# New Client/Organization User Quick Guide

Hawaiʻi State Ethics Commission

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This quick guide is for company representatives and in-house lobbyists who work for client/organizations involved in state lobbying activities

- Company representatives and in-house lobbyists must have a **Client/Organization User** account to file lobbyist registrations and expenditure reports using the E-Filing System.
- If you are an external lobbyist, sign up for a **Lobbyist User** account. **See New Lobbyist User Quick Guide.**
- **Browser Requirements:** Google Chrome, Microsoft Edge, Firefox, or Safari. **Do not use Internet Explorer.**

## Sign up for a Client/Organization User Account

**Step 1** Go to New Account Sign-Up for Client/Organization User

**Step 2** **Enter your contact information** (name, email, mailing address, phone number, etc.)

**Step 3** **Search for a Client/Organization**

- Type the name of the **Client/Organization** in the search field (partial terms are ok) and **Select this client/organization**. Then check your email to complete account set-up (**Step 4**).
- If your company is not listed, verify the correct spelling. To add a new entity to the database, click **Create a client/organization** and follow the steps below:
  - Type the full name of your **Client/Organization** under **Account Name**. If the entity does business under a different name, enter both the legal name and the DBA name — e.g., ABC, Inc. (dba Alphabet Biz).
  - Enter the entity's contact information and areas of lobbying *(Check at least one subject).*
  - Type your name in the **Electronic Signature** field and click **Submit Registration** (this will add the entity to the list of client/organizations and create your user account). Then check your email to complete account set-up (**Step 4**).

***NOTE: This process creates a user account so you can access information on the E-Filing system. To register as a lobbyist, see instructions on page 2.***

**Step 4** **Check your email to complete your account set-up.**

You will receive an email with instructions on how to finish creating your user account (check your junk/spam folder). Click on the link in the email and then create a new password.

## In-House Lobbyist Registration

- If you are an in-house lobbyist, you must have a **Client/Organization User** account to register as a lobbyist.
- You may register other in-house lobbyists in your company as long as they have an existing **Client/ Organization User** account.

**Step 1**

Log in to your account, select the **Lobbyist Registration** tab on the menu bar, and click **New** to create a new lobbyist registration form.

**Step 2**

**Mandatory Lobbyist Training**

- Select or enter date when you took the mandatory lobbyist law training

  **NOTE:** Complete the training **<u>prior</u>** to submitting your lobbyist registration.

**Step 3**

**Registration Information**

- **Registration Name:** enter the first and last name of the lobbyist
- Select or enter the **Effective Lobbying Date**

**Step 4**

**Select Lobbying Firm & Lobbyist**

- For in-house lobbyists, type the name of your **Client/Organization** in the **Lobbying Firm** search field and select one of the results.
- Type the name of the **Lobbyist** in the search field (partial terms are ok) and select one of the results. Only lobbyists associated with the selected **Lobbying Firm (i.e., Client/ Organization)** will be listed.
  - ♦ Note: If you do not see the name of your in-house lobbyist, please confirm that a **Client/Organization User** account has been created for this individual**.**

**Step 5**

**Select Client/Organization**

- Type the name of the **Client/Organization** in the search field (partial terms are ok) and select one of the results.

**Step 6**

**Select subject areas of lobbying** *(Check at least one subject area)*

**Step 7**

**Enter your electronic signature & click Save to file your form.**

- After you file, you will receive an email confirmation (check your spam/junk folder).
- For a list of your registrations, click on the **Lobbyist Registration** tab on the menu bar.

## Lobbyist Termination

- To terminate your lobbyist registration, click on the **Lobbyist Registration** tab on the menu bar and select your registration form. Click **File Termination** (top right).
- In the pop-up window, select the effective termination date (current date is set as default), select reason for termination, check the certification box, and then click **Save** to file the termination notice.
- The lobbyist who was terminated will receive an email confirmation. So if you are filing on behalf of someone else, you will not get the email; instead, check the filing date on the **Lobbyist Registration** tab.