New Client/Organization User Quick Guide

Hawaii State Ethics Commission
Client/Organization User Accounts

January 2021

This quick guide is for company representatives and in-house lobbyists who work for client/organizations that are engaged in lobbying activities in the State of Hawaii

- If you are a company representative or an in-house lobbyist, you must have a **Client/Organization User** account to register an in-house lobbyist and file expenditure reports using the E-Filing System.
- Organizations that do not have a registered lobbyist must sign up for a **Client/Organization User** account to file 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, Mozilla 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 to sign up for a new account

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 (part of the name is fine) and **Select this client/organization**. Then check your email to complete account set-up (**Step 4**).
- If your client/organization 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 is to create a user account. To file a lobbyist registration form, see page 2 of this quick guide.

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 for your company as long as each person has a **Client/ Organization User** account.
- If you are not logged in, please click HERE to access the Commission's Lobbying E-Filing System.

Step 1

After you have logged 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

Registration Information

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

Step 3

Select In-House Lobbyist

- For in-house lobbyists, type the name of your **Client/Organization** in the **Lobbying Firm** search field and select one of the search results.
- Type the name of the **Lobbyist** in the search field (part of the name is fine) and select one of the search results. Only in-house 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 4

Select Client/Organization

- Type the name of the **Client/Organization** in the search field (part of the name is fine) and select one of the search results.

Step 5

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

Step 6

Enter your electronic signature & click Save to file for 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.

Termination of Lobbyist Registration

- 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 an email; instead, you can check the filing on the **Lobbyist Registration** tab.