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Introduction

The STAR Web Portal is designed to provide filing search functionality to the general public and online filing to registered users.

Registering as a Lobbyist

While you can search for reports without logging in to the Web Portal, you must log in to submit filings.

To log in to the Web Portal, you must be a registered user.

1. In your web browser, go to https://sos.ms.gov/elec/portal/mse12/page/onlineFiling/portal.aspx
   The Elections home page displays.

2. The Registered Lobbyist login screen displays.
3. Click the (New Users) button.

5. Please enter the words above the text box, type the words displayed in the box immediately above.
   *This is to verify that you are a person and not an automated program attempting to gain access to the system.*

6. Click the [Continue] button.

7. A form for gathering personal information displays.

8. Fill out the form.
9. Click the (Confirm) button when all information has been entered.
If the form comes back with the message “The address you entered could not be validated!” and the address is correct with no errors, then click on the [checkbox] next to “Check the box to confirm that the entered address is correct,” and then click the (Confirm) button again.

An account created screen will come up and next you will need to go to your email.

10. When the Account Created screen comes up click the (Close) button.
11. Check your email at the email address you provided. There should be a new message in your inbox with a temporary password.

Thank you for creating an account with the Mississippi Secretary of State's office.

USERNAME: slamb@dorgersoft.com
PASSWORD: 9vV8nE

You will be required to change your password upon your first login.

12. You will need the temporary password ready for the next step.
15. Enter your Username (email address) and Temporary Password and click the (Login) button. The next step will allow you to change the Temporary Password to one you create.

16. Enter your Temporary Password in the Old Password box.
15. Enter a new the password that you create in the New Password box, and once again into the Confirm Password box.
16. The password you enter into the New Password (Confirm) box must match the password you entered into the New Password box perfectly.
17. Click the (Update) button.
Tabs-lobbyist

Across the upper part of the Online Filing page are tabs where you may navigate between current Clients, Pending Clients, Terminated Clients, and your Profile. If you have more than one client there will be a tab for XMC Reports.

Client(s)

The Client(s) tab is automatically open upon login. You may navigate back to this tab by clicking on it.

Here you may register clients, view current clients, file report, and download the Lobbyist Expenses Template.
Pending Client(s)

Click on the Pending Client(s) tab to view client registrations that are incomplete or not paid for yet.

Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete.

At this point you may Submit Payment, Edit/Change, or Delete the client registration.

1. Click the **Submit Payment** button to be redirected to the Mississippi Payment Gateway.
2. Or click the **Edit/Change** button to go to the name, address and contact information page to make any changes or corrections and continue from there.
3. If you wish to delete the client registration click the **Delete** button.

My Profile

Click on the **My Profile** tap to Update, Change or View your profile.
Click the (View/Update My Profile) to go to your general information page and update your name, address, and phone information. If you need to change your password at any time click the (Change Password) button.

1. Enter your old password into the first box
2. Enter a new password that you create into the second box
3. Enter the new password again into the third box to confirm. When you enter the new password into the second and third boxes they must match perfectly.
4. Click the (Update) button to complete the password change.

Register a Client

When logged in as a Lobbyist you may register Clients.

1. Under the Client(s) tab In the Register A Client box click the (Register Client(s) button.
2. Enter your Client’s company name in the box provided for Entity Name.
If the client’s company appears in the search results click on it, and then click the (Search) button.

Under the box marked Entity Name, Click on the name of your client’s company to continue registration.

If the client’s company does not appear in the search results you may click the (New) button to continue.

This takes you to a page to fill in the client’s business address and contact information. The client’s address and contact information will not have to be filled out if you selected a company.
from the search results. If it is a new company or there are no matching records you will need to fill out the client’s address and contact information.

- Fill in the Physical Address Information, Mailing Address Information (or click the [checkbox] next to Mailing address same as Physical), and Contact Information.
- When you are finished filling in the information, click the (Next) button to continue.
If the form comes back with the message “The address you entered could not be validated!”, but the address is correct with no errors click on the [checkbox] next to “Check the box to confirm that the entered address is correct,” and then click the (Next) button again.

3. Fill in Client Business Details in the boxes provided.
4. If the client is an Agency of the State click the [checkbox] at the top right.
5. Click the (Next) button to continue to the Lobbyist Employment and Issues page.
6. Here you may enter Lobbying Issues and other Lobbyist employed by the Client.

Click on the first box under Lobbying Issue, with the (none) inside of it to open a dropdown menu.

7. In the dropdown menu you may choose from several Lobbying Issues.
8. Click on the lobbying issue that applies to the client to select it.
9. You may repeat this step in the other Lobbying Issue boxes to enter more lobbying issues if needed.

10. In the box titled Other you may enter additional information.
11. In the Lobbying Begin Date box enter the date when the lobbying begins, or click on the calendar button to bring up a calendar and choose a date from there.

12. Enter the Lobbying Ending Date

13. You may enter other Lobbyists in Mississippi Employed by the client in the box provided.

14. Click the (Next) button to continue on to review and submit your client registration.
15. Review the client’s information to be sure all is correct.
If the information displayed is not correct click the (Back) button to go to the previous page and make any necessary changes.

16. When you are sure all of the information is correct click the (Submit) button to continue.

17. Here you may choose to pay now, pay later or register another client.

- Click the (Pay Now) button to go to a page that will redirect you to the State of Mississippi Payment Gateway.
- Click the (Pay Later) button to save the client registration for later payment.
- Click the (I want to register another client) button to register another entity.

Pay Now

Click the (Next) button to go to the State of Mississippi Payment Gateway.
I want to register another client
When you click the (I want to register another client) button you will be directed back to the first page where you may enter another entity.

Pay Later
When you click the (Pay Later) button your client registration will be saved under the Pending Clients tab.

Notice
Payment must be received within 10 days of registration or the client will be removed from your profile and you will have to register the client again. State law prohibits you to lobby for clients in the list below until your payment has been received.

My Pending Client Registrations
Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete.

At this point you may Submit Payment, Edit/Change, or Delete the client registration.

18. Click the (Submit Payment) button to be redirected to the Mississippi Payment Gateway.
19. Or click the (Edit/Change) button to go to the name, address and contact information page and continue from there.
20. If you wish to delete the client registration click the (Delete) button.
Filing Reports as a Lobbyist

1. Go under the Client(s) tab on the online filings page.
2. Choose the Lobbying Year you want to view from the lobbying year dropdown menu.
3. This will display a list of Client Registrations for that year.

4. Click the Details link to review the registration and Create/Submit Lobbyist Reports. You will use this path to file Mid/End Session, Annual, and Termination Reports.
5. There are tabs across the top labeled *File a Report*, *Submitted Reports*, and *Registration Info*

6. Under the *File a Report* tab notice the box titled New Reports where you will see the *(Create Mid/End Session Report)*, *(Download Lobbyist Expense Template)* and *(Create Annual Report)* buttons.

**Create Mid/End Session Report**

- Click on the *(Create Mid/End Session Report)* button under the File a Report tab
If you are not ready to start a report Click the (Cancel) button to exit.

Click the (Mid-Session) button to start a Mid-Session report, or click the (End-of-Session) button to start an End-of-Session report.

The following steps cover both Mid-Session and End-of-Session reports.

**Expenses Actions-(Mid/End-Session report)**

Here you may either add expenses directly by clicking the (Add Expenses) button or import your expense information by first downloading the Lobbyist Expense Template by clicking the (Download Lobbyist Expense Template) button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the (Import From Spreadsheet) button.

Add Expenses

1. Click (Add Expenses) to add expenses into the Lobbying Expenditure on the next page.
2. Click the **Next** button when you are finished filling out the Lobbying Expenditure.

3. After you click the **Next** button you will be taken back to the Form E – Mid-Session- Expense Report page that shows your newly entered Expense Item.
After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient’s name and click the (Edit Expense) or (Remove Expense) buttons. The (Edit Expense) button will take you back to the Lobbying Expenditure page where you may change the information entered. The (Remove Expense) button will delete the selected expense.
Import from Spreadsheet

1. You may Import Expenses from a Spreadsheet by clicking on the (Import From Spreadsheet) button.

2. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the (Download Lobbyist Expense Template).

3. Next you will come to a screen where you may choose a file from your computer

4. Click the (Choose File) button which will open a window where you may choose a file from your computer.
5. Click the (Upload) button to import your Excel Sheet.
1. Click the (Add Receptions) button to go to a page with a Lobbyist Receptions form to fill out.

2. After you click the (Next) button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.
3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the (Edit Receptions) or (Remove Receptions) buttons. The (Edit Receptions) button will take you back to the Lobbyist Receptions page where you may change the information entered. The (Remove Receptions) button will delete the selected expense.
Report Actions-(Mid/End-Session report)

1. Click the **(Preview Report)** button to preview the report before submitting.

OR

2. Click the **(Submit Report)** button to continue to submit report.

3. If you think that something needs to be changed or modified on the report click the **(Cancel)** button.

4. If you are sure that the report is correct click the **(Submit)** button.
5. Click the [Check box] next to the reports you would like to submit, and click the (Next) button to continue.

6. Click the (OK) button to continue.
7. The Submitted Report can now be viewed under the Submitted Reports tab.

8. To view or print the report, first click the [check box] that corresponds with the report, click the (View/Print Report(s)) button. If there are changes that need to be made to the report, click the (Amend Report(s)) button.
Create Annual/Termination Report

1. Go under the **Client(s)** tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

3. This will display a list of Client Registrations for that year click on the **Details** link.

4. To create Annual or Termination reports click the **(Create Annual Report)** button.

5. This will take you to the Form A Type page where you may choose between Annual or Termination Report.
To create annual reports click the (Annual Report) button.

OR

To create termination reports click the (Termination Report) button.

Annual Report

1. Click on the [checkbox] to the left that corresponds with the expense reports you wish to import to the Annual or Termination report.
2. Click the (Next) button.
3. Add compensation by clicking the (Add/Edit Compensations) button.
4. Fill out the Lobbyist Compensation form.

5. Click the (Next) button.

6. To add administrative costs click the (Add/Edit Administrative Costs) button.
Fill out the Lobbyist Administrative Cost form and click the *(Next)* button.
Expenses Actions-(Annual Report)

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button.

Add Expenses

4. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.
5. Click the **Next** button when you are finished filling out the Lobbying Expenditure.

6. After you click the **Next** button you will be taken back to the Annual Report page that shows your newly entered Expense Item.
After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient’s name and click the (Edit Expense) or (Remove Expense) buttons. The (Edit Expense) button will take you back to the Lobbying Expenditure page where you may change the information entered. The (Remove Expense) button will delete the selected expense.
6. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

7. First you will need to have the **Lobbyist Expenses Template** downloaded. The **Lobbyist Expenses Template** can be downloaded by clicking the **(Download Lobbyist Expense Template)**.

8. Next you will come to a screen where you may choose a file from your computer.

9. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.
Click on the Excel Sheet you wish to upload and click the (Open) button.

Next you should see the file you opened in the Choose File box and an (Upload) button has appeared.

Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Choose File  Lobbyist Expenses Template2.xlsx  Upload  Cancel

10. Click the (Upload) button to import your Excel Sheet.

Receptions Actions-(Annual Report)
1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.
3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the (Edit Receptions) or (Remove Receptions) buttons. The (Edit Receptions) button will take you back to the Lobbyist Receptions page where you may change the information entered. The (Remove Receptions) button will delete the selected expense.
Report Actions -(Annual Report)

1. You may see a preview of your annual report before submission by clicking the (Preview Annual Report) button. A separate window will open with a preview of your annual report.

2. After reviewing the annual report for correctness, if you are ready to submit click the (Submit Annual Report) button. This will bring you to a Submit Report screen.

3. Click the (SUBMIT) button.

4. On the next screen check the [checkbox] that corresponds with the report you would like to submit. Or check the [checkbox] next to All.

5. Click the (Next) button to continue.

6. Click the (OK) button to finish.
Termination Report

1. Go under the Client(s) tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

3. This will display a list of Client Registrations for that year click on the Details link.

4. In order to create a termination report, click the (Create Annual Report) button.
5. Click on the **(Termination Report)** button.

6. On the Expenses screen check the [checkbox] that corresponds with the expense report you wish to add to the Termination report.

7. Click the **(Next)** button.

8. Add compensation by clicking the **(Add/Edit Compensations)** button.
9. To add administrative costs click the (Add/Edit Administrative Costs) button.
Expense Actions-(Termination report)

- Here you may either add expenses directly by clicking the (Add Expenses) button or import your expense information by first downloading the Lobbyist Expense Template by clicking the (Download Lobbyist Expense Template) button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the (Import From Spreadsheet) button.

Add Expenses
7. Click (Add Expenses) to add expenses into the Lobbying Expenditure on the next page.

8. Click the (Next) button when you are finished filling out the Lobbying Expenditure.

9. After you click the (Next) button you will be taken back to the Termination Report page that shows your newly entered Expense Item.
After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient’s name and click the (Edit Expense) or (Remove Expense) buttons. The (Edit Expense) button will take you back to the Lobbying Expenditure page where you may change the information entered. The (Remove Expense) button will delete the selected expense.
11. You may Import Expenses from a Spreadsheet by clicking on the (Import From Spreadsheet) button.

12. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the (Download Lobbyist Expense Template).

13. Next you will come to a screen where you may choose a file from your computer.

14. Click the (Choose File) button which will open a window where you may choose a file from your computer.
15. Click the (Upload) button to import your Excel Sheet.
Receptions Actions-(Termination report)

1. Click the **Add Receptions** button to go to a page with a *Lobbyist Receptions* form to fill out.

![Receptions Actions Form](image)

- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- Fill in the rest of the boxes
- Click the **Next** button when you are finished.

2. After you click the **Next** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.
3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the (Edit Receptions) or (Remove Receptions) buttons. The (Edit Receptions) button will take you back to the Lobbyist Receptions page where you may change the information entered. The (Remove Receptions) button will delete the selected expense.
Report Actions – (Termination report)

1. You may see a preview of your termination report before submission by clicking the (Preview Termination Report) button. A separate window will open with a preview of your annual report.
2. After reviewing the termination report for correctness, if you are ready to submit click the (Submit Termination Report) button. This will bring you to a Submit Report screen.

3. A Termination Report submission cannot be reversed

4. Click the (SUBMIT) button if you are ready to submit or click the (CANCEL) button if you are unsure.
Filing Reports as a Lobbyist with multiple clients-XMC Reports

If you have multiple clients you may save time by filing a XMC Report and only when you have more than one client will the XMC Reports tab show.

1. Click the **(Create XMC Report)** button.

2. Click on the Form Filing Year.
3. Click the [checkboxes] on the left that correspond with the Entities on the right that you need to file a XMC report for.

4. Click the (Next) button.

5. Here you may enter a description of the XMC Report in the text box.

6. Click the (Next) button.
7. If you need to add a client to the report from this screen you may click the *(Add Client)* button.

- *If you have clients that can be added to the XMC report they will show on this page.*
- *Click the [checkbox] that corresponds with the client to add.*
- *Click the *(Next)* button.*
8. You may add expenses directly by clicking the **(Add Expenses)** button to be taken to the Lobbying Expenditure.
   - Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button.
9. Click the next button when you have finished filling out the lobbyist expenditure.
10. Here you may edit or remove expenses by clicking on the [checkbox] that corresponds with the expense you wish to modify.

11. Click either the (Edit Expense) or the (Remove Expense) button. Edit Expense takes you back to the Lobbying expenditure and Remove Expense will delete the expense.

**Import expenses from Spreadsheet- (XMC- report)**

1. You may Import Expenses from a Spreadsheet by clicking on the (Import From Spreadsheet) button.

2. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the (Download Lobbyist Expense Template).

3. Next you will come to a screen where you may choose a file from your computer...
4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.

5. Click the **(Upload)** button to import your Excel Sheet.
12. At this point your report is filed and you may exit.