CIVIX

Miami-Dade County
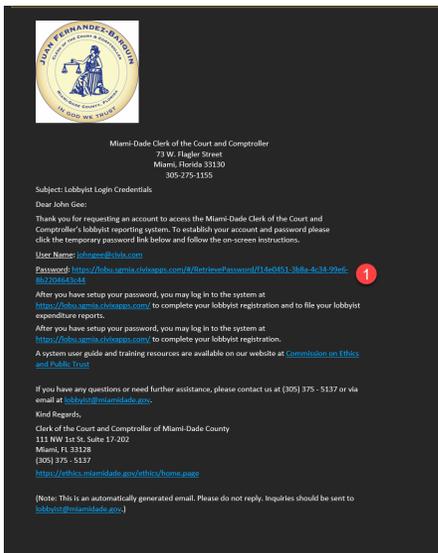
Lobbyist System
Quick Start Guide

Agenda Overview

- Part 1 – Existing User Sign in

- Part 2 – New Lobbyist Registration

- Part 3 – New Principal Registration

- Part 4 – Using your account (Lobbyists)

- Part 5 – Training Course (Lobbyists)

- Part 6 – Using your account (Principals)

Part 1 – Existing User Sign in

Part 1 Existing User Sign in – Account creation

- Users registered in the legacy system with a valid email address will receive an email with a link to create credentials in the new system.

- Your email address will serve as your username in the new system

- Follow the Link to create a password in the email

- System will prompt you to create answers to security questions and a new password.

Part 1 Existing User Sign in – Login

- Once you have created your security questions and password, you are ready to sign in from the public site. Follow the link to "Log In" from the top of the page.
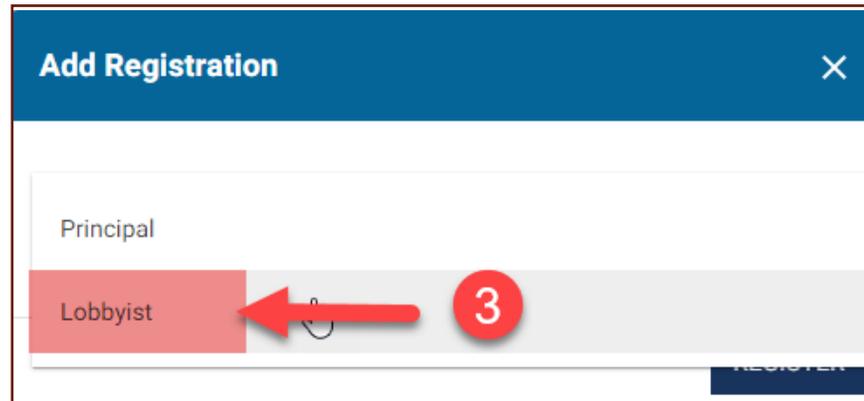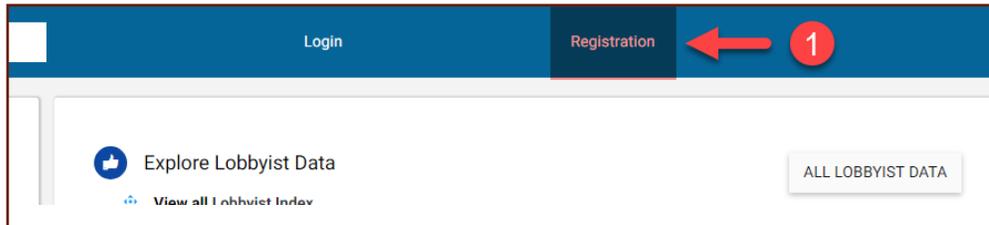
Part 2 – New Lobbyist Registration

Part 2 New Lobbyist Registration – Public Site

1. From the Public site, you will select "Registration"

2. Choose "Lobbyist Reporting"

3. Choose Registration type "Lobbyist" and select button to "Register"

Part 2 New Lobbyist Registration – Information

- Complete Lobbyist Information, Contact Information, and Address Information sections (Note email will be your username for login)

Lobbyist Information

Registration for year ▼

| Prefix ▼ | First Name | Middle Name | Last Name | Suffix ▼ |

Have you been employed by the county within the last 2 years? (Required)

○ Yes ● No

Lobbyist Contact Information

Country Code
+1 ▼   Phone

Lobbyist Email Address ❓

Permanent Business Address

Country
UNITED STATES OF AMERICA ▼

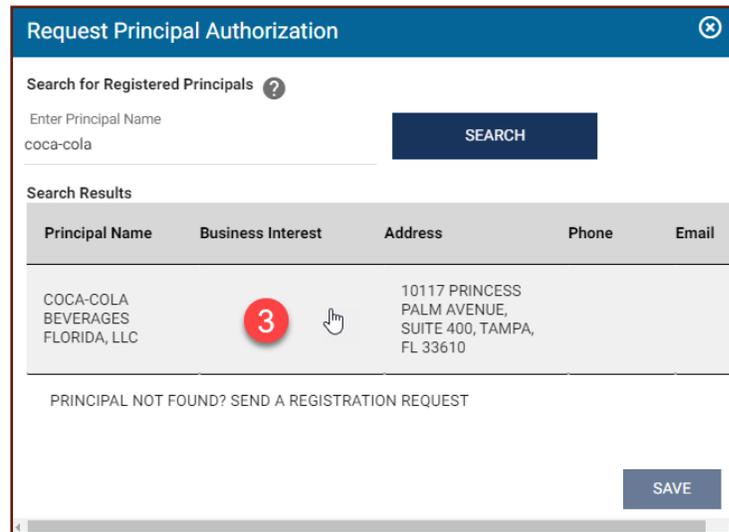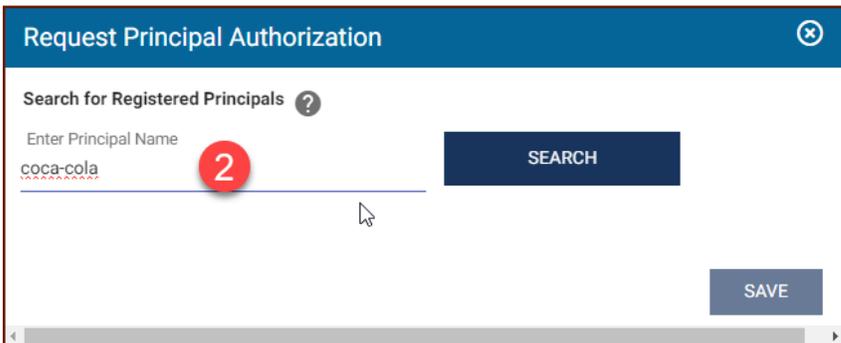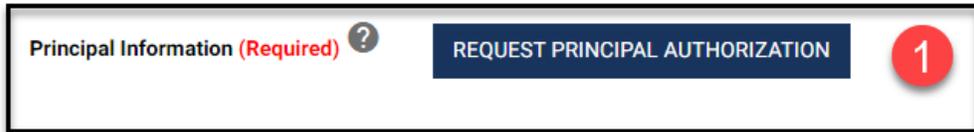Street Address   Apartment, Building, Suite, etc.

City   State
   FL ▼   Zip Code

Part 2 New Lobbyist Registration – Request Registered Principal

1. Select "Request Principal Authorization"

2. Input a registered Principal in "Enter Principal Name" field and select "Search"

3. Select the desired Principal from the returned list of possible matches

4. Enter Lobbying Issue and Save
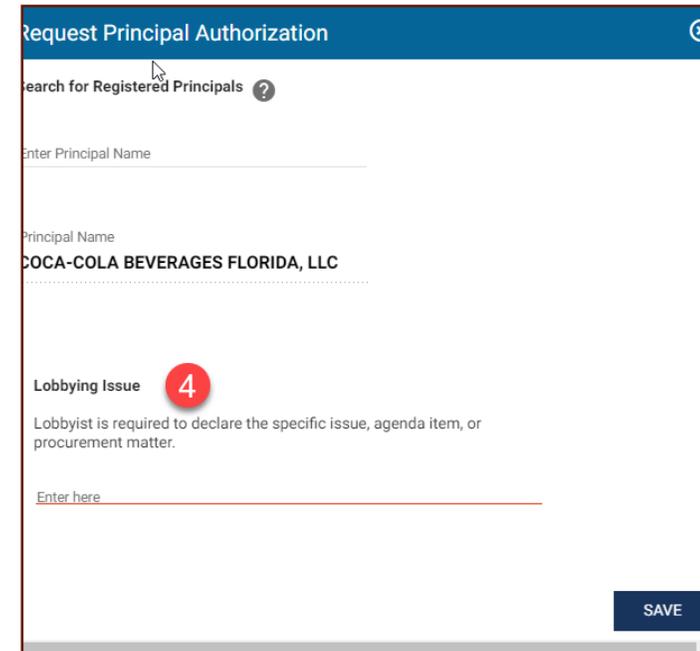
Part 2 New Lobbyist Registration – Request Unregistered Principal

1. Select "Request Principal Authorization"

2. Input an unregistered Principal in "Enter Principal Name" field and select "Search"

3. Select "Principal Not Found? Send a Registration Request" Button

4. Enter Name, Email, and Lobbying Issue fields and select "Send Registration Request" Button.

5. Upon reg completion, system will send an email w/ link and code for Principal to register.
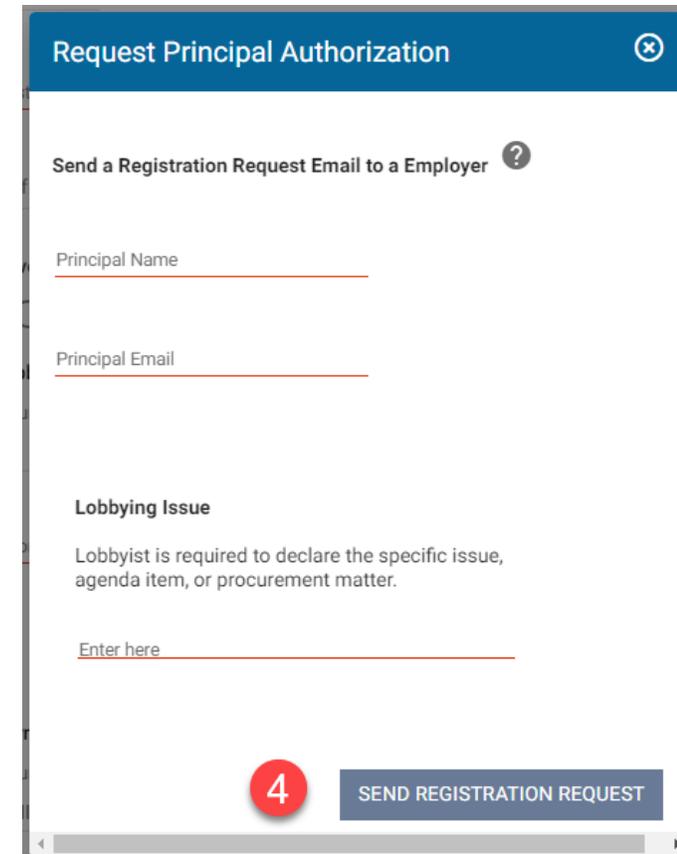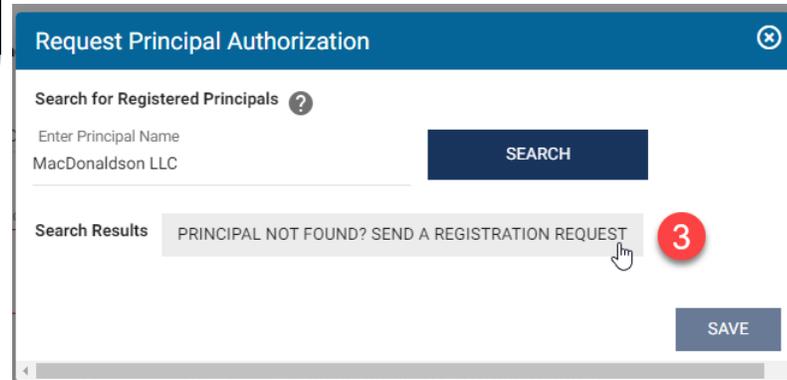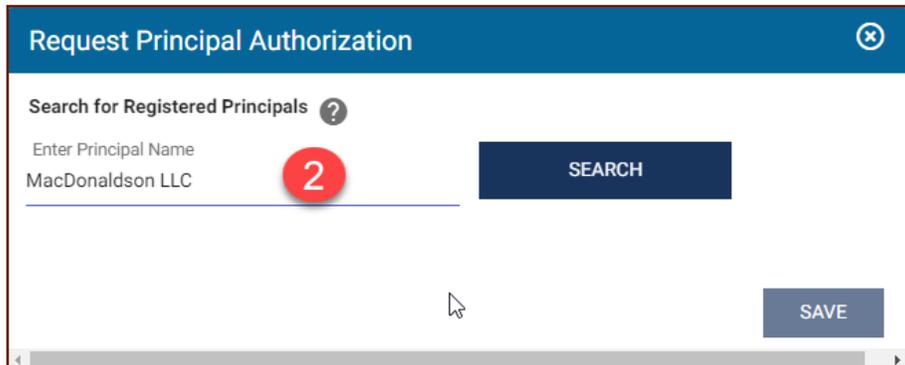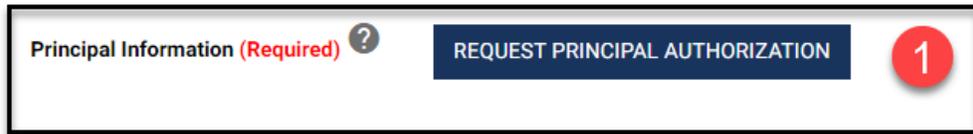
Part 2 New Lobbyist Registration – Principal Grid

1. After Completing Request Principal Authorization, you will see a grid with requested principals below.

2. Selecting the action menu allows you to edit or remove any Principals in the grid.

Part 2 New Lobbyist Registration – Payment Exemption Questions

1. For Users who are not exempt, no action is required here

2. For Users who are exempt from Registration Fees, you must select the Exemption checkbox and then a subsequent selection from the options listed

Part 2 New Lobbyist Registration – Declaration, Signature, and Submit

1. Check the boxes for the Declaration of Lobbyist

2. Type in your Electronic Signature

3. Select the Submit Button

4. Popup will appear reminding you to double check your info – select OK/Submit when you are ready

Declaration of Lobbyist

☐ I, as a registered Lobbyist, do hereby declare that I have not agreed to accept a contingency fee or success fee as defined in Section 2-11.1(s)(3)(f) of the Miami-Dade County Code, by the aforementioned Principal.

☐ Under penalties of perjury, I declare that I have read the forgoing (document) and that the facts stated in it are true.

Type Name Here   09/18/2024

Lobbyist Electronic Signature   Date of Signature
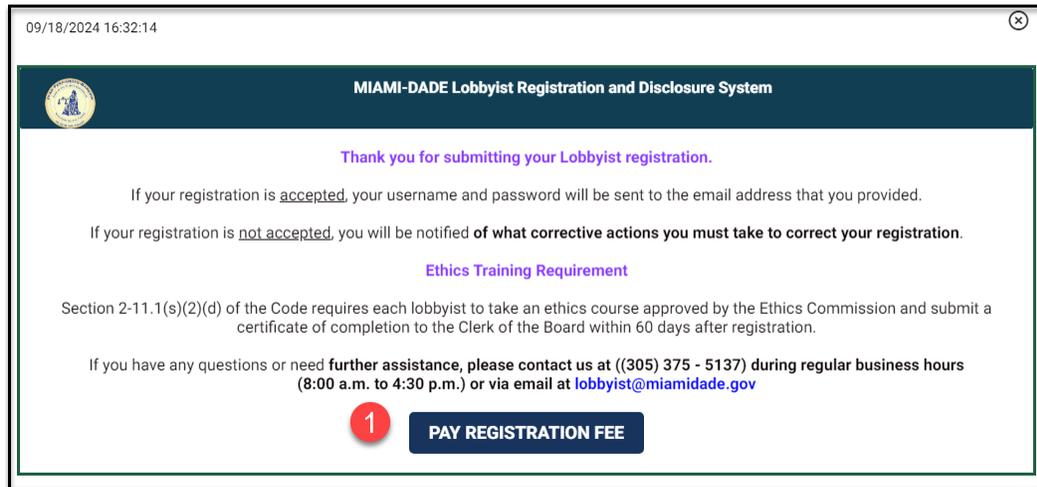
CANCEL   SUBMIT

Attention:

Please review all of your information. Once you submit your system registration, you will NOT be able to make any changes until your registration is accepted. If you would like to make any changes, click "Cancel" and make the necessary changes. Otherwise, if all of your information is correct, please click "OK/Submit". Thank you.

Cancel   OK/Submit

Part 2 New Lobbyist Registration – Registration Payment

1. After you Submit your registration, you will be presented the link to pay your registration fee. Select Pay Registration Fee Button, and Select "Credit Card" option

2. System will display Basket app. Complete and pay.

3. After payment success, system will redirect you to public page.

Part 2 New Lobbyist Registration – Credentials Email

1. After you complete registration, the system will deliver a credentials email where you will set security questions and create a password. Once this step is complete, you are ready to log in to the application.
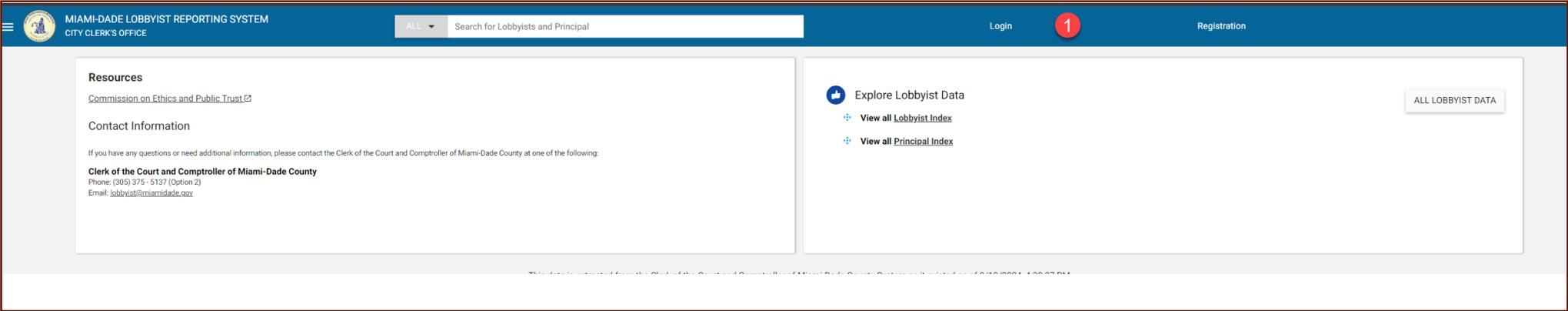
Part 2 New Lobbyist Registration – Signing in

1. Once Credentials and Password are set, you can log into the application by navigating to the Miami-Dade Lobbyist Reporting System Home page and selecting "Login".
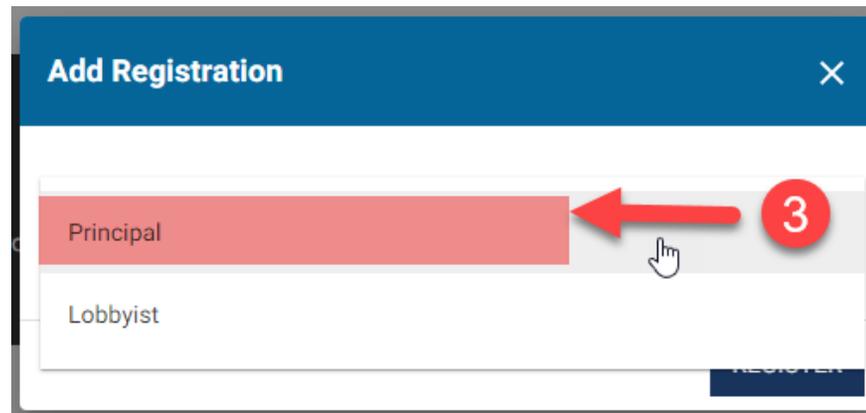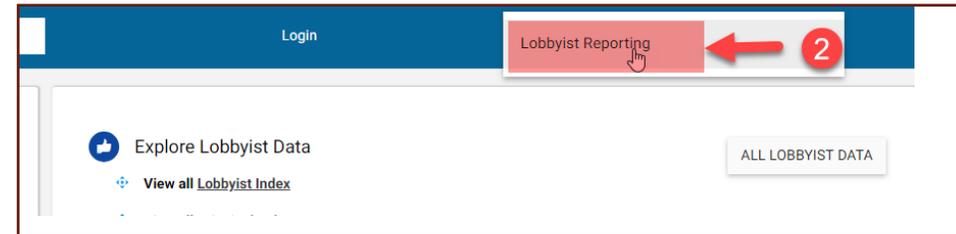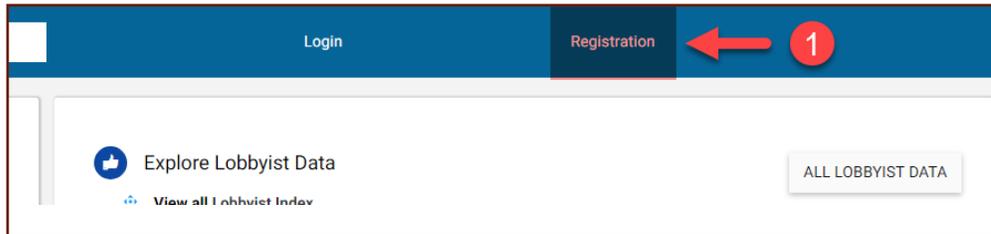
Part 3 – New Principal Registration

Part 3 New Principal Registration – Public Site

1. From the Public site, you will select "Registration"

2. Choose "Lobbyist Reporting"

3. Choose Registration type "Principal" and select button to "Register"

Part 3 New Principal Registration – Information

- Complete Principal Information and Address Information sections

Part 3 New Principal Registration – Authorize Lobbyist

1. If you have received an email request from a lobbyist requesting you register, select "Authorize Lobbyist" button

2. Input the Request ID in the field and press "Find Lobbyist" button.

3. Once lobbyist has been entered, input your lobbying issue

4. Select "Authorize".

John Gee has submitted a request to lobby on behalf of MacDonaldson LLC. You can approve the authorization request by submitting this lobbyist's token once you have a registered account. The token is only valid for the client relationship between MacDonaldson LLC and John Gee and can only be used once.

96BF368D **1**

Lobbyist Information ? **AUTHORIZE LOBBYIST** **1**

Authorize Lobbyist ⊗

Lobbyist Authorization Request ID ?

2 FIND LOBBYIST

Lobbyist Name

Date Employed 📅

Lobbying Issue
Principals are required to declare the specific issue, agenda item, or procurement matter

3 **4** 0 / 500

CANCEL AUTHORIZE

Part 3 New Principal Registration – Add Principal Contact

1. Select "+Add Principal's Contact Person"

2. Input Contact info (If info is the same as previously entered, you can use the "Contact info same as registrant" button to save time

3. Input Email (this will be the login username for the account)

4. Press save when you are done

Part 3 New Principal Registration – Declaration and Signature

1. Select the check box for the Declarations

2. Enter you Electronic Signature

3. Submit

4. Confirm when the popup shows

Part 3 New Principal Registration – Credentials Email

1. After you complete registration, the system will deliver a pending registration email to let you know your application has been received.

2. Once you have been accepted into the system, you will receive follow up email messages showing you are accepted and a credential email containing a link to create your credentials.

3. Follow the link and create your security questions and password.

4. You are now ready to log in to the application!
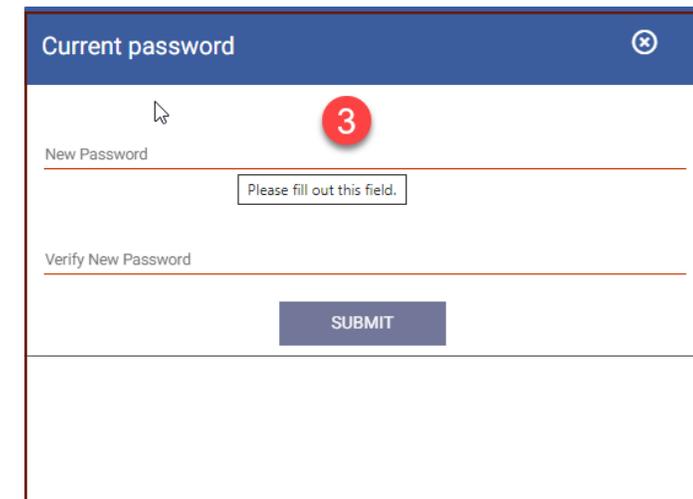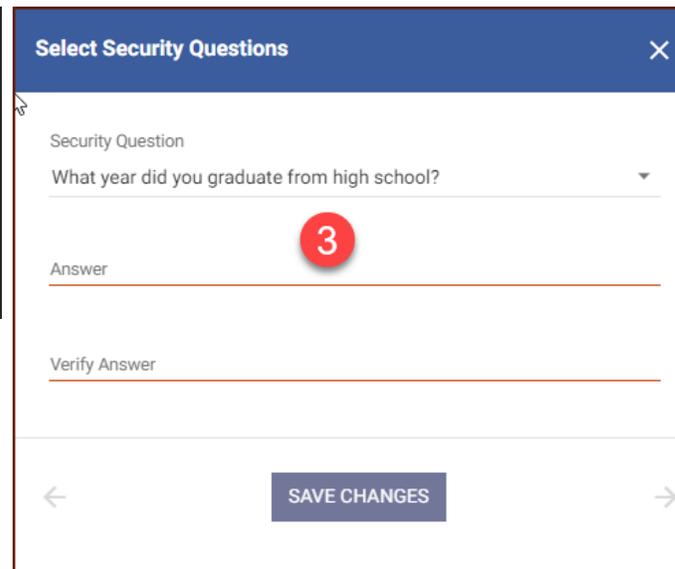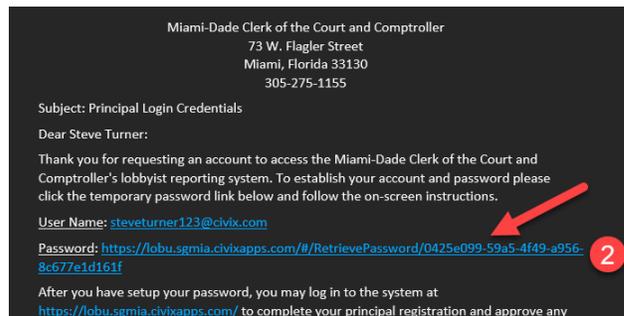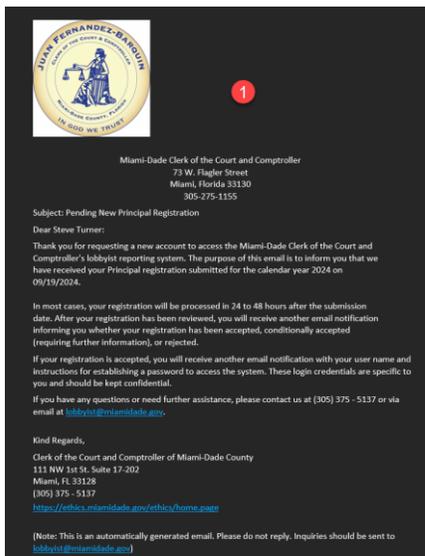
Part 3 New Principal Registration – Signing in

1. Once Credentials and Password are set, you can log into the application by navigating to the Miami-Dade Lobbyist Reporting System Home page and selecting "Login".
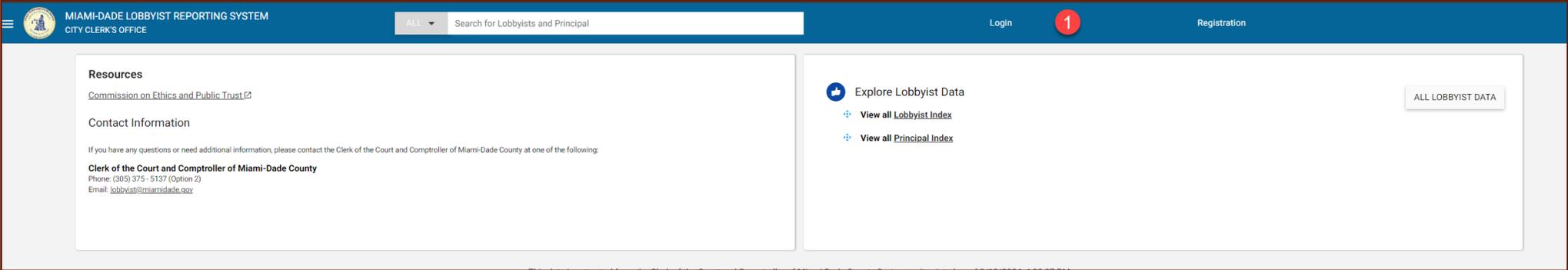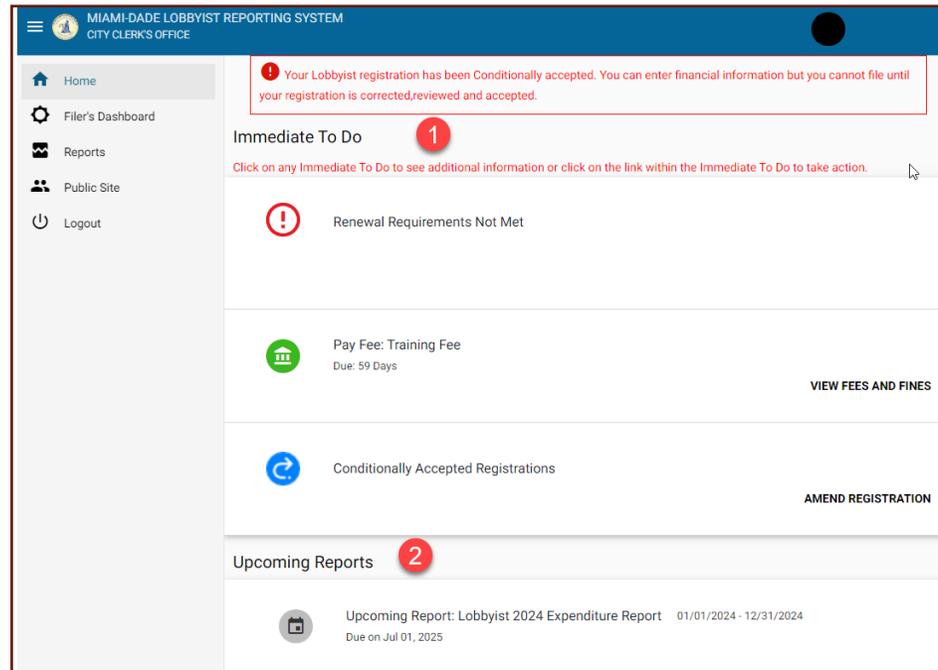
Part 4 – Using your account

Lobbyists

Part 4 Using your account (Lobbyists) – Home screen

1. Once Credentials are set, you can log into the application by navigating to the Miami-Dade Lobbyist Reporting System Public page and selecting "Login". The first screen you see is the Home Screen, which includes to dos for common tasks. **Important to note – this screen will remind you when training fees and the training course is due, and includes links to take necessary action.**

2. The Home screen also lists upcoming reports.

Part 4 Using your account (Lobbyists) – Filer's Dashboard

1. The next option in the menu is filer's dashboard, which contains important information and account controls

2. The Principal Grid Allows you to view associated Principals and your relationship status

3. You can view and make payments on the Fees and Fines tab

4. Correspondence tab includes a history of your system generated communications

5. Filing year dropdown allows you to view info by year

6. User settings allows you to change password or security questions

7. Renew (when available) allows you to renew your registration

8. Amend (pencil icon) allows you to amend your registration.

• To add additional Principals, you will want to amend your registration and follow the steps outlined in part 2 for requesting principal authorization.

9. Lobbyist Training – This section indicates when your next Lobbyist Ethics training is due.

10. Principal action menu – you can view or withdraw from a Principal relationship.

11. View Registration

Part 4 Using your account (Lobbyists) – Reports

1. The Reports section is where you will file your expenditure Reports

2. The action Menu allows you to preview and file your report

3. The year dropdown allows you to filter by year

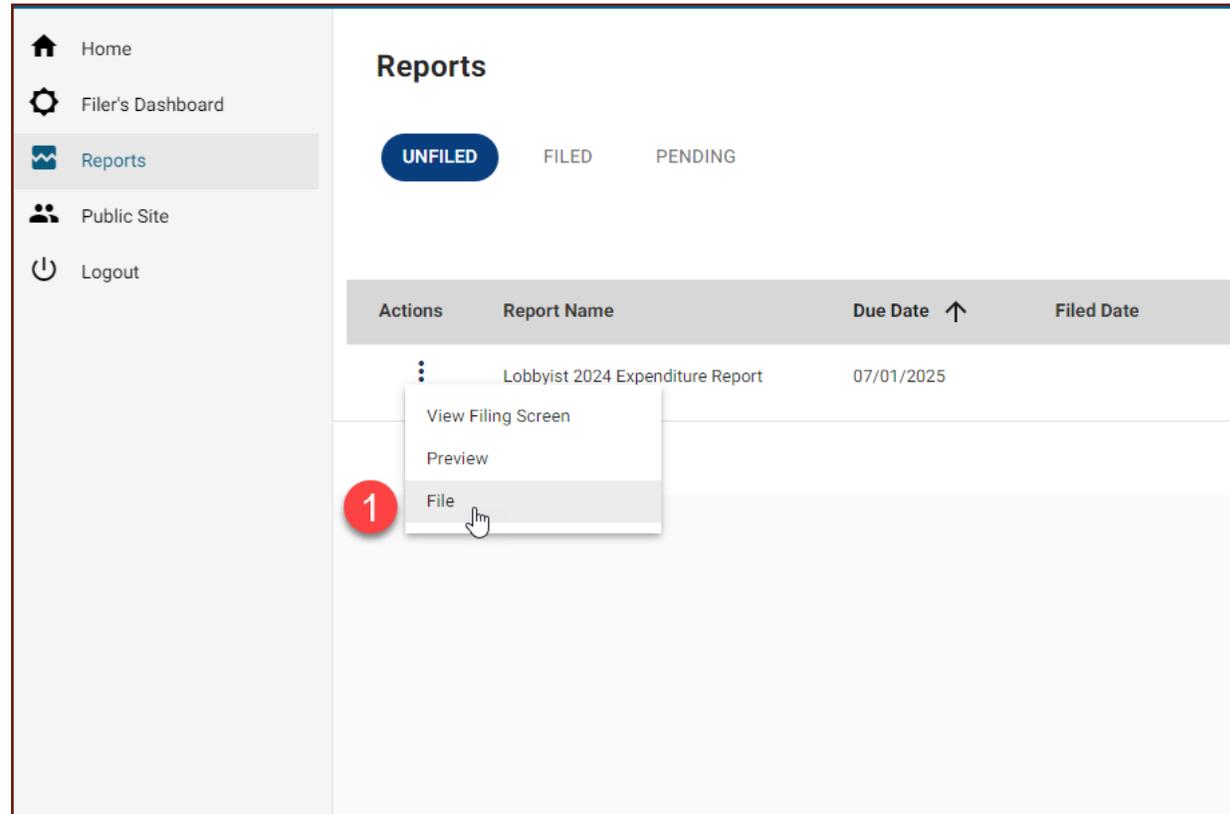4. The reports tabs allows you to sort by report status.

Part 4 Using your account (Lobbyists) – Filing action menu

1. To file, first select file from the action menu dropdown for the report you'd like to file

Part 4 Using your account (Lobbyists) – Filing screen

1. On the filing screen, only select the inactive checkbox if you wish to make your account inactive after this filing (function may be disabled)

2. Statement of no activity – Only select this if you have no Expenditures to add for this reporting period.

3. Add Expenditure – Here you will enter expenditures per Principal

4. Preview/File report (Note you must be fully accepted and not conditionally accepted for File Report button to appear)

← Lobbyist 2024 Expenditure Report **: 01/01/2024 - 12/31/2024**
Due in 203 days (Due Date: 07/01/2025)

Inactivate ❓
☐ Check here if you are filing your final report of the current calendar year. ❓ **1**

Statement of No Activity
☐ > I testcond19, test registered lobbyist for the state of MIAMI-DADE hereby declare that I did not have any contributions **2**
or expenditures since my last report was filed.

If you are not filing a Statement of No Activity, please enter transactions in each of the following sections. If you do not have any transactions to report for a specific section, please select the None checkbox.

Expenditure ❓
☐ None **+ ADD** **3**

4

PREVIEW   **FILE REPORT**

Part 4 Using your account (Lobbyists) – Enter Expenditures

1. On the Add Expenditure screen, we will see a list of every associated Principal for the given report. Enter expenditures for every category for every Principal listed, even if it is zero. Hit create when you are finished.

Part 4 Using your account (Lobbyists) – File Report

1. Once you have selected no activity or entered all transactions for associated Principals, you are ready to file your report. Select the file report button at the bottom of the screen (Note you must be fully accepted and not conditionally accepted for File Report button to appear)

2. System will prompt you to enter your title and Electronic Signature. Enter and select "Agree" to

Part 4 Using your account (Lobbyists) – Viewing Filed Report

1. Once you have filed, you can go to the Reports > Filed tab to view any filed reports by choosing the report and opening the action menu. You can also amend reports this way if you need to make a correction.

Part 5 – Training Course

Lobbyists

Part 5 Training Course (Lobbyists)

1. Once Credentials are set, you can log into the application by navigating to the Miami-Dade Lobbyist Reporting System Public page and selecting "Login".

2. If you are due to pay and take training, on your home screen you will notice an immediate to do to Pay Fee: Training Fee
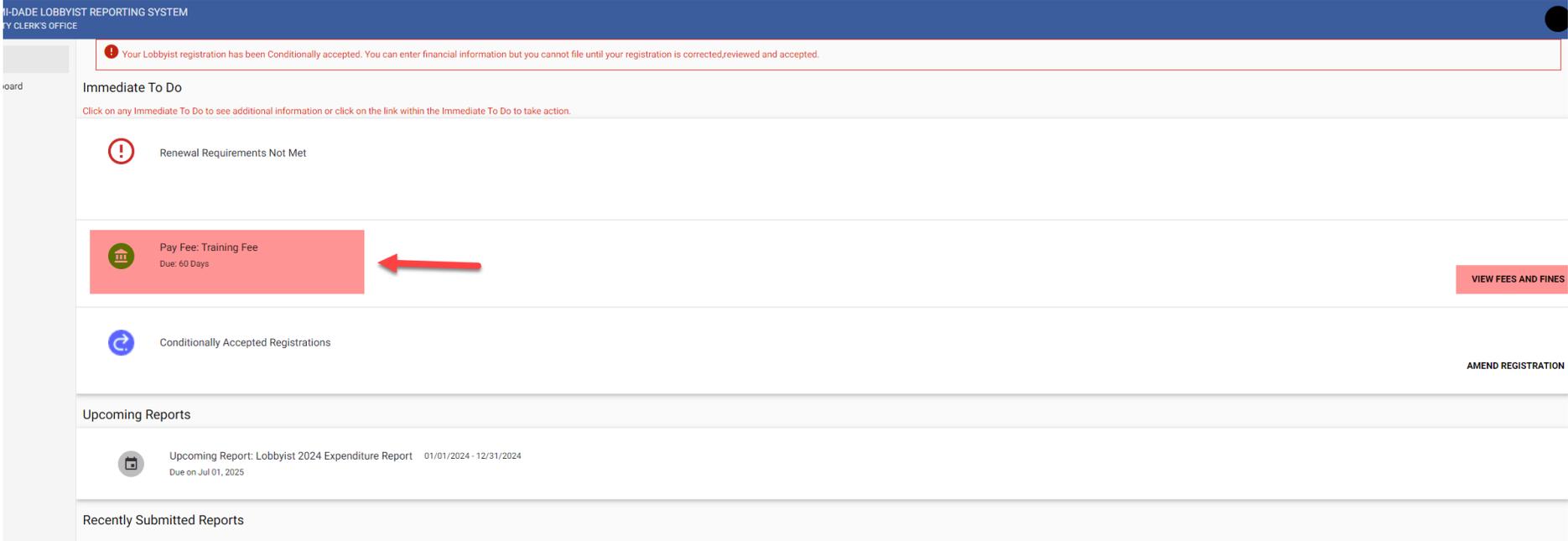
Part 5 Training Course (Lobbyists)

1. You can navigate using the to do on the Home screen or go to the filer's dashboard to access your fees/fines where you will find the link to pay for training. Select "Pay Fees or Fines". *Note* **You will pay for training here on the Miami-Dade Lobbyist Reporting System Application. Once you have paid, the system will supply you a link to take the lobbyist training course. It can be found on the Home screen to do list. Upon course completion, please email your certificate to Miami-Dade for validation and full acceptance into the application.**

Part 5 Training Course (Lobbyists)

1. On the Add payment screen, select the checkbox for "Training Fee" and then press the "Pay selected fees" button.

2. System will redirect you to the payment basket app where you enter your information and submit payment.

Part 5 Training Course (Lobbyists)

1. Once you successfully complete payment on the payment basket, the system will redirect you back to the Lobbyist Reporting System.

2. If successful, you will be able to see your payment in "Payment History" section. Additionally, in your Fees and Fines section, you can select "Paid" from the dropdown to view paid Fees and Fines.

Part 5 Training Course (Lobbyists)

1. Next, to complete your training, you will want to select the "Home" button in your left hand side menu. In the list of Immediate to dos, you will notice an item "Miami-Dade Ethics Training. If you don't see the link, select the icon and it will expand to display your link to training.
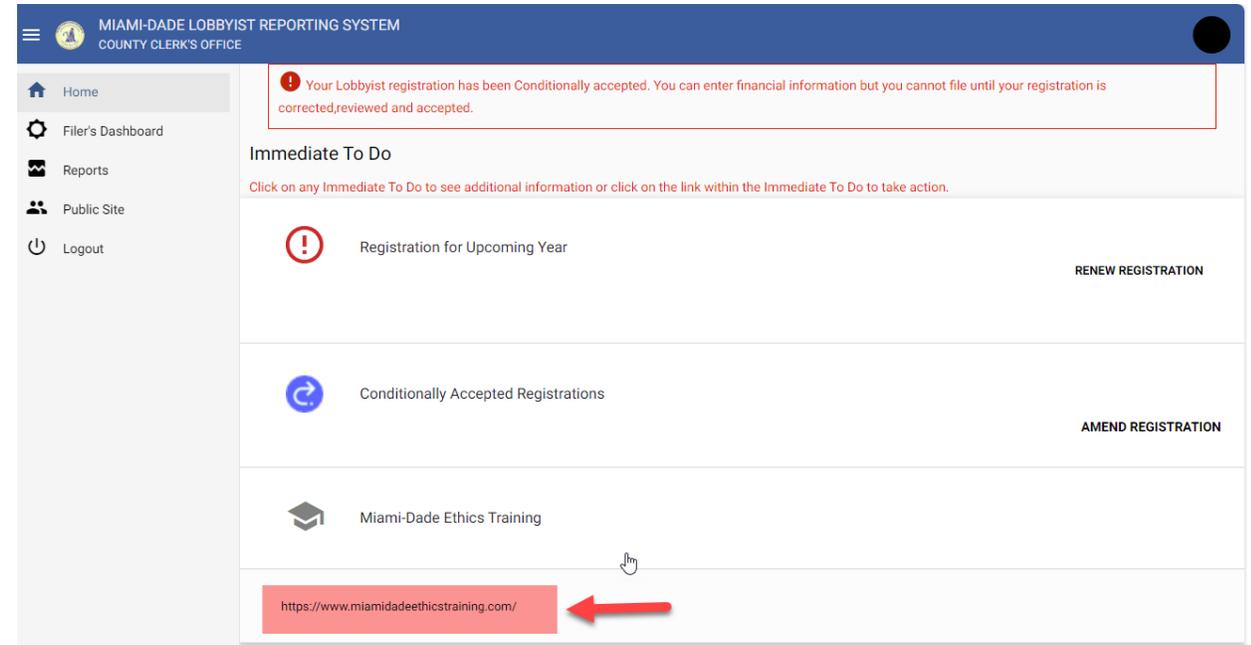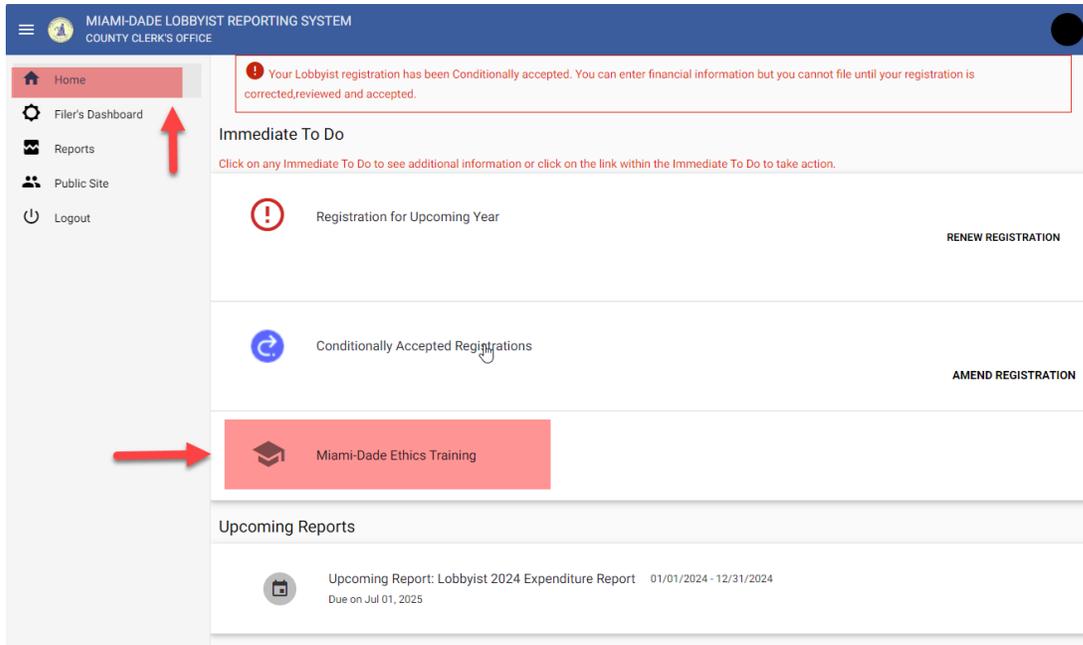
Part 5 Training Course (Lobbyists)

1. Follow the link to training. You will be redirected to the training course page. Here you will enter existing credentials or create new ones and use those to log in to take your training course.

Part 5 Training Course (Lobbyists)

1. Once logged in, select "Play" to watch the lobbyist training course.

Part 5 Training Course (Lobbyists)

1. Once you have complete the course, select the button to View/Print certificate.
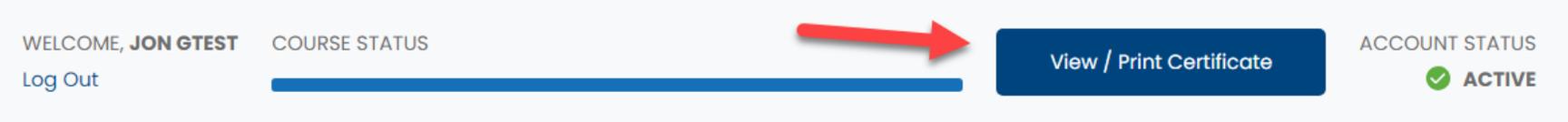
Part 5 Training Course (Lobbyists)

1. System will display your training certificate and present options below to download a PDF and Email the certificate. Please send this information along to the correct authority to complete your training.
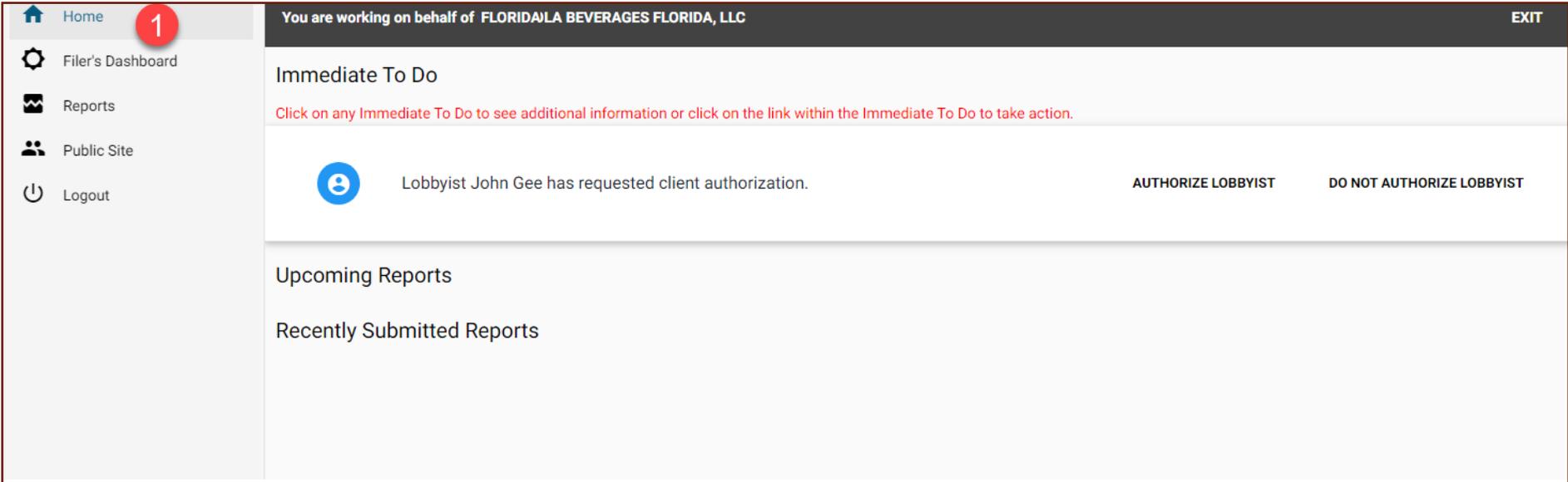
Part 6 – Using your account

Principals

Part 4 Using your account (Principals) – Home screen

1. Once Credentials are set, you can log into the application by navigating to the Miami-Dade Lobbyist Reporting System Public page and selecting "Login". The first screen you see is the Home Screen, which includes To Dos for common tasks. You may see requests for Lobbyist authorization here.

Part 4 Using your account (Principals) – Home screen

1. Filer's Dashboard section shows your account information

2. Lobbyist Grid will show your active and pending relationships. Use the action menu to Authorize or Withdraw.

3. Fees and fines – view and pay

4. Correspondence – Emails sent to you are also stored here.

5. Year dropdown – filer your view by year

6. User settings – update security info or password

7. Amend (pencil) amend your registration

8. View Registration

Thank You