date
Payment 1	\$50.00	04/01/2020	03/10/2020
Payment 2	\$50.00	05/01/2020	03/10/2020
Payment 3	\$50.00	06/01/2020	03/10/2020
Payment 4	\$50.00	07/01/2020	03/10/2020
Payment 5	\$50.00	08/03/2020	03/10/2020
Payment 6	\$50.00	09/01/2020	
Payment 7	\$50.00	10/01/2020	
Payment 8	\$50.00	11/02/2020	
Payment 9	\$50.00	12/01/2020	
Payment 10	\$50.00	01/01/2021	

Rows per page: 10 1 - 10 of 12

You may pay your balance in full at any time.

OUTSTANDING BALANCE: \$250.00

Figure 46. View Payment Plan Dialog

To Make a Payment using a Payment Plan:

- Click on the **PAY FEES OR FINES** button. The Payment Dialog is displayed.
- Select the fine associated to a payment plan.
 - You will see a message stating that the fine is associated to a payment plan.
 - The payment plan payments will be displayed on the screen. Each installment lists a due date.
 - Previously made payments will have a date in the Paid Date field.
- Select one or more payment plan payments.
 - If you select more than one payment, the total will display the combined total.
- Click on the **PAY SELECTED FEES** button. You will be given the option of paying with an e-check or a credit card.
- Once you make the payment,
 - A receipt will be displayed and saved in your Correspondence / Document Images Tab.
 - A Payment Plan Balance Letter will be saved in your Correspondence / Document Images Tab.
 - A reporting entity is not considered compliant until the entire fine is paid off.

Payment

Fees

<input checked="" type="checkbox"/>	Late Filing Fine	06/10/2020	Original Amount	\$150.00
	Late Filing Fine - Fourth Primary Report - 06-08-2020		Outstanding Balance	\$137.50
			Amount To Pay	\$137.50

Total \$12.50

There is a payment plan in place for the selected fine. Please check which payment period(s) you are applying your payment to.

	Amount	Due Date	Paid Date
Payment 1	\$12.50	07/01/2020	06/18/2020
<input checked="" type="checkbox"/> Payment 2	\$12.50	08/03/2020	
<input type="checkbox"/> Payment 3	\$12.50	09/01/2020	
<input type="checkbox"/> Payment 4	\$12.50	10/01/2020	
<input type="checkbox"/> Payment 5	\$12.50	11/02/2020	
<input type="checkbox"/> Payment 6	\$12.50	12/01/2020	
<input type="checkbox"/> Payment 7	\$12.50	01/01/2021	
<input type="checkbox"/> Payment 8	\$12.50	02/01/2021	
<input type="checkbox"/> Payment 9	\$12.50	03/01/2021	
<input type="checkbox"/> Payment 10	\$12.50	04/01/2021	
<input type="checkbox"/> Payment 11	\$12.50	05/03/2021	
<input type="checkbox"/> Payment 12	\$12.50	06/01/2021	

12 results

CANCEL
PAY SELECTED FEES

Figure 47. Payment Dialog with Payment Plan Information

Brooks, Brock

Not Compliant
Payment Plan in Place


Type Lobbyist	Address 45 second Albuquerque, NM, 18888 USA	Email bb@24.com	Registration Year 2020
Status Active	Address While Lobbying	Phone Number (888) 888-8888	

SUMMARY
EMPLOYERS
FILINGS
FINES
DOCUMENTS

Election Cycle
2020

Figure 48. Public Site View Details showing Compliance Status

6.1.6 E-Check Payments

- To pay with an e-check, first select the payor type. Is an individual or an organization making the payment?
- Enter payor information and billing information.
- Specify if the e-check is coming from a checking or savings account.
- Enter bank information including account number and routing number.
- Click  .
- A receipt will be generated and stored in your Correspondence / Document Images tab. You will be returned to the Payment dialog where the payment will finish processing.

E-Check Payment

When you provide a check as payment to the Secretary of State, you authorize the State of New Mexico to either use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction.

Payment Amount: \$150

Payor Type

Billing Address (Address that your financial institution has on file)
 Country
 UNITED STATES OF AMERICA

Street Address
 Apartment, Building, Suite, Etc.

City
 State
 NM
 Zip Code

Country Code
 +1
 Phone

Account Information

Bank Account Type
 Bank Name
 Check Number
 Bank Account Number
 Re-enter Bank Account Number
 Routing Number

CANCEL

PAY USING E-CHECK

Figure 49. E-Check Payment Dialog

6.1.7 Credit Card Payments

- To pay with a credit card, enter Billing Information. You will notice that the payment amount listed includes the convenience fee.

- Once you have verified the payment amount, click Next.
- Enter Payment Details. Clicking on Cancel Order will return you to the Declare Payment dialog.
- Click on Next. You will be given a final opportunity to review the payment information before submittal.
- Click on the Pay button to submit the payment.
- A receipt will be emailed from the credit card vendor. A receipt will also be generated and stored in the Correspondence / Document Images tab.

Figure 50. Credit Card Payment Dialog and Payment Details Panel

Note: There is a convenience fee that will be added to all credit card payments.

6.1.8 Viewing Payment History

All payments that you make will be visible in the Payment History grid.

Payment History							
Transaction ID	Confirmation Number	Payment Date	Payment Amount	Convenience Fee	Payment Type	Payment Reason	Payment Status
5f28184b-cb75-4e9e-8455-7ecb8aefccc	63728651340609	06/24/2020	\$50.00	\$1.95	Credit Card	Registration	Successful
2b2a4cc5-bd66-4ad0-b599-8d81f7c110ba	63728827902045	06/26/2020	\$50.00	\$1.95	Credit Card	Registration	Successful

Figure 51. Payment History Grid in the Administration Page

6.2 Viewing Correspondence and Document Images

The Correspondence / Document Images tab shows a list of any correspondence or documents that have been uploaded to your account by the administrators, including filings that were submitted on paper and scanned. Correspondence includes any auto-imaged generated letters (for example - the registration confirmation letter) and any correspondence sent to you through the Declare product.

Note: Only the staff of the Bureau of Elections and Ethics Division can upload correspondence to your account.

If there are multiple clerical users or officers associated to one reporting entity, the correspondence may go to multiple individuals. Each recipient's version will be stored in their respective Correspondence / Document Images Tab.

For Paper Correspondence, if a letter has been returned by the United States Postal Service to the Bureau of Elections and Ethics Division as undeliverable, the administrative staff will mark the mailed correspondence as undelivered. If you see an Undelivered tag, submit a registration amendment to update your address, so future correspondence can be delivered. You can view the undelivered correspondence by clicking on the correspondence hyperlink.

- Click the correspondence / document image hyperlink to view the correspondence or document image.

SUMMARY					
FEEES AND FINES					
CORRESPONDENCE/DOCUMENT IMAGES					
2020 General Election - Candidate Election Cycle					
CORRESPONDENCE/DOCUMENT IMAGES					
Document Type					
Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
Fourth Primary Report	Auto-Imaged Correspondence	06/17/2020	Private		
Notice of Final Action - Steve Austin	Ad Hoc Correspondence	06/16/2020	Private	Undelivered 06/17/2020	
24-Hour Report of Contributions	Auto-Imaged Correspondence	06/16/2020	Private		
Third Primary Report	Auto-Imaged Correspondence	06/16/2020	Private		
Payment Receipt	Payment Receipt	06/14/2020	Private		
Second Primary Report	Auto-Imaged Correspondence	06/03/2020	Private		
Credentials Email - Steve Austin	Auto-Imaged Correspondence	05/29/2020	Private		
Candidate Acceptance - Steve Austin	Auto-Imaged Correspondence	05/29/2020	Private		
7 results					

Figure 52. Correspondence / Document Images Tab

6.3 User Login Maintenance

You can change your password and security questions by clicking on one of the options listed.

USER SETTINGS

and selecting

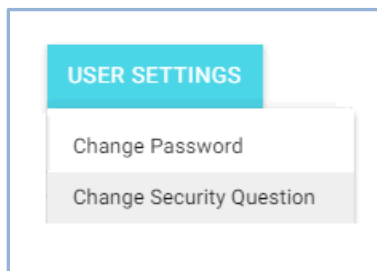


Figure 53. User Settings Menu

6.3.1 Changing Password

You have the ability to change your password by clicking on the Change Password option under User Settings on the Administration screen.

- To change your password, start by entering the current password in the Previous Password field.
- Enter the new password.
- Verify the new password by entering it a second time.
- If the password is valid, the Save button will be enabled. Click **SAVE** to save the new password.

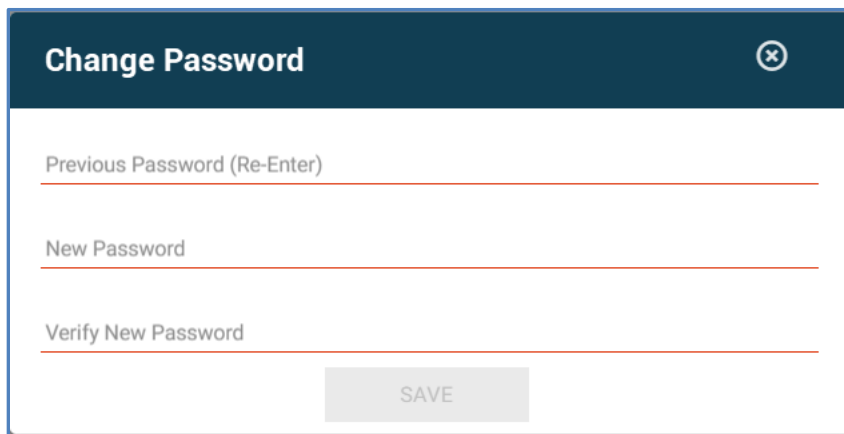
A screenshot of a "Change Password" dialog box. The dialog has a dark blue header with the title "Change Password" and a close button (X). Below the header, there are three input fields: "Previous Password (Re-Enter)", "New Password", and "Verify New Password". At the bottom right of the dialog, there is a "SAVE" button.

Figure 54. Change Password Dialog

6.3.2 Changing Security Question(s)

You have the ability to change your security question by clicking on the Change Security Question option under User Settings on the Administration screen.

- To change your questions or answers, select the question, enter the answer, and verify by entering the answer again.
- Click **SAVE CHANGES** to save the new question/answer.
- Click the arrows to toggle to any other questions/answers that have been set up.

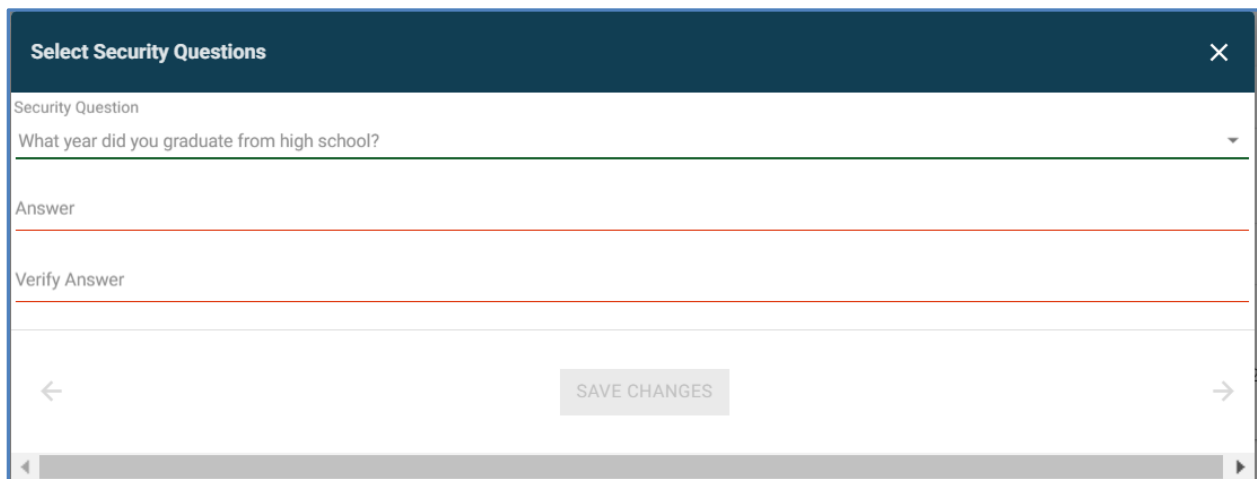



Figure 55. Change Security Question Dialog

6.4 Maintaining Lobbying Entity Registration

Basic information including some registration information is displayed on the right-hand side of the Filer Dashboard on the Administration page. You can customize your dashboard by displaying or hiding this basic information.

- Click the  icon located in the top right corner to hide/display the panels on the right side of the Filer Dashboard.

6.4.1 Viewing Lobbying Entity Details

The Filer Details panel shows general information about the lobbying entity's registration.

To view the PDF of the registration form, click the *View Registration* action link. If the registration has been amended, instead of View Registration you will see a *View Registrations* action link. This will list all versions of the registration, including the registration date and any registration amendment dates. Click on any of the dates to view that version of the registration form.

Lobbyist Details

Lobbyist Name

Tanner, Jessica

Lobbyist Email

jtanner@mail.com

Status

Active

^ Permanent Business Address

123 Main St, Santa Fe, NM 80388 UNITED STATES OF AMERICA

(480) 083-1212

jtanner@mail.com

^ Business Address while Lobbying

Harassment Training

Policies in place to prevent harassment? No
Training attended with in the last 12 months? No

[VIEW REGISTRATIONS](#)

Figure 56. Filer Details for a Lobbyist

Lobbyist Employer Details

Lobbyist Employer Name

New Mexico Thrives

Status

Active

^ Permanent Business Address

P.O. Box 27489, Santa Fe, NM 87505 UNITED STATES OF AMERICA

(480) 083-3333

NMT@mail.com



^ Business Address while Lobbying

Business Interest

Social services

[VIEW REGISTRATION](#)


Figure 57. Filer Details for a Lobbyist Employer



Lobbying Advertising Campaign


Administrator of Advertising Campaign
 SAVE THE WHALES LAC

Status
Active

Contact Information
 (480) 083-3333
 Whales@mail.com



 **Business Address**
 456 Don Gaspar Ave, Santa Fe, NM 87505 UNITED STATES OF AMERICA

 **Mailing Address**

Person Completing Registration
 Jonah Meyers
 (480) 308-1212
 jmeyers065@mail.com

[VIEW REGISTRATION](#)

Figure 58. Filer Details for Lobbying Advertising Campaign


Lobbyist Designation Form Filer


Official Name
 Gallegos, Michael Kyle

Office or Position
 DOH Secretary

Status
Inactive

Business Address
 20 Main, TAOS, NM 87571

Phone
 (888) 888-8888

Email
 mg@mail.com




[VIEW REGISTRATIONS](#) 

Figure 59. Filer Details for Lobbyist Designation Form Filer

6.4.2 Amending Your Registration

- To amend your registration, click the pencil  icon at the top of the filer details panel. The Amend Registration screen will be displayed populated with registration information. Note that not all information is editable. Make the necessary changes.
- Click  to save the changes and amend the registration. These changes will be reflected on your Registration Form. Once submitted and accepted by the Bureau of Elections and Ethics Division, the new registration form is visible in both your Filer Dashboard and on the public site.

Note: If you do not see the pencil icon in the Filer Details panel, then you have previously submitted a registration amendment and are waiting for the Bureau of Elections and Ethics Division to accept the registration amendment. You can see all registration amendments submitted and their respective status in the Amendment History grid.

6.4.3 Viewing Registration Amendment History

Each registration amendment must be submitted to the Bureau of Elections and Ethics Division. When you submit a registration amendment, they will be visible in the Amendment History grid. Once the Bureau of Elections and Ethics Division reviews and accepts your registration amendment, those changes will be visible in your dashboard. A reviewed status of No indicates that the amendment has not yet been accepted by the Bureau of Elections and Ethics Division. Clicking on the hyperlink that contains your name will display the registration amendment that was submitted.

Amendment History			
Amendment Date	Amendment Reason	Reviewed	Amended Report
05/01/2020	Lobbyist Employer added/terminated/updated.	Yes	Tanner, Jessica
04/15/2020	Clerical User added.	Yes	Tanner, Jessica

1 - 2 of 2

Figure 60. Amendment History Grid

6.4.4 Viewing of Officers/Clerical Users

Any individual who has access to the filer's dashboard will be listed in this section. Both officers and clerical users will be displayed. Officer information must be updated through a registration amendment. This panel will be blank if there are no clerical users on a lobbyist dashboard.

Note: Any changes to officer information must be submitted through a registration amendment.






Filer/Clerical Users	
David Jenkins Custodian (480) 083-1212 djenkins@mail.com	Active 
Julie Sparks Clerical User (480) 083-3333 jsparks@mail.com	Active 
Bob Thompson Authorizing Officer (480) 083-3333 NMT@mail.com	Active 

Figure 61. Filer / Clerical User Information Panel

To update information about a Clerical User:

- Click the  icon next to the Clerical User's name. The Officer Detail dialog is displayed.
- Update necessary information.
 - Edit contact information
 - Set status from active to inactive. Enter inactivation date. An inactive Clerical User will no longer have access to the Filer Dashboard or any functionality pertaining to this reporting entity.
- Click  to update the Clerical User's information.

Update Officers

Name

Cooper, Tiffany

Title

Authorized Agent

Phone Number

(222) 333-4445

Email Address

tcooper@mail.com

Status

☐ Active
 ☒ Inactive

Removal Date

CANCEL

SAVE

Figure 62. Update Officers Dialog

6.4.5 Renewing Your Registration

6.4.5.1 Do You Qualify for Renewal?

Lobbyists are the only lobbying entity that must renew for the upcoming lobbying year.

When can a lobbyist renew?

- As soon as **REGISTRATION RENEWAL** is visible on the Administration page in the filer dashboard.

What makes a lobbyist eligible to renew?

- No late unfiled reports
- Current report being filed is not late
- No unpaid fees or fines

An Immediate to Do is created when the renewal window opens for the lobbyist and the lobbyist is eligible to renew. You can begin the renewal process by clicking on the Registration Renewal button or clicking on the **Registration Renewal** action link within the Immediate To Do.

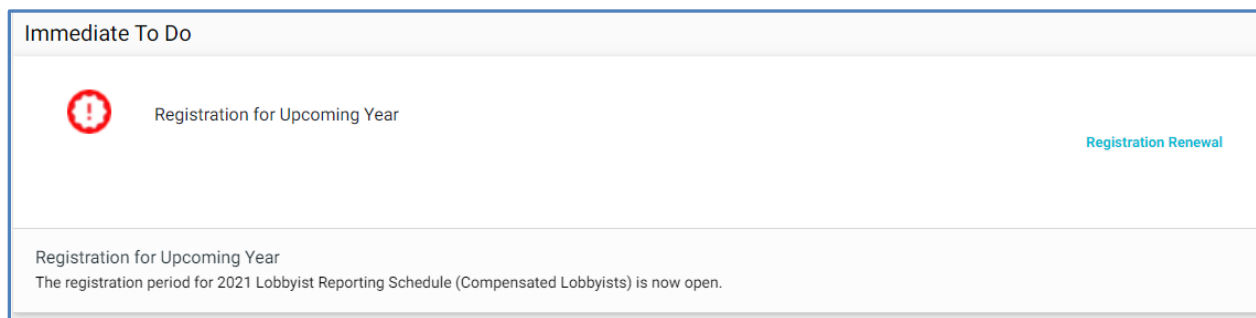


Figure 63. Immediate To Do – Registration for Upcoming Year

6.4.5.2 To renew for the upcoming lobbying year:

- Click **REGISTRATION RENEWAL**. The Lobbyist Information Renewal screen will be displayed.
 - Your current year's registration information will populate the renewal screen.
 - Update lobbyist contact information, if necessary.
- For employer information, you have options to continue employment or discontinue employment with each employer for the upcoming registration year. Each existing employer must be addressed.
 - Continue employment with a current employer.
 - Select the employer from the Lobbyist Employer Information grid.

- From the action menu, select **Renew Employment**. The Edit Lobbyist Employer dialog is displayed populated with current employer information. It cannot be edited because your original lobbyist authorization form will be used. Any changes to these fields will need to be submitted by the employer.
 - Select if you will be paying for the lobbyist registration fee. See [Making a Payment](#).
 - Click **SAVE** to mark this employer as continued for the upcoming year. Employer will be visible on the Lobbyist Employer Information grid on the renewal screen. The registration fee will be calculated based on your selection of fee payment.
- Do not continue employment with a current employer for the upcoming lobbying year.
 - Select the employer from the Lobbyist Employer Information grid.
 - From the action menu, select **Do Not Renew Employment**. Once you confirm the selection, the employer will be removed from the Lobbyist Employer Information grid. This employer will not continue into the upcoming lobbying year, however, this employer relationship will remain valid until the end of the current lobbying year or until the relationship is terminated by the lobbyist or the employer. The registration fee will be calculated based on your actions.
 - Add a new employer.
 - Adding a new employer follows the same process used during registration. See [Lobbyist Registration](#).

Lobbyist Employer Information ? **+ ADD EMPLOYER**

For each employer, you must select from the action menu to either renew employment or to not renew employment.

Employer	Address	Phone	Date Employed	Expenditures & Contributions	Compensated	You will Pay Registration Fee	Actions
New Mexico Thrives	P.O. Box 27489, Santa Fe, NM 87505	(480) 083-3333	06/01/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	⋮ Renew Employment Do Not Renew Employment

Total Registration Fee Owed: \$50.00 Registration Fee to be Paid: \$0.00

Figure 64. Lobbyist Employer Information Panel on the Registration Renewal Screen

- Verify that the Total Registration Fee Owed and the Registration Fee to be Paid are what you expected.
- Enter Harassment Training information.
- If necessary, add any Clerical Users. This follows the same process used during registration. See [Lobbyist Registration](#).
- After reading the acknowledgement, check the acknowledgement box and type your name as the electronic signature. The date will default to the current date and cannot be edited.

- When you have entered all required registration information, the UPDATE button will be enabled. Ensure all information is correct.
- Click **UPDATE** to submit your registration renewal. A confirmation message is displayed. If you have added any employers or continued employment on the Lobbyist registration, then you will be given the opportunity to pay the lobbyist registration fees. See [Making a Payment](#).
 - Once you have completed the renewal process, you will be returned to the Administration page.
 - In the Lobbyist Details panel, your status will be **Active (Pending Renewal)**
 - A renewal will not be visible in the Amendment History grid, however, you can see the Renewal Registration Form in the Lobbyist Details Panel by clicking on the **View Registrations** action link (once it has been accepted by the Bureau of Elections and Ethics Division).
 - On the administration page, you will see both your current lobbying filing cycle and the upcoming lobbying filing cycle.
 - On the Administration Page, for the lobbyist employer, you can view the current year's employers and the upcoming year's employers by switching the filing cycle in the dropdown. Any newly added employers will not be visible until the lobbyist employer submits the Lobbyist Authorization Form and both the registration renewal and the Lobbyist Authorization Form has been accepted by the Bureau of Elections and Ethics Division.

Figure 65. Edit Lobbyist Employer dialog launched from the Lobbyist Renewal Screen

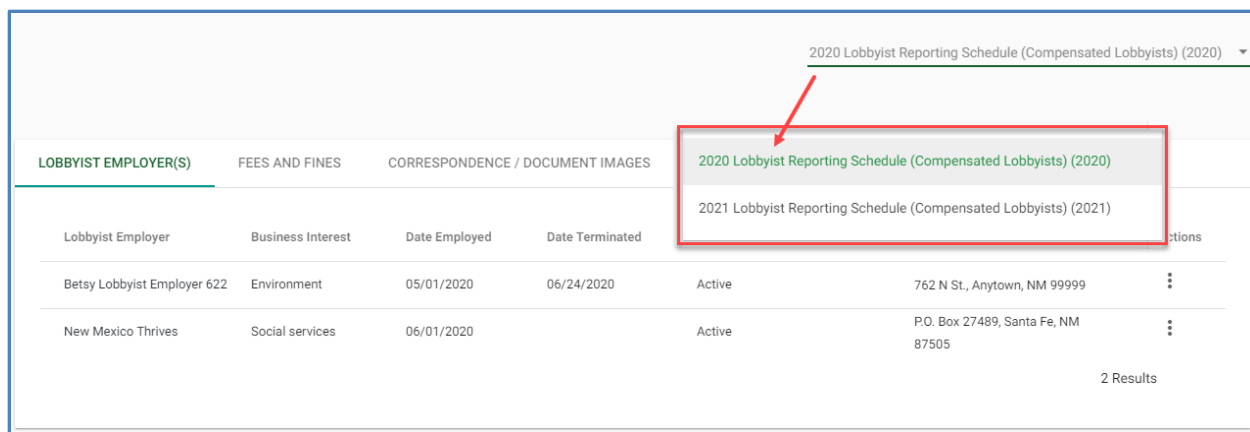


Figure 66. Lobbyist Filer Dashboard, Administration Page, Filing Cycle Drop Down displaying Current filing cycle and upcoming filing cycle

6.4.5.3 What if I don't plan to continue lobbying in the upcoming year?

If you do not plan to continue lobbying in the upcoming year, you do not need to renew. At some point in early January, the Declare system will mark the registration status as inactive. You are still able to log into the Lobbyist Reporting System. You will still need to file all reports covering the time period that you were registered. You will not be assigned any additional lobbying reports.

6.4.5.4 What if I plan to continue lobbying in the upcoming year?

If you plan to continue lobbying in the upcoming year, you will need to renew. Based on when you renew, your current registration status may be active or inactive. This will not affect your ability to renew. See [Renewing Registration](#).

6.5 Lobbyist Employer Administration

The Lobbyist Employer Administration page is very similar to the [Lobbyist Administration](#) page. Filer details can be viewed on the Lobbyist Employer Details panel. Also, any individual who has access to the Lobbyist Employer dashboard, will be listed on the Filer / Clerical Users panel. A key difference is the Lobbyists Tab.

6.5.1 Viewing Lobbyists



The Lobbyist tab displays all the lobbyists that are currently working for the lobbyist employer. Lobbyists from different lobbying years can also be viewed by selecting the Lobbying Filing Cycle from the dropdown. Only lobbyists that have been confirmed will be listed in this tab.

LOBBYISTS FEES AND FINES CORRESPONDENCE / DOCUMENT IMAGES						
Lobbyist	Date Employed	Date Terminated	Lobbyist Registration Status	Address	Email	Phone
James, Lucy	06/01/2020		Active	20 Main, TAOS, NM 87571	lucyj@mail.com	(999) 999-9999
Jenkins , Tom	05/01/2020		Active	456 Don Gaspar Ave, Santa Fe, NM 87505	tjenkins061@mail.com	(480) 083-3333
Riggs, Karen	06/01/2020		Active	450 E. Riggs St., Anytown, NM 99999	kriggs@test.com	(444) 333-3333
Crawford, Chase	05/01/2020		Active	780 N Crawford St., Anytown, NM 99999	ccrawford@test.com	(222) 333-4444
Price , Jamie	05/01/2020		Active	123 Main St, Santa Fe, NM 80388	jprice061@mail.com	(480) 123-3333
5 Results						

Figure 67. Lobbyist Employer Administration page, Lobbyists Tab

6.5.2 Adding a Lobbyist after Initial Registration

The lobbyist employer is able to add a lobbyist for employment purposes. This adding of a lobbyist must be submitted through a lobbyist employment registration amendment.

- Clicking the  in the Lobbyist Employer Filer Details panel will begin the amendment process. See [Amending Your Registration](#).
- Click  to add the lobbyist. You will follow the same process used during initial registration. See [Adding a Lobbyist](#). If lobbyist registration fees are now due, the calculated fee will be visible on the registration screen and you will have an opportunity to pay.
- Once you have submitted the registration amendment and the Bureau of Elections and Ethics Division has accepted the amendment, the lobbyist employment will be confirmed, and the lobbyist will be visible on the Lobbyist tab in the Lobbyist Employer Filer Dashboard. The lobbyist will also be able to see a new employer in their Lobbyist Filer dashboard, Employer tab.
- A new Lobbyist Authorization Form will be generated. You can view the Lobbyist Authorization Form by clicking on the Lobbyist name in your Lobbyist Tab or by clicking on View Registration action link in your Filer Details Panel. Clicking on the **VIEW REGISTRATIONS** action link will display a PDF that contains the Employer Information Form and a Lobbyist Authorization Form for each lobbyist hired by the employer.

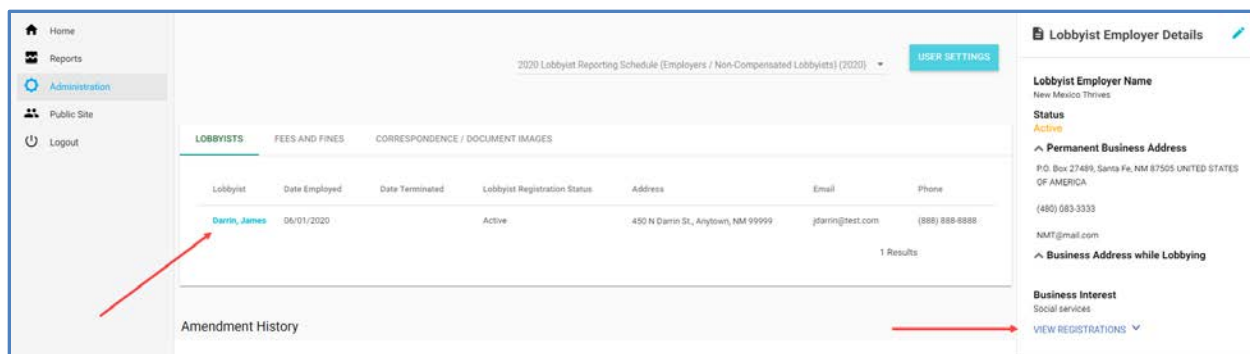





Figure 68. Lobbyist Employer Dashboard, Administration Page, Lobbyist Tab

6.5.3 Terminating a Lobbyist

The lobbyist employer is able to terminate employment with a lobbyist. This lobbyist termination must be submitted through a lobbyist employment registration amendment.

- Clicking the  in the Lobbyist Employer Filer Details panel will begin the amendment process. See [Amending Your Registration](#).
- Select the lobbyist from the Lobbyist Information grid and click on the action menu. Selecting Terminate will display the Terminate Lobbyist Employment dialog.
- Enter a Termination Date.
- After reading the acknowledgement, check the acknowledgement checkbox. Type your name in the electronic signature. Once all required information is entered, the Save button is enabled.
- Click  to terminate the employment.
 - The Terminate Lobbyist Employment dialog is closed.
 - Focus is returned to the Lobbyist Employer Amendment screen. In the Lobbyist Information grid, the lobbyist terminated now has a terminated date.
- After reading the acknowledgement for the registration amendment, check the acknowledgement checkbox. Type your name in the electronic signature. Enter your title. Once all required information is entered, the Amend button is enabled.
- Click  to save the changes and amend the registration. These changes will be reflected on your Registration Form. Once submitted and accepted by the Bureau of Elections and Ethics Division, the new registration form is visible in both your Filer Dashboard and on the public site.

- The Lobbyist Termination form is generated for that lobbyist and saved to the Correspondence / Document Images tab in both the lobbyist's and the lobbyist employer's dashboards.
- In the Lobbyist Employer's dashboard, the lobbyist will have a termination date.
- In the Lobbyist's dashboard, the lobbyist employer will have a termination date.

NEW MEXICO LOBBYIST REPORTING SYSTEM
SECRETARY OF STATE

2020 Lobbyist Reporting Schedule (Employers / Non-Compensated Lobbyists) (2020) [USER SETTINGS](#)

LOBBYISTS FEES AND FINES CORRESPONDENCE / DOCUMENT IMAGES

Lobbyist	Date Employed	Date Terminated	Lobbyist Registration Status	Address	Email	Phone
Darrin, James	06/01/2020		Active	450 N Darrin St., Anytown, NM 99999	jdarrin@test.com	(888) 888-8888

1 Results

Amendment History

Amendment Date	Amendment Reason	Reviewed	Amended Report
06/29/2020	Lobbyist added/terminated/updated.	Yes	New Mexico Thieves

1 - 1 of 1

Payment History

Transaction ID	Confirmation Number	Payment Date	Payment Amount	Convenience Fee	Payment Type	Payment Reason	Paym
be75b47d-de1c-4e44-996f-0920caa73831	63729052649341	06/29/2020	\$50.00	\$1.95	Credit Card	Registration	Success

Lobbyist Employer Details

Lobbyist Employer Name
New Mexico Thieves

Status
Active

Permanent Business Address
P.O. Box 27489, Santa Fe, NM 87505 UNITED STATES OF AMERICA
(480) 083-3333
NMT@gmail.com

Business Address while Lobbying

Business Interest
Social services
[VIEW REGISTRATIONS](#)

Filer/Clerical Users

David Jenkins
Custodian
(480) 083-1212
djenkins@mail.com **Active**

Julie Sparks
Clerical User
(480) 083-3333
jsparks@mail.com **Active**

Bob Thompson
Authorizing Officer
(480) 083-3333
NMT@gmail.com **Active**

Sparks, Julie
New Mexico Thieves

Figure 69. Lobbyist Employer Dashboard, Administration Page

Lobbyist Information [+ ADD LOBBYISTS](#)

Lobbyist	Phone	Email	Date Employed	Paid Registration	Date Terminated	Lobbyist Registration Status	You will Pay Registration Fee	Actions
Long, Wes	(222) 333-4444	wlong@test.com	04/27/2020	<input checked="" type="checkbox"/>	06/05/2020	Terminated	<input type="checkbox"/>	⋮
Munoz 063, Matthew	(480) 083-1212	mmunoz@mail.com	05/01/2020	<input checked="" type="checkbox"/>		Active	<input type="checkbox"/>	⋮
Tanner, Jessica	(480) 083-1212	jtanner@mail.com	06/01/2020	<input checked="" type="checkbox"/>		Active	<input type="checkbox"/>	⋮

Total Registration Fee Owed: \$0.00 Registration Fee to be Paid: \$0.00

Figure 70. Lobbyist Employer Registration Screen, Lobbyist Information Panel – Terminate Menu Option Visible

6.6 Lobbying Advertising Campaign Administration

The Lobbying Advertising Campaign Administration page is very similar to the [Lobbyist Administration](#) page. Filer details can be viewed on the Lobbying Advertising Campaign Details panel. Also, any

individual who has access to the Lobbying Advertising Campaign dashboard, will be listed on the Filer / Clerical Users panel. A key difference is the Principal(s) / Organizer(s) tab and the Lobbyist(s) / Employer(s) tab.

6.6.1 Viewing Lobbying Advertising Campaign Members

To view all principal members and organizer members, click on the Principal / Organizer tab.

To view all lobbyist employers and lobbyist members, click on the Lobbyist / Employer tab.

PRINCIPAL(S)/ORGANIZER(S)			
Type	Name	Occupation	Address
Principal	David Decker	Consultant	234 Westward Way, ABQ, NM 80388
Organizer	Julie Spence	Consultant	234 Apache Blvd, Santa Fe, NM 80388

2 Results

Figure 71. Lobbying Advertising Campaign Dashboard, Principal(S) / Organizer (S) Tab

PRINCIPAL(S)/ORGANIZER(S)			
Type	Name	Address	Phone
Lobbyist	Lucy James	20 Main, TADS, NM 87571	(999) 999-9999
Lobbyist	Karen Riggs	450 E. Riggs St., Anytown, NM 99999	(444) 333-3333
Employer	University of New Mexico Lobbyists 063	123 Main St, Santa Fe, NM 83638	(888) 444-7575
Employer	New Mexico Thrives	P.O. Box 27489, Santa Fe, NM 87305	(480) 083-3333

4 Results

Figure 72. Lobbying Advertising Campaign, Administration Page


6.7 Elected or Appointed Officials Lobbyist Designation Form Filer

The Lobbyist Designation Form Filer dashboard contains a single page, the Home page. On the Home page, the Lobbyist Designation Form Filer can view all appointed staff members by filing year. Other

functionality is similar to the [Lobbyist Administration](#) page. Filer details can be viewed on the Lobbyist Designation Form Filer Details panel.



6.7.1 Changing Staff Members for the Current Year

If you need to alter the staff member information for a previously filed Elected or Appointed Officials Lobbyist Designation Form.

- Clicking the  in the Filer Details panel will begin the amendment process. From here, you can change any information entered during registration including staff members. See [Amending Your Registration](#).

6.7.2 Filing the Lobbyist Designation Form for the Upcoming Year

Each year a new Elected or Appointed Officials Lobbyist Designation Form must be filed.

- Click  to display the registration/filing screen populated with the current year's information.
- As necessary, update staff member information.
- Enter your name as the electronic signature. The date will be defaulted to the current date. This field cannot be edited. Once all required information is entered, the Save button is enabled.
- Click  to submit your Lobbyist Designation Form for the upcoming year. A toast message will confirm that the Lobbyist Designation Form has been submitted. You will receive an email stating that the registration amendment has been submitted for the upcoming calendar year, this means that you have filed your Lobbyist Designation Form for the upcoming year.
- An Appointed or Elected Official Lobbyist Designation Form is generated. It is now visible to the public on the New Mexico Campaign Finance System site.

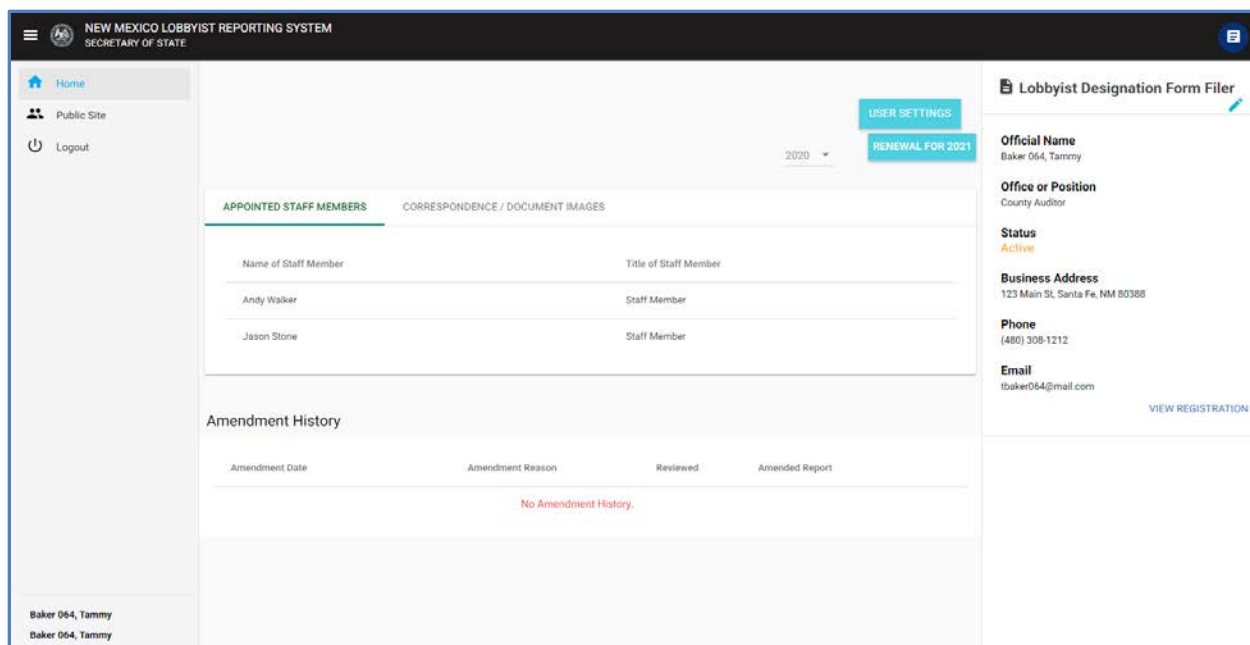


Figure 73. Lobbyist Designation Form Filer Dashboard

7 Public Site for Lobbying Entities

7.1 Overview

The public site is accessible to anyone; no login credentials are needed. On this site, the public user can search for and view information about all registered lobbyists, lobbyist employers, lobbying advertising campaigns, lobbyist designation form filers, view all filed reports, and download the lobbyist index from a lobbyist or employer point of view.

7.1.1 Getting There and Back

If you have login credentials for the system, you may go into the public site and return to your Filer Dashboard, and go back and forth, without continually logging in and out.

- If you are logged in, click *Public Site* on the Dashboard Navigational Menu.
- You will be transferred to the public site.
- In the public site, if you have gone there while being logged into your dashboard, you will see a *Home* link in the Public Site Action Menu. Click this link to be returned to your workspace.
- As long as you stay logged in, you may use these two links to go back and forth.
- Once you log out, you can access the public site anytime, but you cannot get back to your dashboard without logging in again.

7.1.2 Overview Page

The Overview is the public site home page. It contains various widgets which are charts or graphs of general information of interest to the public. Each widget has an arrow that when clicked will transfer the user to an Explore screen with detail about the data in the widget.

Widgets include:

- A bar chart showing the top 10 Earners in the current election
- A wheel graph showing the total active committees in the current year by committee type
- A bar chart showing the top 10 Spenders in the current election

Below the widgets are two sections:

- Exploring Committee Data / Exploring Candidate Data - these sections are shortcuts to the Explore screens for specific committee types or candidates for specific offices.
- Resource Links that will take you to different areas of the Secretary of State website.

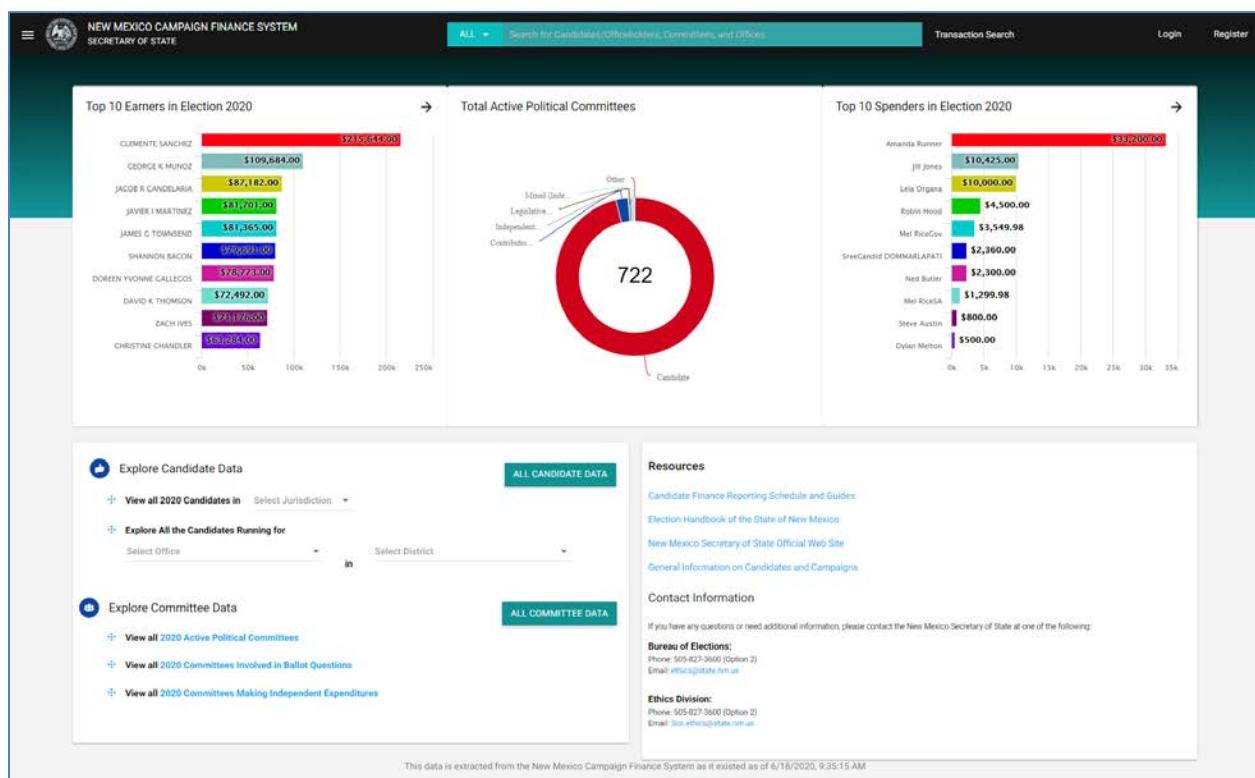


Figure 74. Public Site Home Page for the New Mexico Campaign Finance System

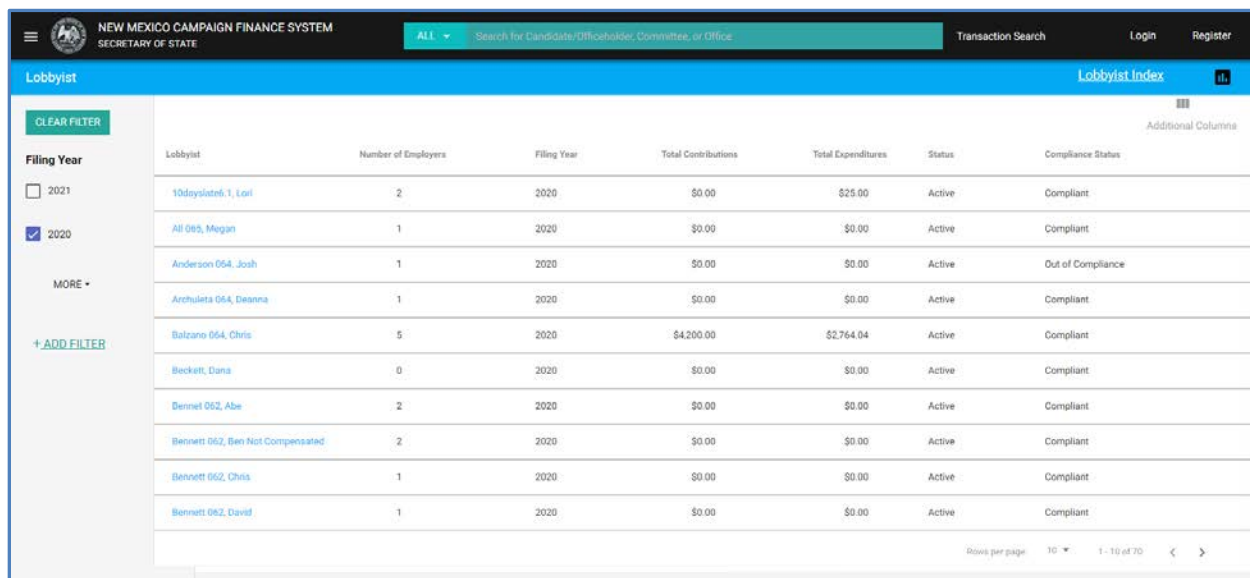
7.1.3 Explores and Searches

The public site provides two basic ways to find and obtain information.

Explores are a way to look at general lists of information such as lobbyists, lobbyist employers, lobbying advertising campaigns, lobbyist designation form filers, reports, and lobbyist expenditures. By using the

available filters, the contents of the lists can be made more specific. Data columns can be added or removed from the lists.

Result sets can be downloaded by clicking on the  icon. Each time you see this icon, clicking on it will download the result set in a .csv format.



Lobbyist	Number of Employers	Filing Year	Total Contributions	Total Expenditures	Status	Compliance Status
10dayslate1, Lori	2	2020	\$0.00	\$25.00	Active	Compliant
All 065, Megan	1	2020	\$0.00	\$0.00	Active	Compliant
Anderson 064, Josh	1	2020	\$0.00	\$0.00	Active	Out of Compliance
Archuleta 064, Deanna	1	2020	\$0.00	\$0.00	Active	Compliant
Balzano 064, Chris	5	2020	\$4,200.00	\$2,764.04	Active	Compliant
Beckert, Dana	0	2020	\$0.00	\$0.00	Active	Compliant
Bennett 062, Abe	2	2020	\$0.00	\$0.00	Active	Compliant
Bennett 062, Ben Not Compensated	2	2020	\$0.00	\$0.00	Active	Compliant
Bennett 062, Chris	1	2020	\$0.00	\$0.00	Active	Compliant
Bennett 062, David	1	2020	\$0.00	\$0.00	Active	Compliant

Figure 75. Example of a Lobbyist Explore on the Public Site

Searches are intended to zero in on specific entities or lobbying transactions, more quickly than you may be able to get there using the Explores. For example, you may be looking for a specific lobbyist or lobbyist employer, or you may be searching for all lobbyist expenditures made by a specific lobbyist. It is faster to get to what you need by doing a specific search rather than using the Explores.

To search using the entity search bar located at the top of the screen:

- You can search across all entities or you can select a specific type of reporting entity.
- Enter the name of the lobbyist, lobbyist employer, or any other entity. As you type in the entity's name, the search results will be narrowed down based on your typing. Quick Results will display the first three matches
- Clicking [SEE ALL RESULTS](#) will display a list of entities who match the entered search criteria. Clicking on a specific entity will take you to the [View Detail](#) screen for that entity.

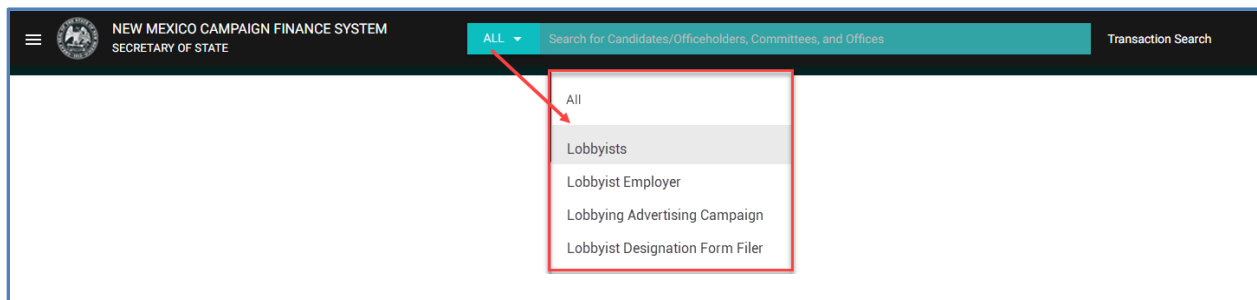


Figure 76. Public Site Home Page – Entity Search and Transaction Search

Note: Entering a % into the search bar will bring back all results.

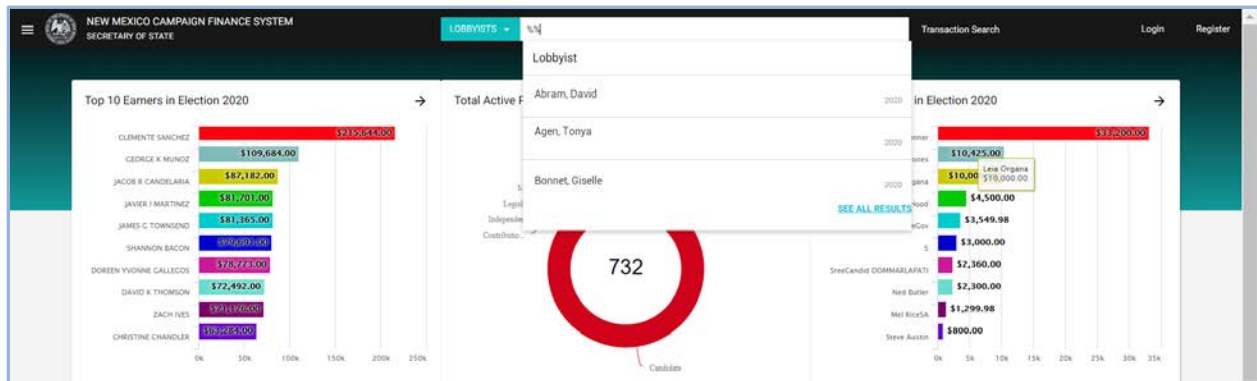


Figure 77. Entity Search Bar with Quick Results

Using the public site, you can search for all reported transactions for a specific lobbying entity type. You can further narrow your search by specifying a specific transaction type, such as lobbyist expenditures, special events, and / or political contributions. You can even further narrow down the search by specifying a specific lobbyist / employer / or advertising campaign. Additional filtering parameters are available.

To search for Lobbying Expenditures:

- From the navigational menu, click on the **Lobbyist Expenditures** menu option. The Expenditure Search dialog will display.
- Enter search criteria and click on the **SEARCH** button.
 - Only filed transactions are searched.
- Transaction Search Results will be displayed.
 - You can further refine the search from the Search Results screen by clicking on **Edit Search**

- Click on the reporting entity name to display the [View Details](#) of the filer.

Expenditure Search

Registration Type

Lobbyist

Expenditure Type

Select Year

☐ 2021
 ☐ 2020

MORE

Amount Over/Under

Over

Enter Amount

Date From

Enter date

Date Through

Enter date

Filer Name

SEARCH

Figure 78. Expenditure Search Dialog on the Public Site

<div> <div>NEW MEXICO CAMPAIGN FINANCE SYSTEM</div> <div>SECRETARY OF STATE</div> <div>ALL</div> <div>Search for Candidates/Officeholders, Committees, and Offices</div> <div>Transaction Search</div> </div>									
Expenditure Search Results									
<div> <div>Search Type: Expenditure</div> <div>Edit Search</div> <div>Additional Columns</div> </div>									
Name	Expenditure Type	Purpose	Year	Amount	Date	Payer/Contributor	On Behalf Of	Bullet Number	Bullet Question/Candidate
Smith, Jane	Expenditure	Lunch during meeting	2020	\$58.26	05/04/2020	Red Robin	Exxon Mobil		
Sneed, Daniel	Expenditure	Pencils to hand out	2020	\$30.55	05/06/2020	Target	New Mexico University		
Edwards, Beth	Political Contributions		2020	\$300.00	05/15/2020		Blackbird Logistics Corporation		Austin, Steve
James, Lucy	Special Events		2020	\$159.50	05/20/2020				Support
1 - 4 of 4									

Figure 79. Transaction Search Results on the Public Site

7.1.4 Viewing Details

In both the Explores and the Searches, each specific entity in the lists can be selected in order for you to view more details.

- Lobbyists include filing cycle summary totals for lobbying transactions, a list of employers, a list of all filed reports (each viewable), a list of any fines assessed and a compliance status, a list of uploaded documents including scanned filings submitted on paper (each viewable), and links to view registration information.
- Lobbyist employers include filing cycle summary totals for lobbying transactions filed by the employer, a list of lobbyists, a list of all filed reports (each viewable), a list of any fines assessed and a compliance status, a list of uploaded documents including scanned filings submitted on paper (each viewable), and links to view registration information.
- Lobbying advertising campaigns include filing cycle summary totals for lobbying transactions, a list of advertising campaign members, a list of all filed reports (each viewable), a list of any fines assessed and a compliance status, a list of uploaded documents including scanned filings submitted on paper (each viewable), and links to view registration information.
- Lobbyist designation form filers include the reason for filing the Appointed or Elected Official Lobbyist Designation Form and a link to view the form and previous versions of the form, if any. Also, a list of any documents that have been uploaded for the filer.
- For lists of reports, the report itself is viewable, or you can view the details about the lobbying entity who filed the statement.

Tanner, Jessica Not Compliant

Type Lobbyist	Address 123 Main St Santa Fe, NM, 80388 USA	Email jtanner@email.com	Registration Year 2020
Status Active	Address While Lobbying	Phone Number (480) 083-1212	Election Cycle 2020

SUMMARY EMPLOYERS FILINGS FINES DOCUMENTS

Combined Financial Totals

Total Political Contributions	Total Expenditures
\$1,500.00	\$2,245.00

Total Expenditure Details

Total Meal and Beverage Expenses	\$0.00
Total Other Entertainment Expenses	\$145.00
Total Other Expenses	\$500.00
Total Special Event Expenses	\$1,600.00

Past Registrations

Figure 80. Example of a Lobbyist View Detail on the Public Site

7.1.5 Downloading the Lobbyist Index

The Lobbyist Index provides a downloadable listing of lobbyists and their employers. The index contains contact information, a picture of the lobbyist (if provided at the time of registration). The file can be downloaded in a lobbyist view or an employer view. Available format is a PDF file or a CSV file.

To see a list of all lobbyists who have employers

- From the navigational menu, select **Explore Lobbyists**.
- Select **Lobbyists**.
- Click the Lobbyist Index action link from the Explore Lobbyist header.
- Select PDF or CSV. The Lobbyist Index is downloaded.



Figure 81. Public Site - Explore Lobbyist, Lobbyist Index Action Link

To see a list of all employers who employ lobbyists

- From the navigational menu, select **Explore Lobbyists**.
- Select **Lobbyist Employers**.
- Click the Lobbyist Index action link from the Explore Lobbyist Employer header.
- Select PDF or CSV. The Lobbyist Index is downloaded.




Figure 82. Public Site – Explore Lobbyist Employer, Lobbyist Index Action Link

7.1.6 Viewing Filed Lobbying Reports

Filed lobbying reports can also be accessed by clicking on the Explore Reports option on the public site navigational menu. Like the other Explores' functionality, there are filters available so that the group of reports shown in the list can be made more specific.

Note: Only filed Lobbying Reports will be visible.

Clicking on the report name will display the filed lobbying report in a pdf format. Clicking on the filer name will allow you to drill down to the View Details screen for the filer where all previously filed lobbying reports can be viewed.

Clicking on the  will allow you to customize the information displayed in your result set. Certain columns can be hidden or displayed based on your data needs.

Lobbyist Reports								
<div> <div>CLEAR FILTER</div> <div> <div>Reporting Dates</div> <div> <div>06/30/2019</div> <div>through</div> <div>06/30/2020</div> </div> </div> <div> <div>Registration Type</div> <div> <input type="checkbox"/> Lobbyist <input type="checkbox"/> Lobbyist Employer <input type="checkbox"/> Lobbying Advertising Campaign </div> </div> <div>+ ADD FILTER</div> </div>								
Report Name	Start of Period	End of Period	Due Date	Submitted Date	Report Status	File Name	Registration Type	
2020 Third Lobbyist Expenditure Report (May - October)	05/05/2020	10/05/2020	10/07/2020	10/06/2020	Filed	Bonnet, Abe	Lobbyist	
2020 Third Lobbyist Expenditure Report (May - October)	05/05/2020	10/05/2020	10/07/2020	10/07/2020	Filed	James, Keith	Lobbyist	
2020 Second Lobbyist Expenditure Report (January - May)	01/01/2020	05/04/2020	05/06/2020	05/06/2020	Filed	Hodkins, Daniel	Lobbyist	
2020 Second Lobbyist Expenditure Report (January - May)	01/01/2020	05/04/2020	05/06/2020	05/09/2020	Filed	Mayor, Seth	Lobbyist	
2020 Third Lobbyist Expenditure Report (May - October)	05/05/2020	10/05/2020	10/07/2020	10/06/2020	Filed	Dillings, Macy	Lobbyist	
2020 Third Lobbyist Expenditure Report (May - October)	05/05/2020	10/05/2020	10/07/2020	10/07/2020	Filed	Long, Wes	Lobbyist	
2020 Second Lobbyist Expenditure Report (January - May)	01/01/2020	05/04/2020	05/06/2020	05/06/2020	Filed	Cooper, Tiffany	Lobbyist	
2020 Third Lobbyist Expenditure Report (May - October)	05/05/2020	10/05/2020	10/07/2020	10/06/2020	Filed	Huron, Connor	Lobbyist	
2020 Report of Advertising Campaign	01/01/2020	02/20/2020	03/13/2020	03/10/2020	Filed	Save our Whales	Lobbying Advertising Campaign	
2020 Third Lobbyist Expenditure Report (May 5 - October 5, Due Oct 7) (Lobbyist Employer / Non-Compensated Lobbyist)	05/05/2020	10/05/2020	10/07/2020	10/06/2020	Filed	New Mexico Thieves	Lobbyist Employer	
<div> <div>Rows per page: 10</div> <div>1 - 10 of 60</div> </div>								

Figure 83. Explore Lobbyist Reports on the Public Site