

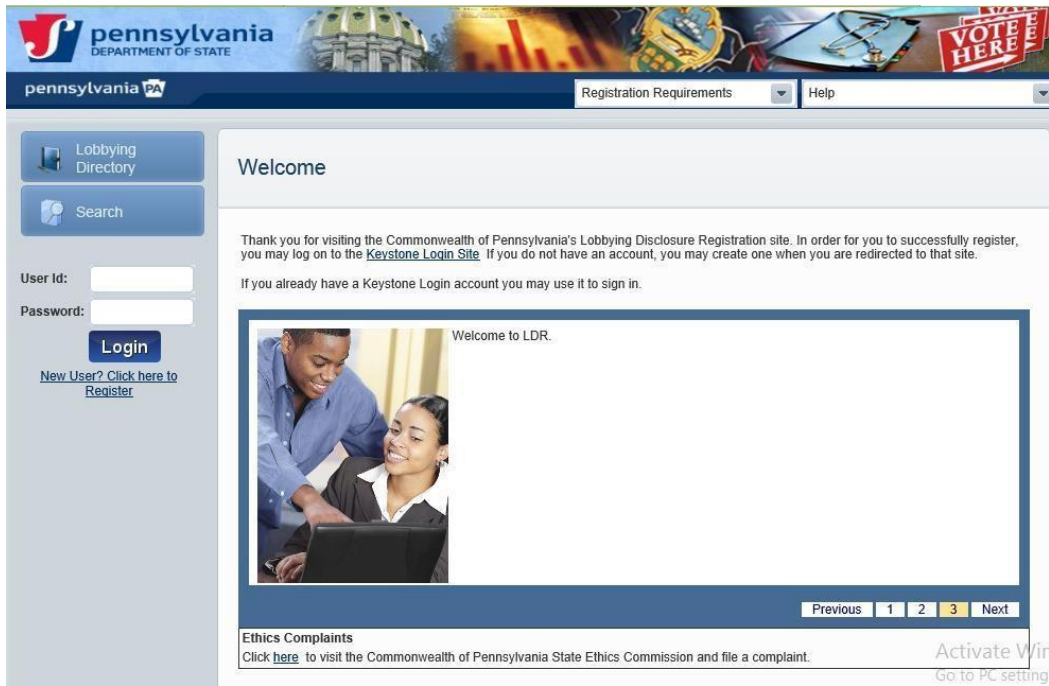


Creating a New Equity Report

This job aid will outline the steps necessary to perform the below operations:

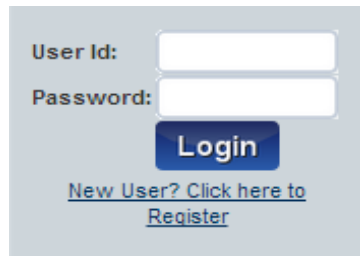
1. Electronically submit an equity report to the Division of Lobbying Disclosure Registration and Reporting at the Pennsylvania Department of State

Submitting an Equity Report

Steps	Actions
<p>1.</p>	<p>Access the LDR Website: Enter www.palobbyingservices.pa.gov in your internet browser's address line.</p> 

Steps	Actions
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2. Log In:
 Enter your Keystone Login account credentials and click **[Login]**.



The user is presented with the Public Dashboard which displays the user's Number of Registrations by Status, Number of Registrations by Type, any Equity reports which are late or due as well as the status of any Affirmations.



Registrations by Status

Status	Count	Action
Pending Amendment	26	Details
Completed	25	Details
Being Amended	26	Details
Pending	129	Details

Registrations by Type

Registration	Count	Action
Principal	133	Details
Lobbying Firm	24	Details
Lobbyist	49	Details

Expenses

Year: Quarter:

No Records Found


Affirmations

No Records Found

Equity Report

Year:

Period	Due Date	Status	Action
Jul 2021-Jun 2022	07/30/2022	Late	Details

Steps	Actions																																			
<p>3.</p>	<p>Access the <i>My Equity</i> page:</p> <p>To access the Equity page, select [My Equity] from the <i>Equity</i> sub-menu or by clicking the <u>Details</u> link in the Equity grid.</p> <div data-bbox="347 564 1425 1283" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  <p>Public Dashboard</p> <p>Registrations by Status</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Pending Amendment</td> <td>26</td> <td>Details</td> </tr> <tr> <td>Completed</td> <td>26</td> <td>Details</td> </tr> <tr> <td>Being Amended</td> <td>26</td> <td>Details</td> </tr> <tr> <td>Pending</td> <td>129</td> <td>Details</td> </tr> </tbody> </table> <p>Registrations by Type</p> <table border="1"> <thead> <tr> <th>Registration</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Principal</td> <td>133</td> <td>Details</td> </tr> <tr> <td>Lobbying Firm</td> <td>24</td> <td>Details</td> </tr> <tr> <td>Lobbyist</td> <td>50</td> <td>Details</td> </tr> </tbody> </table> <p>Expenses</p> <p>Year: <input type="text" value="2024"/> Quarter: <input type="text"/> <input type="button" value="Go"/></p> <p>No Records Found</p> <p>Affirmations</p> <p>No Records Found</p> <p>Equity Report</p> <p>Year: <input type="text"/> <input type="button" value="Go"/></p> <table border="1"> <thead> <tr> <th>Period</th> <th>Due Date</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Jul 2021-Jun 2022</td> <td>07/30/2022</td> <td>Late</td> <td>Details</td> </tr> </tbody> </table> </div> <p>The Equity Reports to be Submitted page is displayed:</p>	Status	Count	Action	Pending Amendment	26	Details	Completed	26	Details	Being Amended	26	Details	Pending	129	Details	Registration	Count	Action	Principal	133	Details	Lobbying Firm	24	Details	Lobbyist	50	Details	Period	Due Date	Status	Action	Jul 2021-Jun 2022	07/30/2022	Late	Details
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Registration Requirements | Help | Welcome kevin w

- Dash Board
- Registrations
- Transfer Registration
- Expenses
- Equity Reports
- Affirmations
- Terminations
- Search
- Lobbying Directory

Equity Reports

2023 Equity Reports to be Submitted

Each lobbyist and lobbying firm registered with the Pennsylvania Department of State is required by Act 70 of 2021 to complete Equity Report by July 30th each year.

Equity Reports Must Disclose:

Reporting Periods

The 2023 reporting period runs from July 1, 2023 , through June 30, 2024 .

What is Equity?

Equity means any interest or ownership. The term "interest or ownership" includes, but is not limited to: any interest in any share (however designated, whether voting or nonvoting); membership interests (however designated, whether voting or nonvoting); partnership interests (whether general or limited); and, any other interest that confers the right to receive a share of the profits, losses of, or distributions of property of, any partnership or business.

Note: You can continue to make changes to the Equity Report report until the reporting period closes. If you do make any additional changes to the Equity Report , please reaffirm and resubmit the Equity Report.

Equity Reports to be Completed
Completed Equity Reports
Registration Period

Page of 2
Go
Next
[View All](#)

Action	Registration Name	Status	Registration No.	Registration Type	Equity Report Period	
Filter	<input type="text"/>	All	<input type="text"/>	All	All	
Clear						
Create	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02
View						
Delete						
Create	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun	02
View						



Steps	Actions
	<p>Based on the registration period selected from the 'Registration Period' drop-down, the grid on the Equity Reports to be Submitted page will display all un-submitted equity reports for that registration period. Principal equity reports will show with a status of either 'Due' or 'Late'. Lobbying Firm and Lobbyist equity reports will show with a status of 'Not Due'.</p> <p>If the logged in user is the owner of multiple Principal registrations, even if one of those registrations are late or due, the registration status will appear as 'Late' or 'Due' in the Status column of the Equity grid on the Public User Dashboard.</p>
4.	<p>Select the Equity Report to be Submitted:</p> <p>Click the <u>Create</u> link for the desired equity report.</p> <p>NOTE: If an equity report has been started but not yet submitted, a View and Delete link will be displayed. <u>View</u> will display the view of the data entered so far and <u>Delete</u> will delete the un-submitted equity report.</p>



pennsylvania PA

Registration Requirements ▼ Help ▼

Welcome kevin white [Logout](#)

- Dash Board
- Registrations
- Transfer Registration
- Expenses
- Equity Reports
- Affirmations
- Terminations
- Search
- Lobbying Directory

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Note: You can continue to make changes to the Equity Report report until the reporting period closes. If you do make any additional changes to the Equity Report , please reaffirm and resubmit the Equity Report.


Equity Reports to be Completed
Completed Equity Reports

Registration Period 2020-2024 ▼

Page 1 ▼ of 2

Go
Next
[View All](#)

Action Filter	Registration Name	Status	Registration No.	Registration Type	EquityReport Period	Last Update
Clear		All ▼		All ▼	All ▼	
Create View Delete	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
Create View Delete	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
Create View Delete	Commonwealth Strategic Solutions, LLC	Pending	F00109	Lobbying Firm	Jul 2022-Jun 2023	02/05/2024
Create	Dunkin	Late	F48713	Lobbying Firm	Jul 2022-Jun 2023	
Create View Delete		Pending Amendment	L48737	Lobbyist	Jul 2022-Jun 2023	02/06/2024
Create	Developer 02-23, Developer 01-23	Late	L48707	Lobbyist	Jul 2022-Jun 2023	
Create View		Pending Amendment	L48740	Lobbyist	Jul 2022-Jun 2023	02/09/2024

Steps	Actions
5.	<p>Enter the Filer's Information: Enter the 'First Name' and 'Last Name' of the person submitting the equity report. If desired a Middle Name/Initial and/or Suffix may also be entered. Click [Next].</p> 

6. Review Identification Affiliations:

The following page will display the registrations affiliated to the registration which is submitting the equity report. If submitting an equity report as a Principal, the page will show all Lobbying Firms and Lobbyist which were identified on the registration as being affiliated with the principal during the equity quarter. The filer may not make any edits or additions to the affiliations through this page. They may however view the affiliation's registration by clicking on the View action link.



Equity Reports

New Registration
 Registrations
 My Registrations

Registration No: F00109

Lobbying Firm(s)/Lobbyist(s) Lobbying on Principal's Behalf Below is a list of all the lobbying firms and lobbyists identified as lobbying on principal's behalf for the registration being processed. If this list does not match the actual list of lobbyists, you will need to amend your registration to reflect the appropriate relationships.

Identification of Principal(s) Represented

Principal(s) Represented Below is a list of all the principals represented for the registration being processed. If this list does not match the actual list of principals, you will need to amend your registration to reflect the appropriate relationships.

Action	Name	Registration Number
View	Altria Client Services and its Affiliates	P00922
View	Keystone Biofuels Inc	P04879

Previous Save Cancel Next

If the filer is submitting an equity report as a Lobbying Firm or a Lobbyist, this page will display the Principals which the Lobbying Firm or Lobbyist identified during their registration as being affiliated to them. The user must add the Principals for which they are reporting equity. To do this, the user selects the desired Principal from the drop-down list and click **[Add]**. This will be repeated until all desired Principals have been identified.

After clicking **[Add]** a grid will be displayed containing the identified principals.

Identification of Principal(s) Represented

Principal(s) Represented Below is a list of all the principals represented for the registration being processed. If this list does not match the actual list of principals, you will need to amend your registration to reflect the appropriate relationships.

P40861 - NG Test

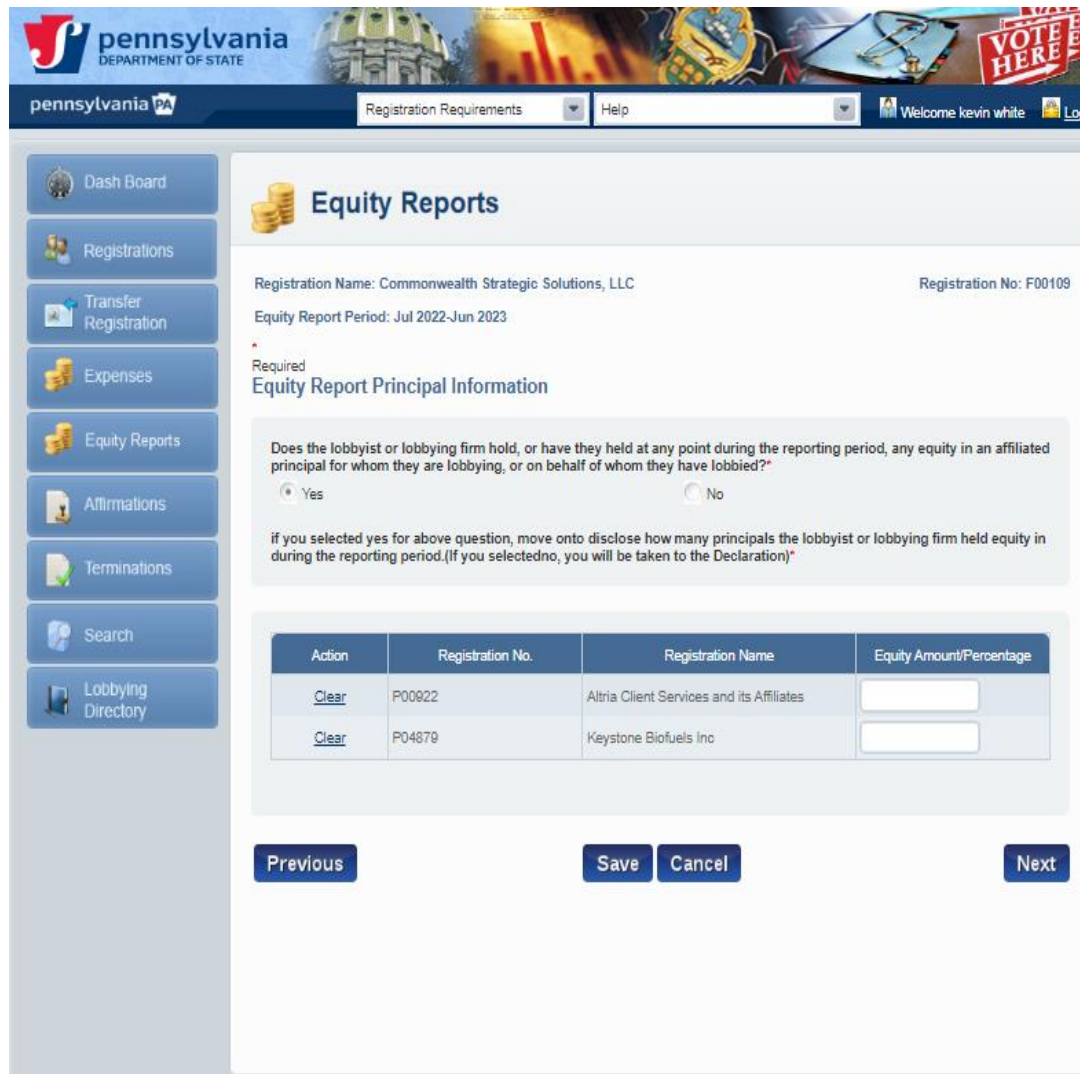
Principal(s) Represented

Action	Name	Registration Number
View Delete	UAT Test	P40849
View Delete	NG Test	P40861

Once all affiliations have been reviewed or added, click **[Next]**.

7. Submit the Equity Details:

After identifying all affiliations, the user is directed to a page to enter the equity details. There are one question on the page, each containing a 'Yes' checkbox.



Equity Reports

Registration Name: Commonwealth Strategic Solutions, LLC Registration No: F00109
 Equity Report Period: Jul 2022-Jun 2023

Required
Equity Report Principal Information

Does the lobbyist or lobbying firm hold, or have they held at any point during the reporting period, any equity in an affiliated principal for whom they are lobbying, or on behalf of whom they have lobbied?*

Yes No

if you selected yes for above question, move onto disclose how many principals the lobbyist or lobbying firm held equity in during the reporting period.(If you selected no, you will be taken to the Declaration)*

Action	Registration No.	Registration Name	Equity Amount/Percentage
Clear	P00922	Altria Client Services and its Affiliates	<input type="text"/>
Clear	P04879	Keystone Biofuels Inc	<input type="text"/>

[Previous](#) [Save](#) [Cancel](#) [Next](#)



Question 1:

Does the lobbyist or lobbying firm hold, or have they held at any point during the reporting period, any equity in an affiliated principal for whom they are lobbying, or on behalf of whom they have lobbied?*

Yes

No

if you selected yes for above question, move onto disclose how many principals the lobbyist or lobbying firm held equity in during the reporting period.(If you selectedno, you will be taken to the Declaration)*

The screenshot shows the 'Equity Reports' section of the SURE web application. The user is logged in as 'kevin white'. The page displays a form for 'Required Equity Report Principal Information' with a question about equity in affiliated principals. Below the form is a table listing various principals with their registration numbers and names. The table has columns for 'Action', 'Registration No.', 'Registration Name', and 'Equity Amount/Percentage'.

Action	Registration No.	Registration Name	Equity Amount/Percentage
Clear	P00922	Altria Client Services and its Affiliates	<input type="text"/>
Clear	P01266	ASSOCIATION OF INDEPENDENT COLLEGES & UNIVERSITIES OF PA	<input type="text"/>
Clear	P36655	Bailey Chestnut Partners, LP	<input type="text"/>
Clear	P03952	Big Brothers/Big Sisters of Southeast Pennsylvania	<input type="text"/>
Clear	P26923	Bridgeway Capital	<input type="text"/>
Clear	P33936	Bucks County Services, Inc.	<input type="text"/>
Clear	P40740	Carwash Association of Pennsylvania	<input type="text"/>
Clear	P14875	Center for Autism and Developmental Disabilities of Philhaven	<input type="text"/>
Clear	P23539	Citizens Public Adjusters, Inc.	<input type="text"/>
Clear	P34307	Coalition for Procurement Reform	<input type="text"/>
Clear	P02319	Comcast Corporation	<input type="text"/>



8.

Check the “Affirmation” checkbox. The user has the ability to sign the “Do you have a statement as to inability or refusal of lobbyist/lobbying firm to sign report” checkbox. If you do not wish to sign the refusal report, proceed directly to Step 12.

Affirmation

By checking the box below, I acknowledge that I have a continuing duty to disclose any equity throughout a reporting period.*

Affirm

By typing my name below, I affirm that I have the knowledge necessary to complete the Equity Report and the foregoing information is true and correct to the best of my knowledge, information, and belief; said affirmation being made subject to the penalties prescribed by 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).*

Type your name below.

First Name : *

test

Middle Initial :

Last Name : *

z

Suffix:

Title :

Date Signed :

02/12/2024

What is your relationship to the lobbying firm (if applicable)?

Enter you answer

Previous

Save

Cancel

Submit



- | | |
|------------|--|
| 12. | Click "Submit". The equity report is submitted successfully. User can print a friendly version of the equity report, return to their dashboard or return to the equity page. |
|------------|--|



Registration Requirements

Help

Welcome kevin white

Logout

- Dash Board
- Registrations
- Transfer Registration
- Expenses
- Equity Reports
- Affirmations
- Terminations
- Search
- Lobbying Directory

Equity Reports

Required Registration Information

Equity Report Period: Jul 2023-Jun 2024

Name: Divya2 Registration No: F48762
Address: 221 state street
Erie PA 17101 E-mail:
Phone:

Principal Information

Line No	Principal Name	Registration Num	Equity Amount/Percentage
1	10,000 FRIENDS OF PENNSYLVANIA	P00983	
2	10,000 FRIENDS OF PENNSYLVANIA	P00983	12
3	10,000 FRIENDS OF PENNSYLVANIA	P00983	123

Affirmation

By checking the box below, I acknowledge that I have a continuing duty to disclose any equity throughout a reporting period.*

Affirm

By typing my name below, I affirm that I have the knowledge necessary to complete the Equity Report and the foregoing information is true and correct to the best of my knowledge, information, and belief; said affirmation being made subject to the penalties prescribed by 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).*

Type your name below.

First Name : * Middle Initial :
Last Name : * Suffix:
Title : Date Signed :
What is your relationship to the lobbying firm (if applicable)?

Previous

Save

Cancel

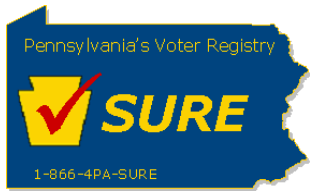
Submit



Pennsylvania Department of State
Statewide Uniform Registry of Electors (SURE)
Creating a New Equity Report
March 28, 2024

The screenshot shows the user interface of the SURE web application. At the top, there is a navigation bar with the "pennsylvania PA" logo on the left, and "Registration Requirements" and "Help" dropdown menus in the center. On the right side of the navigation bar, it says "Welcome kevin white" next to a user profile icon, and a "Logout" button. Below the navigation bar is a left-hand sidebar with three main menu items: "Dash Board" (with a dashboard icon), "Registrations" (with a group of people icon), and "Transfer Registration" (with a document and arrow icon). The main content area displays a light blue success message box with the text: "Your expense report has been successfully submitted. For a printer friendly version of your submitted expense report, please click [here](#)." Below this message are two buttons: "Return to the Dashboard" and "Return to the My Expenses page".





**Pennsylvania Department of State
Statewide Uniform Registry of Electors (SURE)
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