

Oklahoma Ethics Commission



Oklahoma Ethics Commission
Guardian 2.0 System
Onboarding Guide
Draft

DRAFT

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DRAFT

Commissioners

Five Commissioners serve on the Commission for the Oklahoma Ethics Commission, with a term of five years and no more than two successive terms. The Commissioners serve on a volunteer basis and are appointed on a staggered basis by the (1) Governor, (2) Chief Justice of the Oklahoma Supreme Court, (3) Attorney General, (4) President Pro Tempore of the Senate, and (5) Speaker of the House of Representatives.

Information on the current commissioners may be accessed on the Ethics Commission website at [Oklahoma Ethics Commission - Commissioners](#).

I. Introduction

How to Use This Guide

This Guide summarizes users' initial use of the Oklahoma Ethics Commission Guardian 2.0 System for those parties reporting to the Ethics Commission. This guide provides instructions for creating a user login/profile as well as registering with the Ethics Commission. This guide is not a substitute for the law. If there is a conflict between this Guide and the Constitution, statutes, or Rules, then the Constitution, statutes or Rules prevail. This guide does not replace the guides available at Oklahoma Ethics Commission which provide information for compliance with Ethics Rules and other relevant law for those parties reporting to the Ethics Commission. These additional guides are found at [Oklahoma Ethics Commission Guides](#).

Note: The screen shots below are subject to minor changes in verbiage or labels.

Limited Scope

This Guide is not intended to provide comprehensive information about all Ethics Rules and other relevant law concerning enforcement, complaints, complaints, and investigations.

II. The Ethics Commission's Guardian 2.0 System

The Guardian System is both a filing and disclosure system that contains financial detail and related information that lobbyists, candidate committees, political party committees, political action committees, special committees, and certain state officers and employees are required by law to disclose. Regulated users will use the system to file all required reports online. All lobbyist and committee filings are available for you to review online, save, print, or extract for further analysis.

Who should use this Guardian 2.0 System?

Users should review all registration and reporting requirements prior to registering via the links to guides below each entity. The following are types of entities needing to *Register* and use the Guardian 2.0 System:

- **Candidate Committee** A Candidate Committee is the only committee authorized by a candidate to accept contributions or make expenditures on behalf of the candidate's campaign. See [Candidate Guide](#) for more information.
- **Lobbyist or Liaison** Individuals who are compensated to engage in lobbying activities on behalf of a third party are defined by the entity they lobby and whether they are state officers or employees. See [Lobbyist Guide](#) for more information.
- **Political Action Committee (PAC)** A PAC is any group of two or more persons that receives contributions or makes expenditures for any of these purposes:
 - (1) make contributions to candidates or candidate committees;
 - (2) make contributions to other PACs;
 - (3) make election engineering communications; or
 - (4) advocate the approval or defeat of state questions.See [Political Action Committee Guide](#) for more information.
- **Political Party Committee** A Political Party Committee is a committee authorized by a political party, which is recognized under the laws of the State of Oklahoma, to accept contributions and make expenditures on behalf of the political party. See [Local Political Party Committee Guide](#) or [State Political Party Committee Guide](#) for more information.

- **Special Function Committee** A committee formed due to an elected state officer solicitation for an event or to pay litigation funds, or a state officer or employee or state agency sponsoring an event.
See [State Officers and Employees Guide](#) for more information.

What is the purpose of the Guardian 2.0 System?

This document provides an overview of the entities mentioned above on registration and onboarding. Additional guides are provided for navigation, data entry, and filing an original or amended report in the Guardian 2.0 System. Registered entities use the Guardian 2.0 System to:

1. Register parties reporting to the Ethics Commission
2. Enter Transactions — All contributions, other funds, and expenditures
3. File Reports
4. Pay Fees
5. View All Filed Reports, Perform Searches, and Download Data

III. Create an Account

Prior to registering, the user must create an account providing an email and setting a password. First time users can select the email to use for this new account. For users of the prior Guardian System, the email used to create accounts must be the same as was used in prior system to enable conversion of prior information. All information is tied to the user email. The following workflow describes the steps for users to create a new account.

Figure 1 Guardian 2.0 System Account Creation Workflow

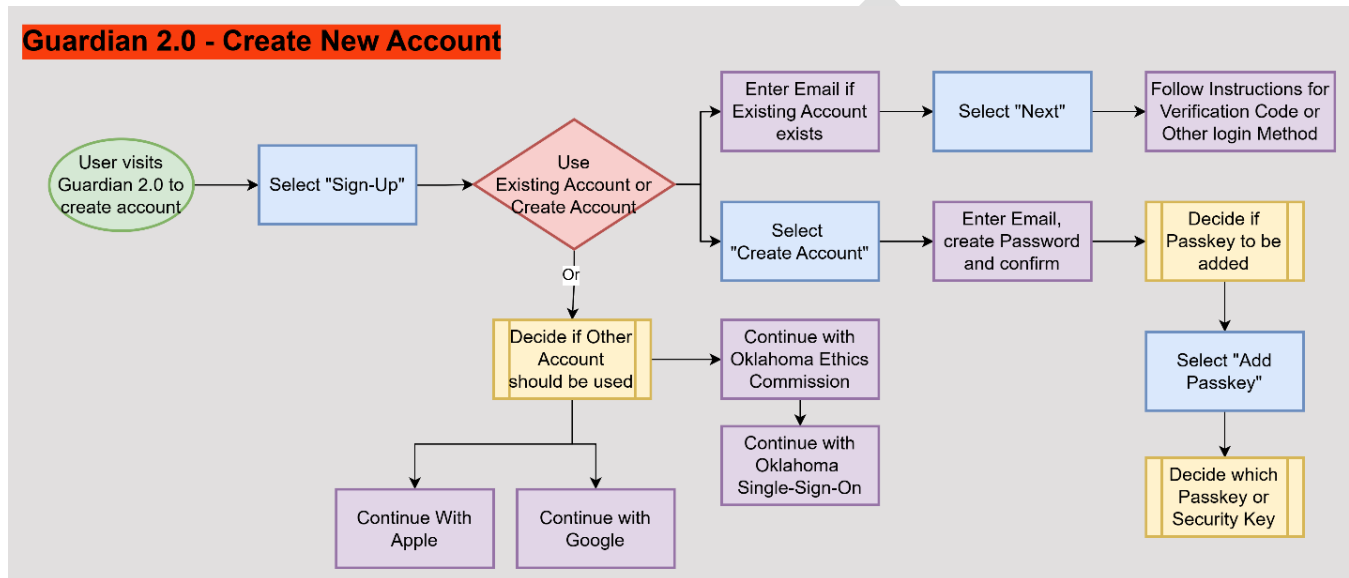


Figure 2 The Guardian 2.0 Landing Page

Users accessing the new Guardian 2.0 System will land on the following page. It provides public information but also a “Sign In” option for existing users to sign in or new users will be provided the option to create an account.

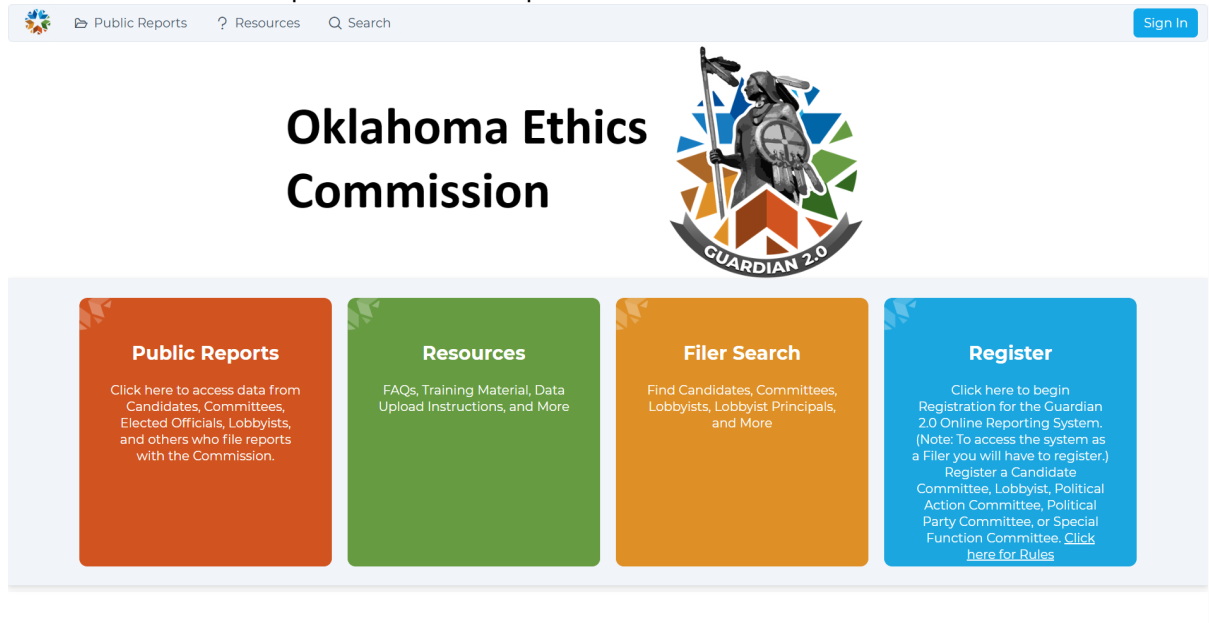


Figure 3 Select Sign In to Create Account

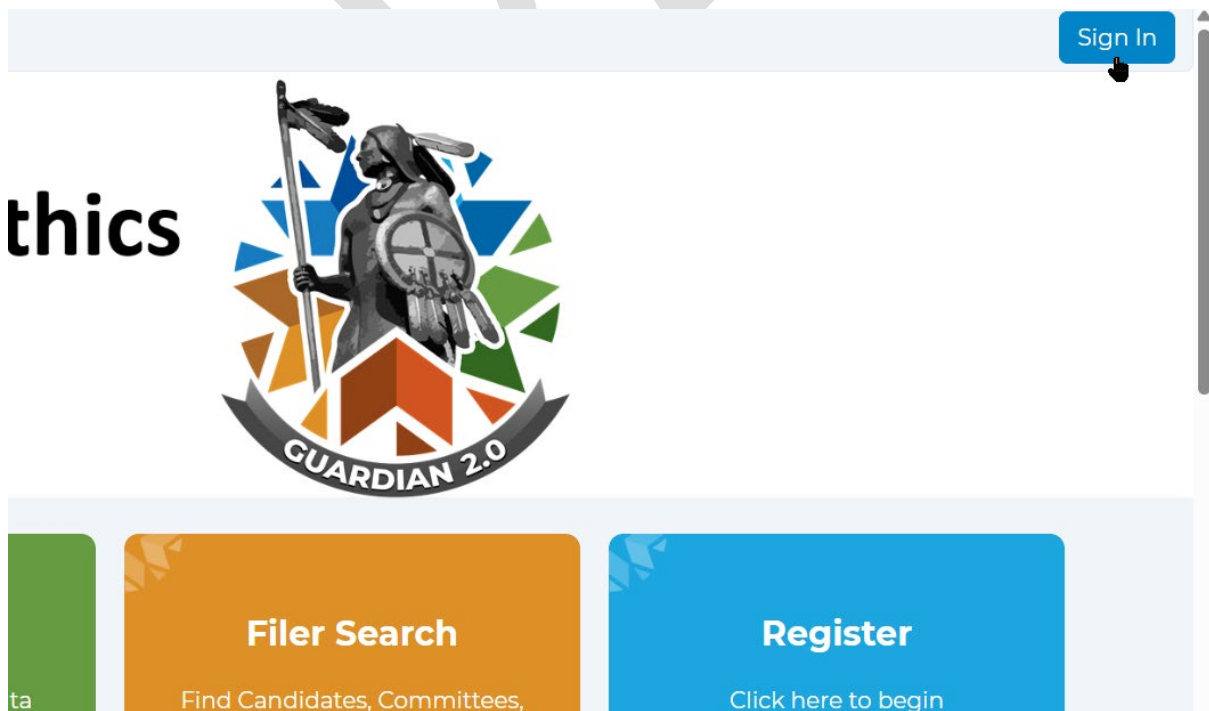
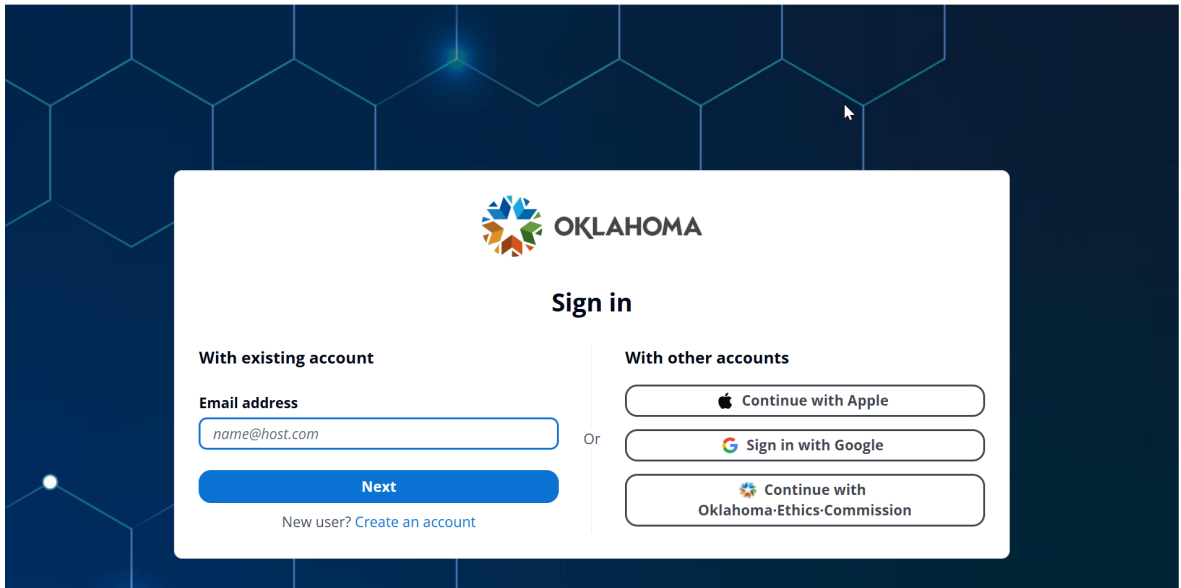


Figure 4 Enter Email to Create Account

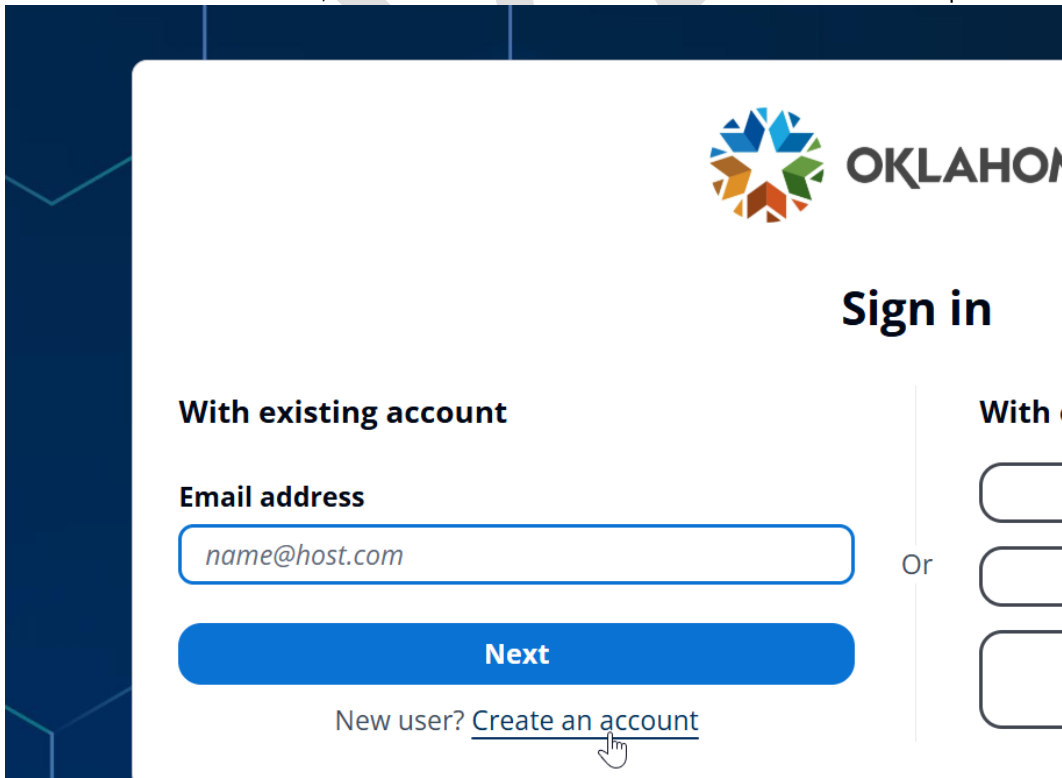
First time users can select the email to use for creating a new account. For users of the prior Guardian System, the email used to create accounts must be the same as was used in prior system to enable conversion of prior information. All information is tied to the user email.



The screenshot shows the Oklahoma Sign in interface. At the top is the Oklahoma logo and the text "OKLAHOMA". Below this is the heading "Sign in". The interface is split into two columns. The left column is titled "With existing account" and contains an "Email address" field with the placeholder "name@host.com", a blue "Next" button, and a link "New user? Create an account". The right column is titled "With other accounts" and contains three buttons: "Continue with Apple", "Sign in with Google", and "Continue with Oklahoma Ethics Commission".

Figure 5 Select Create Account

After email is entered, users will select the "Create an account" option.



The screenshot shows the Oklahoma Sign in interface, similar to Figure 4. The "Email address" field now contains "name@host.com". The "Next" button is still present. Below the "Next" button, the link "New user? Create an account" is underlined, and a mouse cursor is pointing at it. The "With other accounts" section on the right is partially visible, showing the same three buttons as in Figure 4.

Figure 6 Create Password and Confirm

The screenshot shows the 'Sign up' form for the Oklahoma system. The form is titled 'Sign up' and features the Oklahoma logo at the top. It is divided into two main sections: 'Sign up' and 'With other accounts'. The 'Sign up' section contains fields for 'Email address' (with a placeholder 'name@host.com'), 'Password' (with a placeholder 'Enter password'), and 'Confirm password' (with a placeholder 'Reenter password'). There is a checkbox for 'Show password' and a blue 'Sign up' button. Below the button is a link: 'Have an account already? Sign in'. The 'With other accounts' section contains three buttons: 'Continue with Apple', 'Sign in with Google', and 'Continue with Oklahoma-Ethics-Commission'. The background is a dark blue hexagonal pattern.

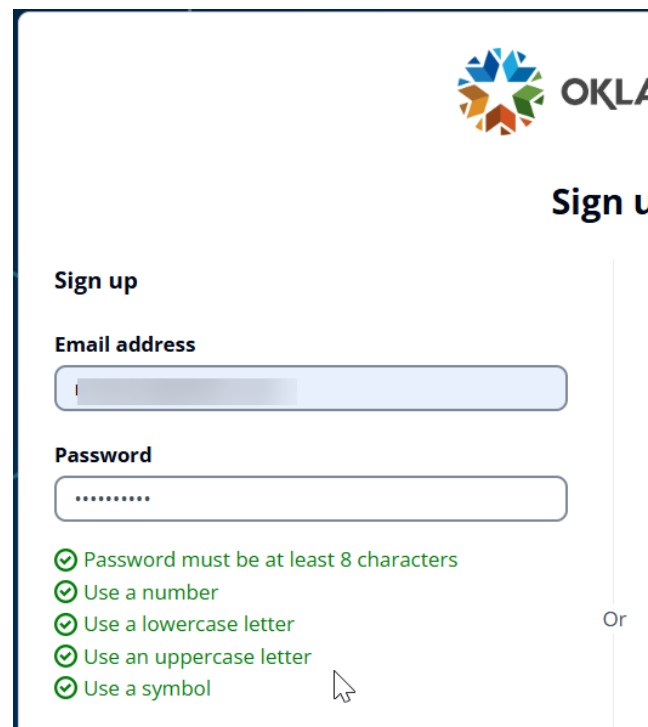
Figure 7 Follow Password Rule Entry

The screenshot shows the 'Sign up' form for the Oklahoma system, similar to Figure 6, but with additional password rules displayed below the 'Password' field. The rules are listed as follows:

- ✓ Password must be at least 8 characters
- ✓ Use a number
- ✓ Use a lowercase letter
- ✓ Use an uppercase letter
- ✓ Use a symbol

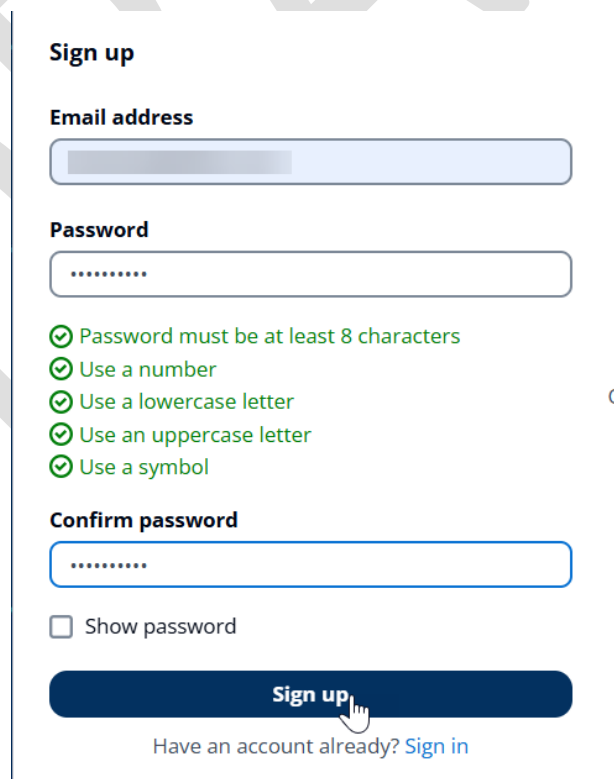
The 'Sign up' section also includes the 'Email address' field, the 'Confirm password' field, the 'Show password' checkbox, and the 'Sign up' button. The 'With other accounts' section remains the same. The background is a dark blue hexagonal pattern.

Figure 8 Password Rules



The screenshot shows the OKLA Sign Up form. At the top right is the OKLA logo. Below it, the text "Sign u" is partially visible. The form has two main sections: "Sign up" and "Email address". Under "Sign up", there is a "Password" field with a masked password "*****". Below the password field, there are five green checkmarks indicating password requirements: "Password must be at least 8 characters", "Use a number", "Use a lowercase letter", "Use an uppercase letter", and "Use a symbol". To the right of these requirements, the word "Or" is visible. A large, faint "DRAFT" watermark is overlaid on the image.

Figure 9 Sign Up Selection After Password Entry and Confirmation



The screenshot shows the OKLA Sign Up form after password entry and confirmation. The "Sign up" section is visible. Below the "Password" field, there are five green checkmarks indicating password requirements: "Password must be at least 8 characters", "Use a number", "Use a lowercase letter", "Use an uppercase letter", and "Use a symbol". Below these requirements, there is a "Confirm password" field with a masked password "*****". Below the confirm password field, there is a checkbox labeled "Show password". At the bottom, there is a dark blue button labeled "Sign up" with a hand cursor icon. Below the button, the text "Have an account already? Sign in" is visible. A large, faint "DRAFT" watermark is overlaid on the image.

Figure 10 Optional Passkey Addition

After the Entry and Confirming Password, the User Creation will be confirmed and allow for optional passkey or device authorization code entry.

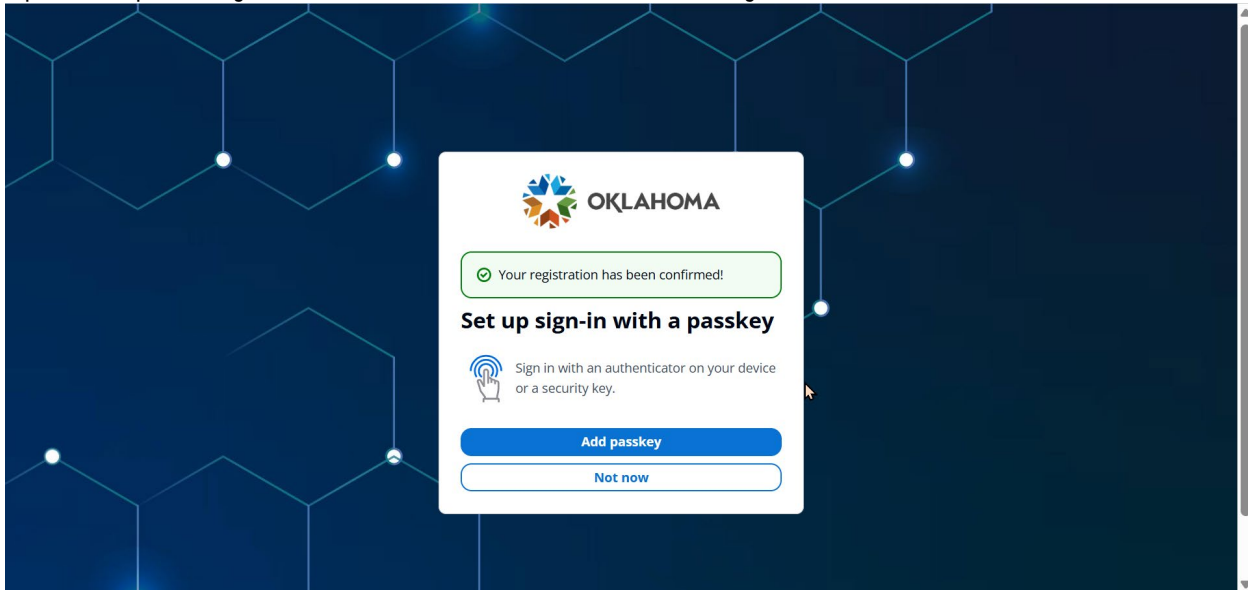


Figure 11 Optional Passkey Selection

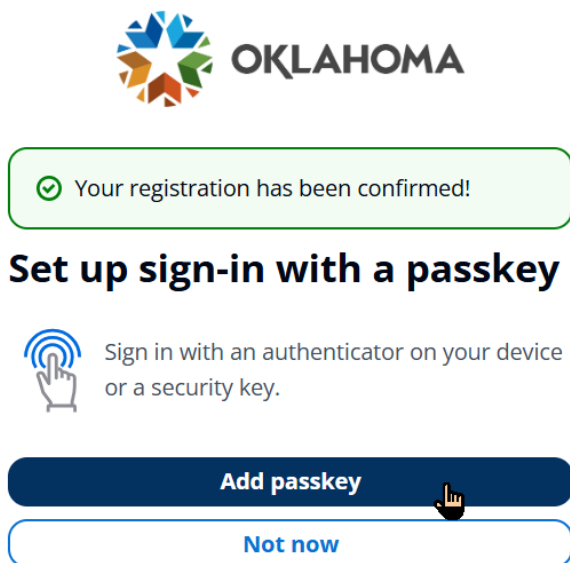


Figure 12 Passkey Creation via Google Password Manager

Users will have the option of creating a Passkey via Google, but it is not required.

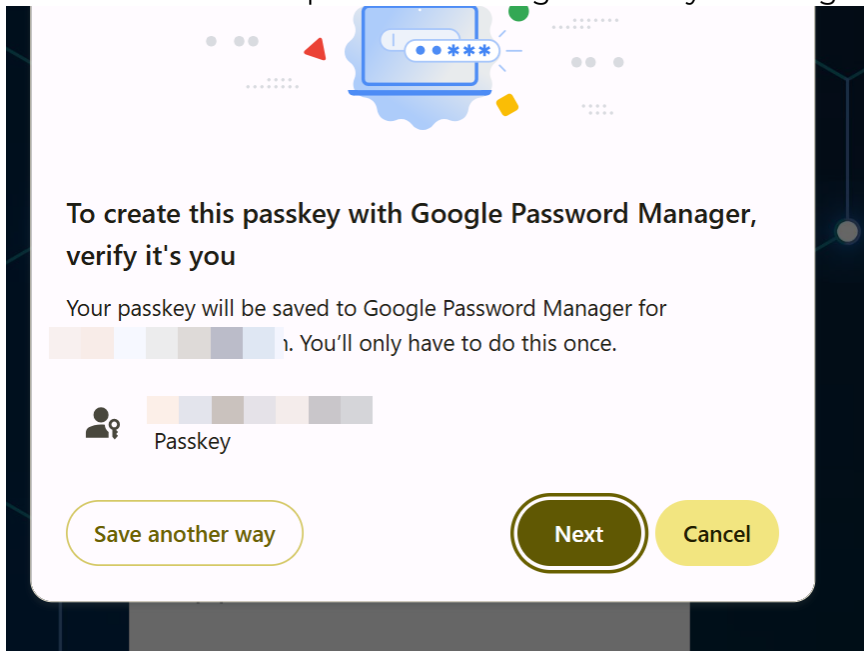
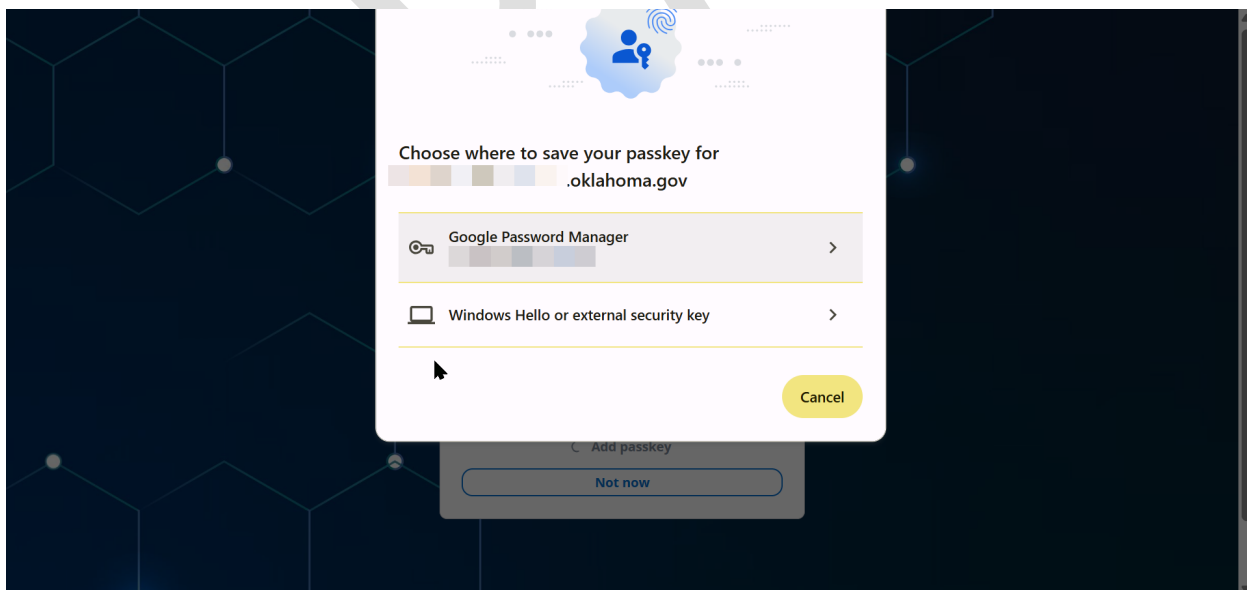


Figure 13 Passkey Setup



IV. Login

Figure 14 User Login

Returning users or users with newly created accounts can now login by selecting “Sign In.”

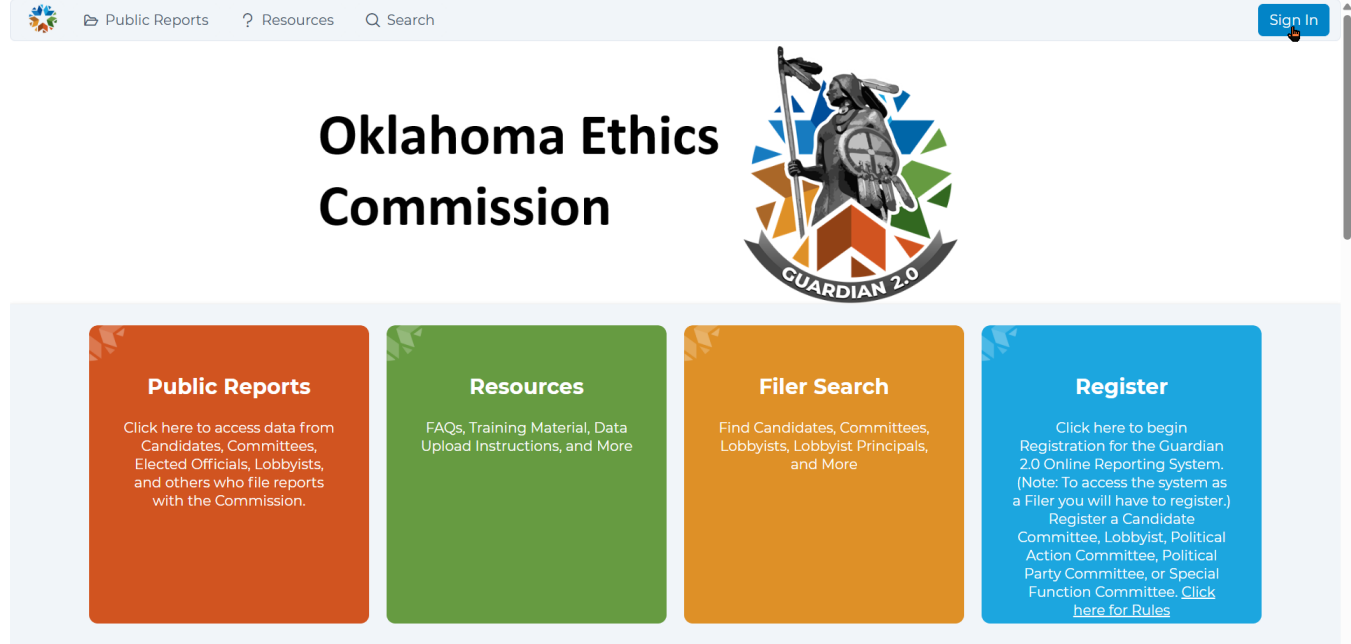
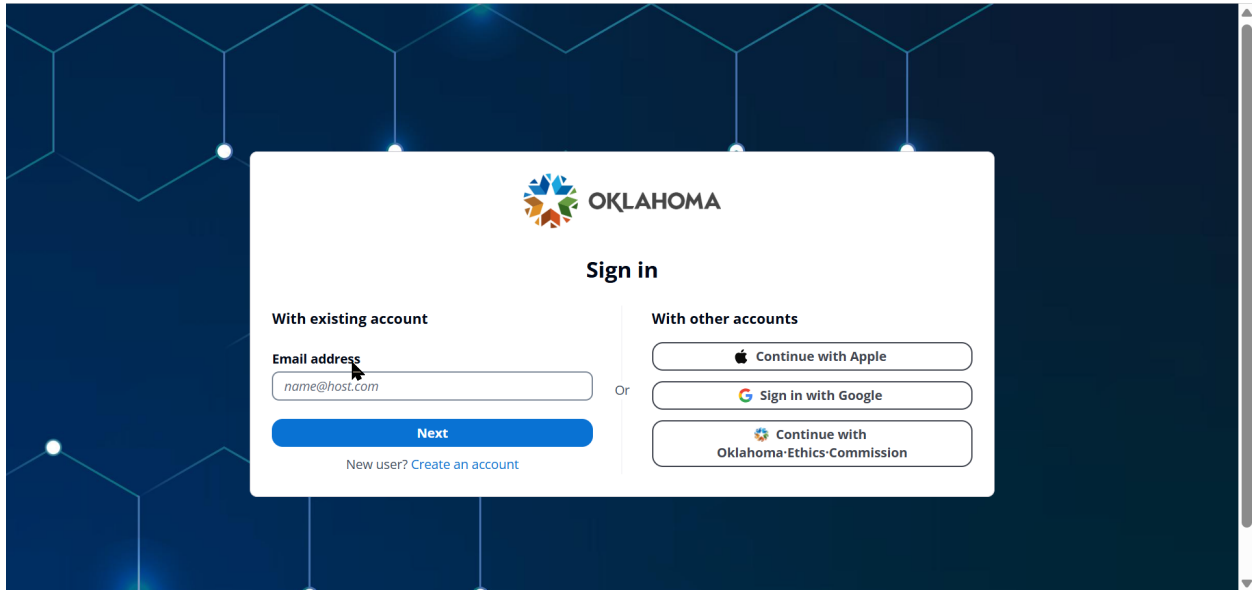


Figure 15 Login – Select Sign In

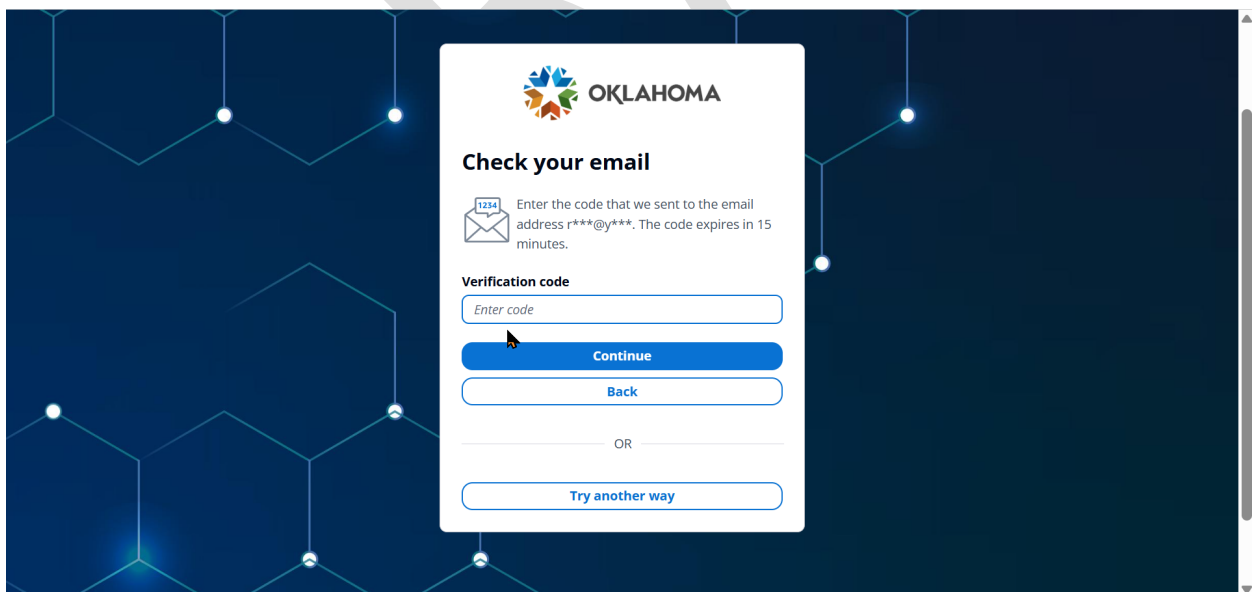


Figure 16 Existing Account Login Enter Email or select “Create an Account”



The screenshot shows the Oklahoma 'Sign in' page. At the top is the Oklahoma logo and the text 'OKLAHOMA'. Below this is the heading 'Sign in'. The page is divided into two main sections: 'With existing account' and 'With other accounts'. In the 'With existing account' section, there is a label 'Email address' above a text input field containing 'name@host.com'. Below the input field is a blue 'Next' button. A link 'New user? Create an account' is located below the 'Next' button. In the 'With other accounts' section, there are three buttons: 'Continue with Apple', 'Sign in with Google', and 'Continue with Oklahoma Ethics Commission'. The background is dark blue with a hexagonal pattern and glowing points.

Figure 17 Enter Emailed Verification Code



The screenshot shows the Oklahoma 'Check your email' page. At the top is the Oklahoma logo and the text 'OKLAHOMA'. Below this is the heading 'Check your email'. There is an icon of an envelope with a code '1234' and a message: 'Enter the code that we sent to the email address r***@y***. The code expires in 15 minutes.' Below this is a label 'Verification code' above a text input field with the placeholder 'Enter code'. Below the input field are two buttons: 'Continue' and 'Back'. Below these buttons is the text 'OR' and a button labeled 'Try another way'. The background is dark blue with a hexagonal pattern and glowing points.

Figure 18 Choose Other Sign-In Method

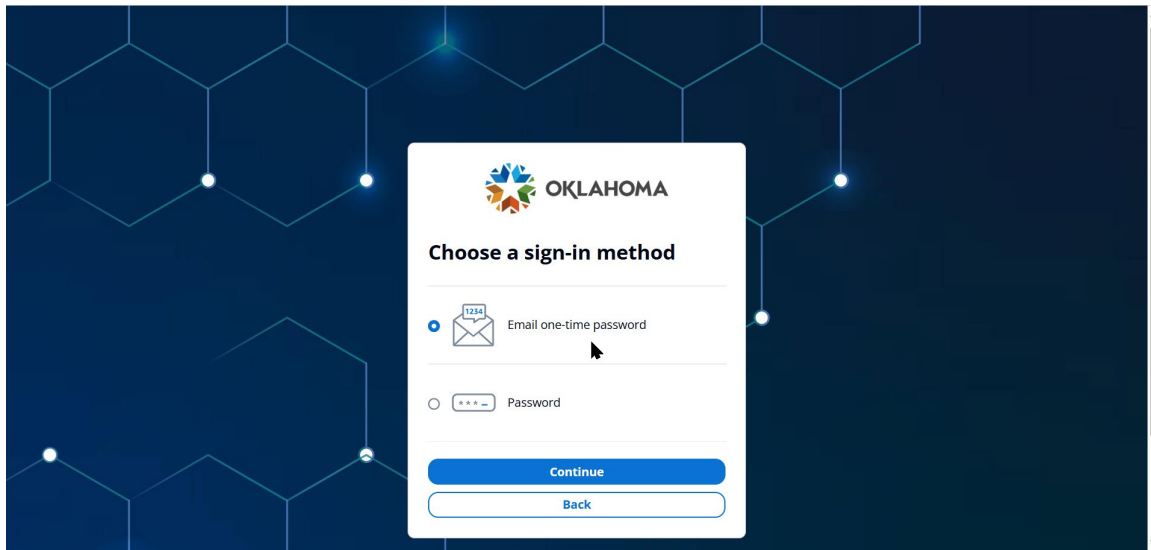


Figure 19 Choose Other Sign-In - Password

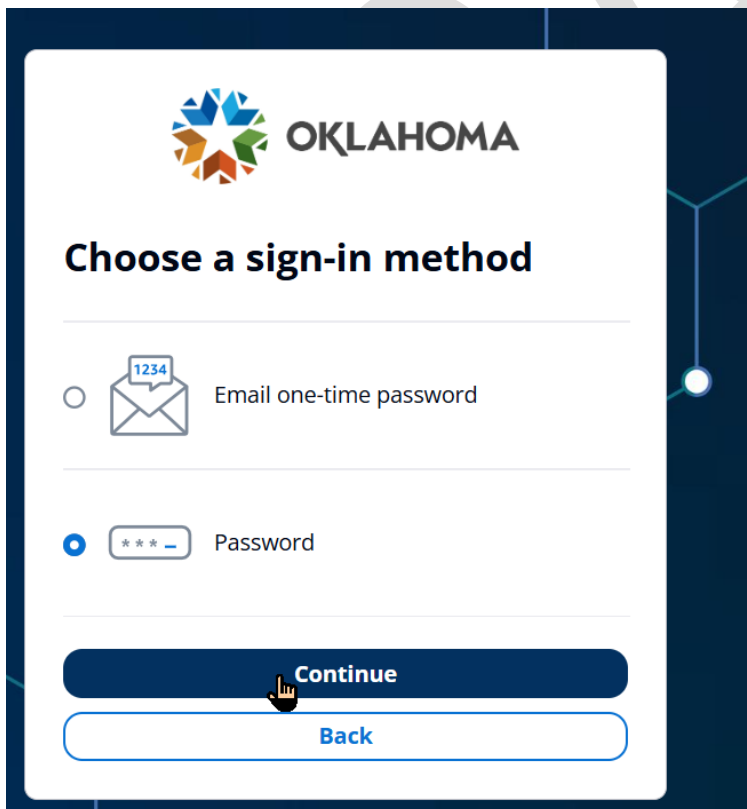


Figure 20 Password Entry - Enter Password

OKLAHOMA

Enter your password

Password

☐ Show password [Forgot your password?](#)

Continue

Back

Figure 21 Forgot Password - Enter Email

OKLAHOMA

Forgot your password?

Enter your email address. We will send a message with a code to reset your password.

Email address

name@host.com

Reset my password

Back

V. Registration

Figure 22 Guardian 2.0 System Registration Workflow

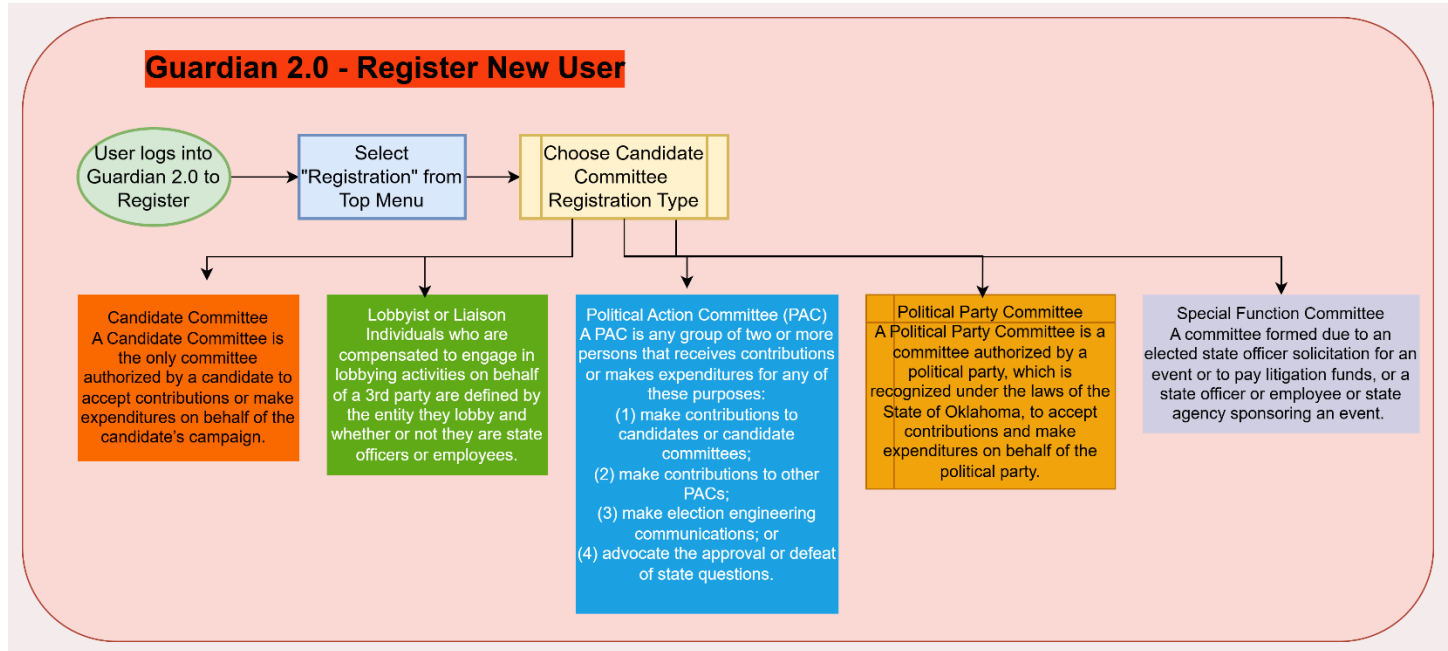




Figure 23 Select Registration Type

Note: Across each of the registration screens, users must select "Next/Save" to save their entries. Exiting any page or hitting "Previous" without saving causes the data to not be saved.

 Select Filer Registration

Welcome back,  5

REGISTRATION

Choose your registration type below

Candidate Committee

Every candidate for elective office has a Candidate Committee.

A Candidate Committee is the only committee authorized by a candidate to accept contributions or make expenditures on behalf of the candidate's campaign.

[see more](#)

Lobbyist or Liaison

Individuals who are compensated to engage in lobbying activities on behalf of a 3rd party are defined by the entity they lobby and whether or not they are state officers or employees.

[see more](#)

Political Action Committee

A PAC is any group of two or more persons that receives contributions or makes expenditures for any of these purposes.

- (1) make contributions to candidates or candidate committees;
- (2) make contributions to other PACs;
- (3) make electioneering communications; or
- (4) advocate the approval or defeat of state questions.

[see more](#)

Political Party Committee

A political party committee is a committee authorized by a political party, which is recognized under the laws of the State of Oklahoma, to accept contributions and make expenditures on behalf of the political party. Rule 2.2(16) and (17).

[see more](#)

Special Function Committee

A committee formed due to an elected state officer solicitation for an event or to pay litigation funds, or a state officer or employee or state agency sponsoring an event.

[see more](#)

Registration Menu

Figure 24 Registration Menu can be pinned to remain visible

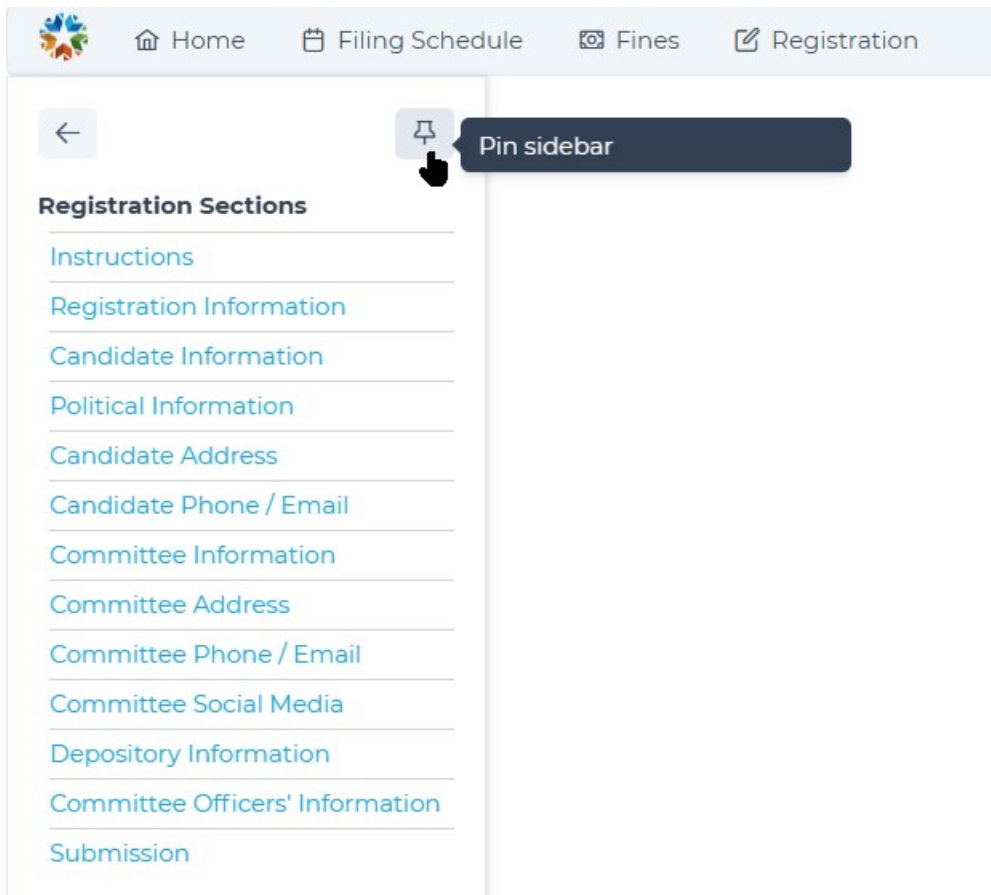
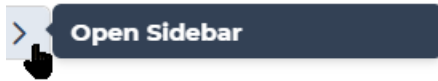
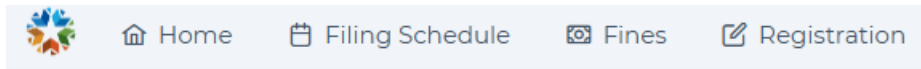


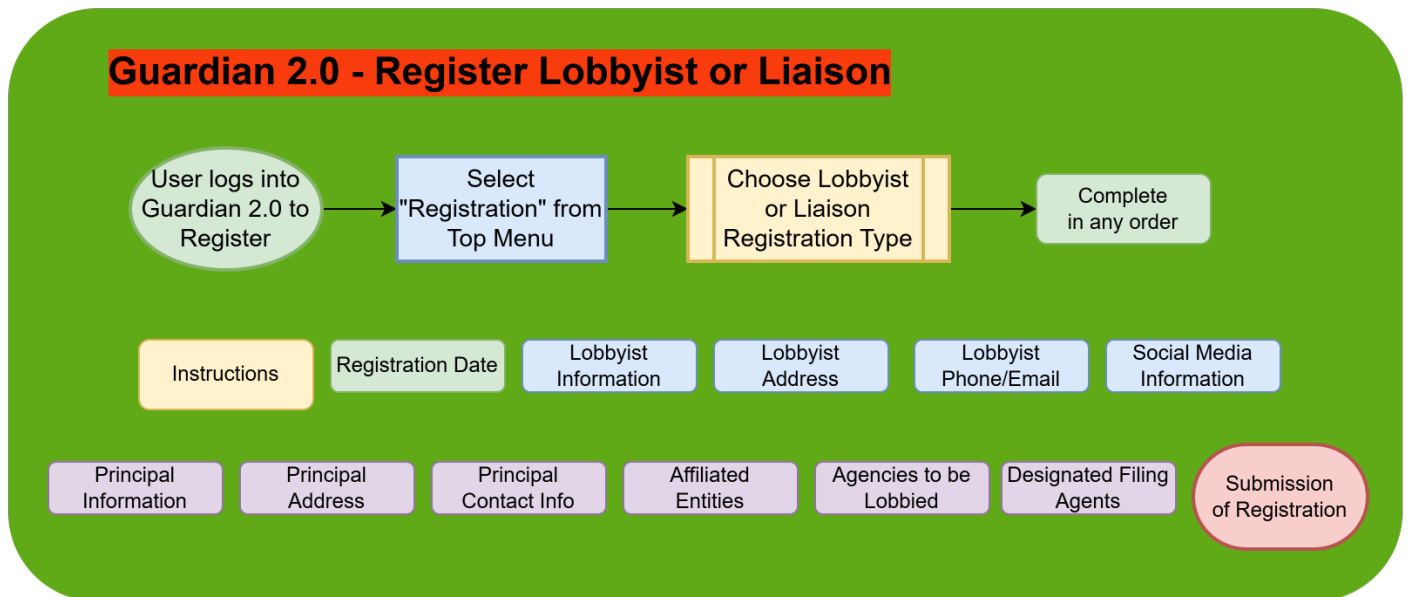
Figure 25 Registration Menu can be opened with Arrow



Lobbyist or Liaison

Individuals who are compensated to engage in lobbying activities on behalf of a third party are defined by the entity they lobby and whether they are state officers or employees. See [Lobbyist Guide](#) for more information.

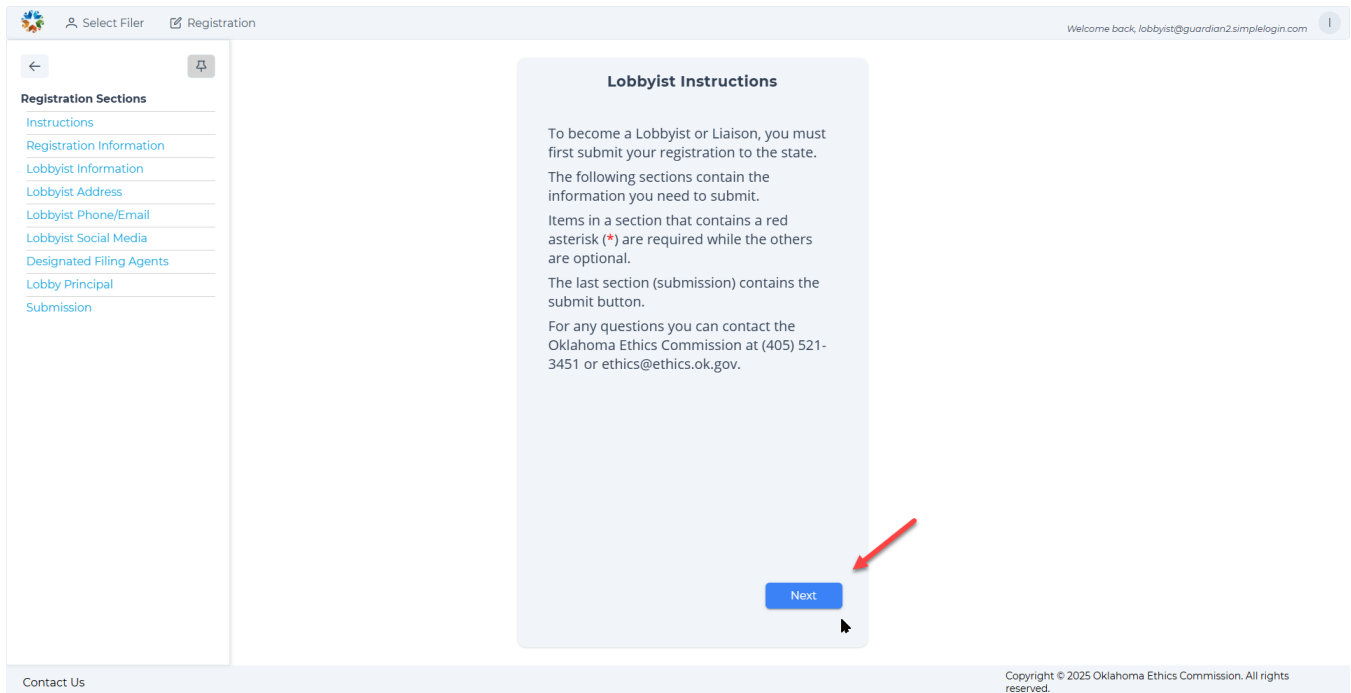
Figure 26 Guardian 2.0 Register Lobbyist or Liaison Workflow



Instructions

Figure 27 Lobbyist Instructions – Select Next or Jump to each item

Note: Across each of the registration screens, users must select "Next/Save" to save their entries. Exiting any page or hitting "Previous" without saving causes the data to not be saved.



Registration Information

Figure 28 Registration Information - Type and Year

Select Registration Type and the Registration Year and Select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

The screenshot shows the 'Registration Information' form in the Guardian 2.0 System Onboarding interface. The form is titled 'Registration Information' and contains two dropdown menus: 'Registration Type*' and 'Registration Year *'. The 'Registration Year' dropdown is currently set to '2025'. A red asterisk and the word 'Required' are displayed below the 'Registration Year' dropdown. A red arrow points to the 'Registration Type*' dropdown, and another red arrow points to the 'Next' button. The 'Previous' button is also visible. The form is part of a larger system with a sidebar on the left containing 'Registration Sections' and a top navigation bar with 'Select Filer' and 'Registration' links. The footer includes 'Contact Us' and 'Copyright © 2025 Oklahoma Ethics Commission. All rights reserved.'

Registration Information

Registration Type*

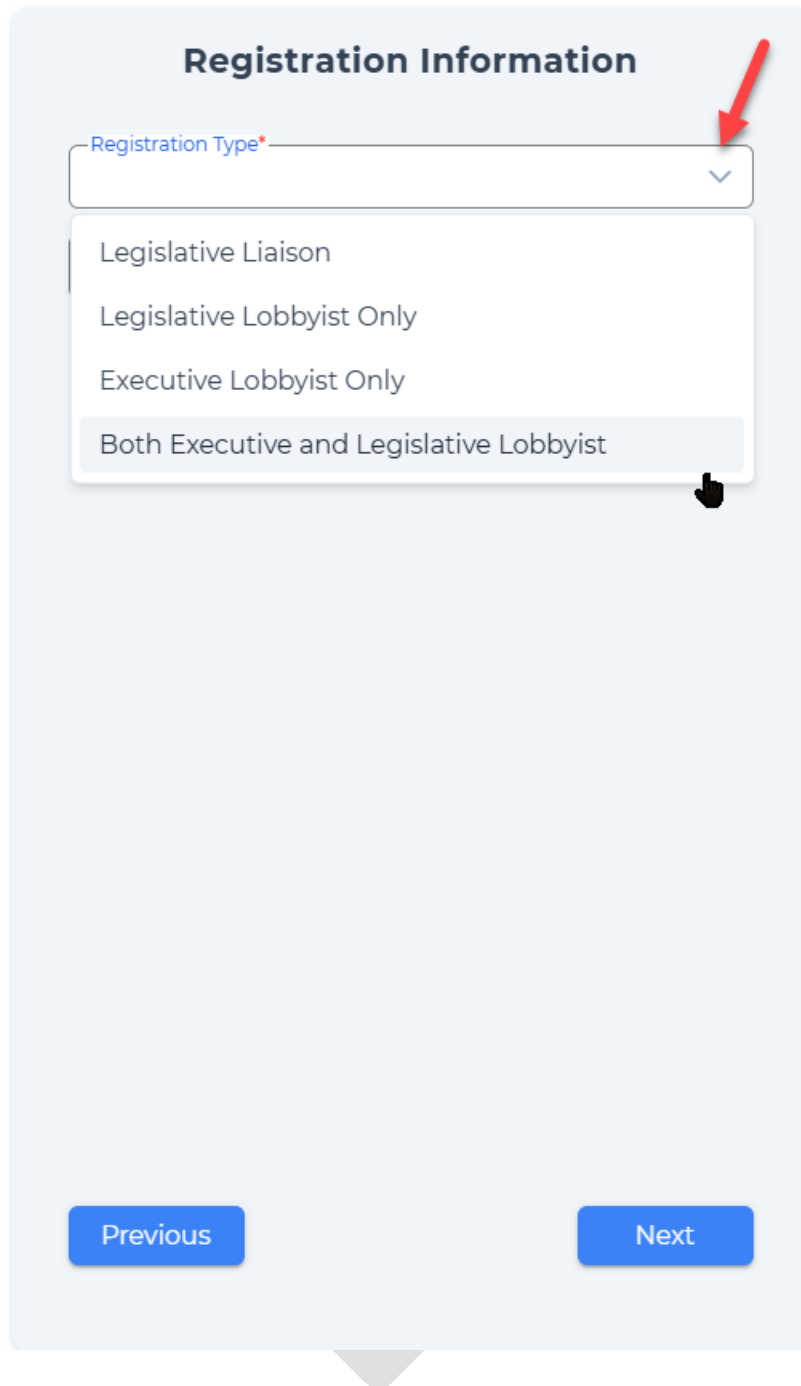
Registration Year *
2025

* Required

Previous Next

Figure 29 Registration Type Selection

Select the correct Registration Type. Once date and Type selected, select “Next/Save.”



The screenshot shows a light blue card titled "Registration Information". At the top, the title is in bold. Below it is a dropdown menu labeled "Registration Type*" in blue text. The dropdown is open, showing four options: "Legislative Liaison", "Legislative Lobbyist Only", "Executive Lobbyist Only", and "Both Executive and Legislative Lobbyist". A red arrow points to the dropdown arrow, and a black cursor points to the "Both Executive and Legislative Lobbyist" option. At the bottom of the card are two blue buttons: "Previous" and "Next".

Registration Information

Registration Type*

- Legislative Liaison
- Legislative Lobbyist Only
- Executive Lobbyist Only
- Both Executive and Legislative Lobbyist

Previous Next

Lobbyist Information

Figure 30 Lobbyist Information – Name

Complete the name information and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

Draft - Guardian 2.0 System Onboarding

This screenshot shows the 'Lobbyist Information' registration form. The form is titled 'Lobbyist Information' and contains the following fields: 'First Name*' (required), 'Middle Name', and 'Last Name*' (required). Below these fields is a checkbox labeled 'Name used when Lobbying, if different'. A red asterisk and the word 'Required' are positioned to the right of the checkbox. At the bottom of the form are two blue buttons: 'Previous' and 'Next'. Red arrows point to the 'First Name*' field and the 'Next' button. The left sidebar shows a list of 'Registration Sections' including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The top navigation bar includes 'Select Filer' and 'Registration' links. The footer contains 'Contact Us' and copyright information for the Oklahoma Ethics Commission.

Registration Sections

- Instructions
- Registration Information
- Lobbyist Information
- Lobbyist Address
- Lobbyist Phone/Email
- Lobbyist Social Media
- Designated Filing Agents
- Lobby Principal
- Submission

Lobbyist Information

First Name*

Middle Name

Last Name*

☐ Name used when Lobbying, if different

* Required

Previous Next

Contact Us

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Lobbyist Address

Figure 31 Lobbyist Address

Complete the Lobbyist Address and select “Next/Save.” Note: After entry, the “Next” button becomes “Next/Save.”

This screenshot shows the 'Lobbyist Address' registration form. The form is titled 'Lobbyist Address' and contains the following fields: 'Residence Address' (with sub-fields 'Address Line 1*' and 'Address Line 2'), 'City*', 'State*' (a dropdown menu currently showing 'Oklahoma'), and 'Postal Code*'. Below these fields is a checkbox labeled 'Mailing address is different than physical address'. A red asterisk and the word 'Required' are positioned to the right of the checkbox. At the bottom of the form are two blue buttons: 'Previous' and 'Next'. Red arrows point to the 'Address Line 1*' field and the 'Next' button. The left sidebar shows a list of 'Registration Sections' including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The top navigation bar includes 'Select Filer' and 'Registration' links. The footer contains 'Contact Us' and copyright information for the Oklahoma Ethics Commission.

Registration Sections

- Instructions
- Registration Information
- Lobbyist Information
- Lobbyist Address
- Lobbyist Phone/Email
- Lobbyist Social Media
- Designated Filing Agents
- Lobby Principal
- Submission

Lobbyist Address

Residence Address

Address Line 1*

Address Line 2

City*

State* Oklahoma

Postal Code*

☐ Mailing address is different than physical address

* Required

Previous Next

Contact Us

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Lobbyist Phone/Email

Figure 32 Lobbyist Phone / Email

Enter Lobbyist phone and/or email and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

The screenshot displays the 'Lobbyist Phone / Email' form within the Guardian 2.0 System Onboarding interface. The form is titled 'Lobbyist Phone / Email' and includes a note: 'At least one Phone Number and one Email is Required.' It features input fields for 'Phone Number *' and 'Extension', followed by a '+' button. Below these is an 'Email *' field, also followed by a '+' button. A red asterisk and the text '* Required' are positioned to the right of the email field. At the bottom of the form are two blue buttons: 'Previous' and 'Next'. Three red arrows point to the 'Phone Number *' field, the 'Email *' field, and the 'Next' button. The interface includes a top navigation bar with 'Select Filer' and 'Registration' links, a user greeting 'Welcome back, lobbyist@guardian2.simplelogin.com', and a footer with 'Contact Us' and copyright information for the Oklahoma Ethics Commission.

Lobbyist Social Media

Figure 33 Lobbyist Social Media

Enter Lobbyist social media details and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

The screenshot shows a web application interface for the Guardian 2.0 System Onboarding. At the top, there is a header bar with a logo, navigation links for "Select Filer" and "Registration", a welcome message "Welcome back, lobbyist@guardian2.simplelogin.com", and a user profile icon. The main content area features a "Social Media" registration form. This form includes a dropdown menu for "Social Media Type" and a text input field for "Social Media URL". Below these fields is a blue circular button with a white plus sign. At the bottom of the form are two blue buttons: "Previous" and "Next". Two red arrows point to the "Social Media Type" dropdown and the "Next" button. A small grey button with a right-pointing arrow is located to the left of the form. The footer contains a "Contact Us" link on the left and a copyright notice "Copyright © 2025 Oklahoma Ethics Commission. All rights reserved." on the right.

Social Media

Social Media Type

Social Media URL

+

Previous Next

Contact Us

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Designated Filing Agents

Figure 34 Designated Filing Agents

Users are provided the option of adding one or multiple Designated Filing Agents. If user decides to enter one or more Designated Filing Agents, enter their details and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

The screenshot shows the 'Designated Filing Agents' form within the Guardian 2.0 System Onboarding interface. The form is titled 'Designated Filing Agents' and contains the following fields: First Name, Middle Name, Last Name, Suffix (a dropdown menu), Phone Number, Extension, and Email. There are three red arrows pointing to the First Name field, the Extension field, and the 'Next' button. The 'Previous' button is also visible. The form is set against a light blue background. The top navigation bar includes a logo, 'Select Filer', 'Registration', and a welcome message 'Welcome back, lobbyist@guardian2.simplelogin.com'. The bottom footer contains 'Contact Us' and copyright information: 'Copyright © 2025 Oklahoma Ethics Commission. All rights reserved.'

Lobby Principal Information

Figure 35 Lobby Principal Information

A Lobbyist does not need a Lobby Principal, however if one is added, there are required fields shown in the applicable Sections. More than one Lobby Principal can be added.

Draft - Guardian 2.0 System Onboarding

The screenshot shows the "Lobbyist Principal" registration form. The form is titled "Lobbyist Principal" and includes a note: "More than one Lobbyist Principal can be added." The form is divided into three main sections: "Principal Information", "Address", and "Principal Contact Information". The "Principal Information" section contains a "Principal Type" dropdown menu. The "Address" section contains fields for "Address Line 1*", "Address Line 2", "City*", "State" (dropdown menu), and "Postal Code*". The "Principal Contact Information" section contains a "First Name*" field. At the bottom of the form are three buttons: "Previous", "Clear", and "Save/Next". Red arrows point to the "Principal Type" dropdown, the "Address" section, and the "Principal Contact Information" section.

Registration Sections

- Instructions
- Registration Information
- Lobbyist Information
- Lobbyist Address
- Lobbyist Phone/Email
- Lobbyist Social Media
- Designated Filing Agents
- Lobby Principal
- Submission

Lobbyist Principal

More than one Lobbyist Principal can be added.

Principal Information

Principal Type*

Address

Address Line 1*

Address Line 2

City*

State* Oklahoma

Postal Code*

Principal Contact Information

First Name*

Previous Clear Save/Next

State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System

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Figure 36 Principal Type

The first step in entering the Lobby Principal is to select the Principal Type. Select the type and continue to "Address."

The screenshot shows the "Lobbyist Principal" registration form with the "Principal Type" dropdown menu open. The dropdown menu displays two options: "State Agency" and "Business or Organization". Red arrows point to the dropdown menu and the "Business or Organization" option.

Registration Sections

- Instructions
- Registration Information
- Lobbyist Information
- Lobbyist Address
- Lobbyist Phone/Email
- Lobbyist Social Media
- Designated Filing Agents
- Lobby Principal
- Submission

Lobbyist Principal

More than one Lobbyist Principal can be added.

Principal Information

Principal Type*

State Agency

Business or Organization

Address

Address Line 1*

Address Line 2

City*

State* Oklahoma

Postal Code*

Principal Contact Information

First Name*

Previous Clear Save/Next

State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System

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Figure 37 Principal Entity Type Selection

Users should select if the Principal is registered with the Secretary of State or not, by selecting the correct “Entity Type.”

The screenshot displays the 'Lobbyist Principal' registration form. On the left is a sidebar with 'Registration Sections' including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The main form area is titled 'Lobbyist Principal' and includes a note: 'More than one Lobbyist Principal can be added.' The 'Principal Information' section contains the following fields: 'Principal Type*' (dropdown menu), 'Entity Type*' (dropdown menu), 'Secretary of State Registered Entity' (radio button), 'Non-Secretary of State Registered Entity' (radio button), 'SOSID*' (text field), 'Organization Name*' (text field), and 'Doing Business as' (text field). The 'Address' section is partially visible below. At the bottom are 'Previous', 'Clear', and 'Save/Next' buttons. Two red arrows point to the 'Entity Type*' dropdown menu. The footer shows 'State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System' and 'Copyright © 2025. All rights reserved.'

Figure 38 Principal Entity Search

Enter the Principal Entity Name to perform a search to identify the Secretary of State record for the entity.

The screenshot displays the 'Lobbyist Principal' registration form, similar to Figure 37. The 'Entity Type*' dropdown menu is now set to 'Non-Secretary of State Registered Entity'. A new 'Search Name' field has appeared with the placeholder text 'Enter Entity Name Here'. A 'Find Records' button is located below this field. Two red arrows point to the 'Search Name' field and the 'Find Records' button. The rest of the form and the footer are identical to Figure 37.

Figure 39 Search Results Selection

If a match is found based upon the search, select the matching entity.

The screenshot shows the 'Lobbyist Principal' registration form. A modal window titled 'Secretary of State Search Results' is open, displaying a table with search results. A red arrow points to the 'Select' button in the 'Action' column of the first row.

Entity Name	Registration Number	Action
[Redacted]	[Redacted]	Select
[Redacted]	[Redacted]	Select

The background form includes sections for 'Principal Information' (with dropdowns for Principal Type and Entity Type) and 'Address'. Navigation buttons at the bottom are 'Previous', 'Clear', and 'Save/Next'.

Figure 40 Lobby Principal Address

When deciding to add a Principal, a complete address must be entered. After entry, continue to "Principal Contact Information."

Draft - Guardian 2.0 System Onboarding

Lobbyist Principal

More than one Lobbyist Principal can be added.

v Address

Address Line 1*
Address Line 1 is required.

Address Line 2

City*

State*
Oklahoma

Postal Code*

v Principal Contact Information

First Name*

Middle Name

Previous Clear Save/Next

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Figure 41 Lobby Principal Contact Information

When a Principal is added, name and contact information must also be added. Complete the contact information and continue to “Affiliated Entities.”

Lobbyist Principal

More than one Lobbyist Principal can be added.

v Principal Contact Information

First Name*

Middle Name

Last Name*

Phone Number*
Extension

Email*

v Affiliated Entities

If appropriate, add Affiliated Entities to your Principal by choosing an Entity Type, adding details, then clicking "+".

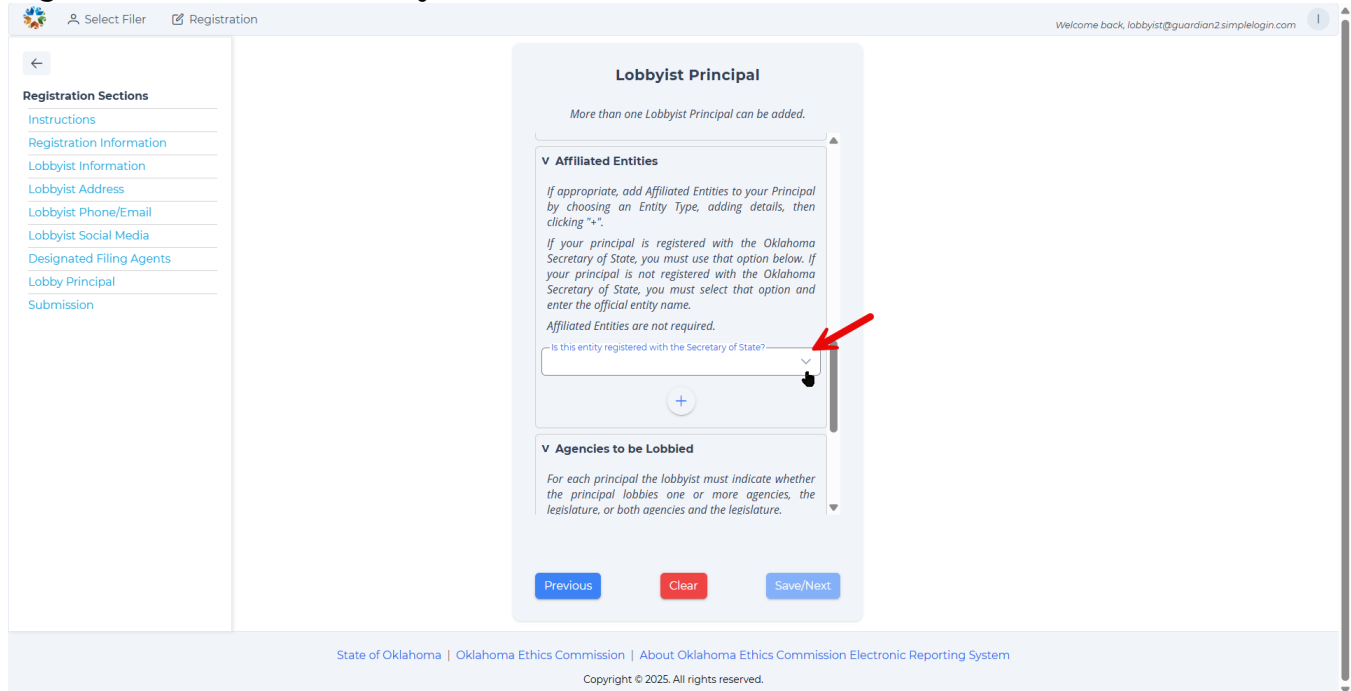
If your principal is registered with the Oklahoma Secretary of State, you must use that option below. If your principal is not registered with the Oklahoma

Previous Clear Save/Next

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Figure 42 Affiliated Entities

During Principal entry, the user must determine if the “Affiliated Entities” have been registered with the Secretary of State.



The screenshot displays the "Lobbyist Principal" registration form. On the left is a sidebar with "Registration Sections" including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The main form area has a header "Lobbyist Principal" and a note "More than one Lobbyist Principal can be added." Below this is the "V Affiliated Entities" section, which contains instructions on how to add entities and a question: "Is this entity registered with the Secretary of State?". A red arrow points to a dropdown menu for this question. Below the question is a "+" button to add more entities. The "V Agencies to be Lobbied" section follows, with instructions on indicating lobbied agencies. At the bottom are "Previous", "Clear", and "Save/Next" buttons. The footer includes "State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System" and "Copyright © 2025. All rights reserved."

Figure 43 Affiliated Entity Not Registered with Secretary of State

When adding an Affiliated Entity, if they are not registered with the Oklahoma Secretary of State, select the radial dial “No” and enter their name. Continue to complete the “Agencies to be Lobbied” section.

Draft - Guardian 2.0 System Onboarding

The screenshot shows the 'Lobbyist Principal' registration form. The left sidebar lists 'Registration Sections' including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The main form area is titled 'Lobbyist Principal' and includes a note: 'More than one Lobbyist Principal can be added.' Below this is the 'v Affiliated Entities' section, which contains instructions: 'If appropriate, add Affiliated Entities to your Principal by choosing an Entity Type, adding details, then clicking "+".' and 'If your principal is registered with the Oklahoma Secretary of State, you must use that option below. If your principal is not registered with the Oklahoma Secretary of State, you must select that option and enter the official entity name.' The dropdown 'Is this entity registered with the Secretary of State?' is set to 'No'. Below it is a text field for 'Entity Name*'. At the bottom of the form are buttons for 'Previous', 'Clear', and 'Save/Next'. The footer includes 'State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System' and 'Copyright © 2025. All rights reserved.'

Figure 44 Affiliated Entity Is Registered with Secretary of State

When adding an Affiliated Entity, if they are registered with the Oklahoma Secretary of State, select the radial dial “Yes” and enter their name. Select “Find Records.”

The screenshot shows the 'Lobbyist Principal' registration form with the 'Affiliated Entities' section. The dropdown 'Is this entity registered with the Secretary of State?' is now set to 'Yes'. Below it is a text field for 'Search Entity Name' and a 'Find Records' button. Below that is a text field for 'Secretary of State Registration Number*'. At the bottom of the form are buttons for 'Previous', 'Clear', and 'Save/Next'. The footer is the same as the previous screenshot.

Figure 45 Affiliated Entity Find Record with Secretary of State

When adding an Affiliated Entity, enter their name and select “Find Records” to search the Oklahoma Secretary of State records.

The screenshot shows the 'Lobbyist Principal' form in the Guardian 2.0 system. The left sidebar lists 'Registration Sections' including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The main form area is titled 'Lobbyist Principal' and includes a note: 'More than one Lobbyist Principal can be added.' Below this is the 'v Affiliated Entities' section. It contains instructions: 'If appropriate, add Affiliated Entities to your Principal by choosing an Entity Type, adding details, then clicking "+".' and 'If your principal is registered with the Oklahoma Secretary of State, you must use that option below. If your principal is not registered with the Oklahoma Secretary of State, you must select that option and enter the official entity name.' Below the instructions is a dropdown menu 'Is this entity registered with the Secretary of State?' with 'Yes' selected. Below the dropdown is a 'Search Entity Name' input field and a 'Find Records' button. Two red arrows point to the 'Find Records' button and the 'Search Entity Name' input field. Below the input field is a 'Secretary of State Registration Number*' field. At the bottom of the form are 'Previous', 'Clear', and 'Save/Next' buttons. The footer of the page reads 'State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System' and 'Copyright © 2025. All rights reserved.'

Figure 46 Affiliated Entity Record found with Secretary of State

When adding an Affiliated Entity, after selecting “Find Records,” if user finds the affiliated entity, they will select the record which now displays in the “Secretary of State Registration Number” and Secretary of State Entity Name” fields. Additional Affiliated Entities can be added by selecting the Plus symbol. If found and entry of Affiliated Entities is complete, continue to the “Agencies to be Lobbied” section. If the record is not found and does not exist as registered with Oklahoma Secretary of State, change the selection to “No” for “Is this entity is registered with Secretary of State.”

The screenshot shows the 'Lobbyist Principal' registration form. A modal titled 'Secretary of State Search Results' is open, displaying a table with search results. Two red arrows point to the 'Select' buttons in the 'Action' column of the table.

Entity Name	Registration Number	Action
OKLAHOMA DEPARTMENT OF REVENUE		Select
OKLAHOMA DEPARTMENT OF REVENUE		Select

The background form includes sections for 'Affiliated Entities', 'Secretary of State Registration Number', and 'Secretary of State Public Name'. Navigation buttons at the bottom are 'Previous', 'Clear', and 'Save/Next'.

Figure 47 Agencies to be Lobbied

During Principal entry, the user will enter the State Agencies to be Lobbied. Select the "Agency Type" and enter the "Agency Name" to complete this section. If additional agencies are lobbied, select the Plus symbol to add. When this Principal entry is complete, if additional Principals to add, select the "Save and Add Another Principal." When Principal entry is complete, select "Save/Next." Continue to the "Submission" section.

The screenshot shows the 'Lobbyist Principal' registration form. The 'Agencies to be Lobbied' section is highlighted with a red box. Two red arrows point to the 'Agency Type' and 'Agency Name' dropdown menus. A green button labeled 'Save and Add Another Principal' is visible below the dropdowns.

Agencies to be Lobbied

For each principal the lobbyist must indicate whether the principal lobbies one or more agencies, the legislature, or both agencies and the legislature.

For each principal choose the agency or legislature and then select the name of the agency from the "Name" dropdown box and click "Add to List".

Continue adding to the list until all agencies to be lobbied on behalf of the principal have been selected.

Agency Type*
State Agency

Agency Name*

Save and Add Another Principal

Navigation buttons at the bottom are 'Previous', 'Clear', and 'Save/Next'.

Submission

Figure 48 Sign and Submit Registration

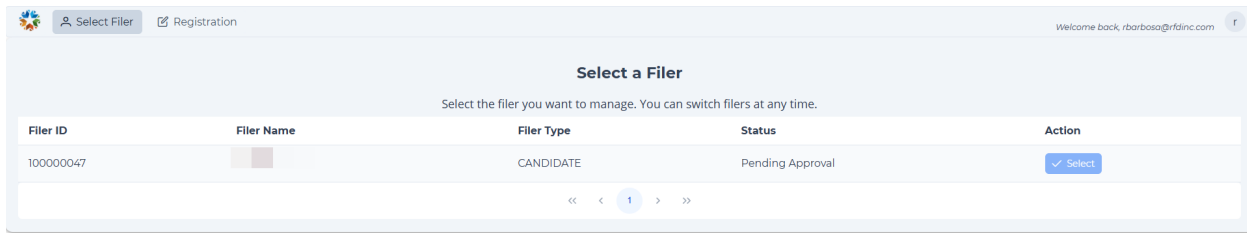
To submit the registration, users must acknowledge the accuracy of the submission by selection the check box, entering their name, and selecting "Submit." Once the registration has been submitted, a member of the Oklahoma Ethics Commission will review the entry for approval. The registration must be approved prior to entering transactions or filing reports.

The screenshot displays the 'Submission' form within the Guardian 2.0 system. The form is titled 'Submission' and contains a checkbox for acknowledgment, a text field for 'Lobbyist Name', and 'Cancel' and 'Submit' buttons. A 'Previous' button is at the bottom. Red arrows point to the checkbox, the text field, and the 'Submit' button. The left sidebar shows 'Registration Sections' with links to Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobby Principal, and Submission. The top navigation bar includes 'Select Filer' and 'Registration'. The footer includes 'Contact Us' and 'Copyright © 2025 Oklahoma Ethics Commission. All rights reserved.'

Registrations Awaiting Approval

Figure 49 Pending Registrations

Once the registration has been submitted, a member of the Oklahoma Ethics Commission will review the entry for approval. The registration must be approved prior to entering transactions or filing reports. The status can be viewed via the "Select Filer" screen.



VI. Filing Expenditures

Figure 50 Approved Registration(s) Selection

Logging in after registering allows users to select which registered filer to work under. This list may contain registered and in progress registrations depending on the user's account.

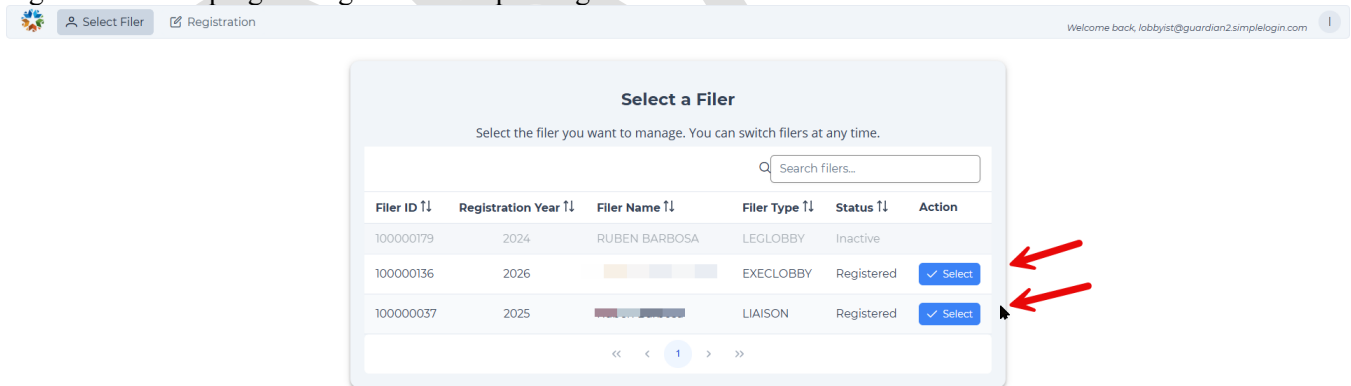


Figure 51 Filing Reports Option

Lobbyists can select this option to view, file, or amend expenditure reports for the selected registration.

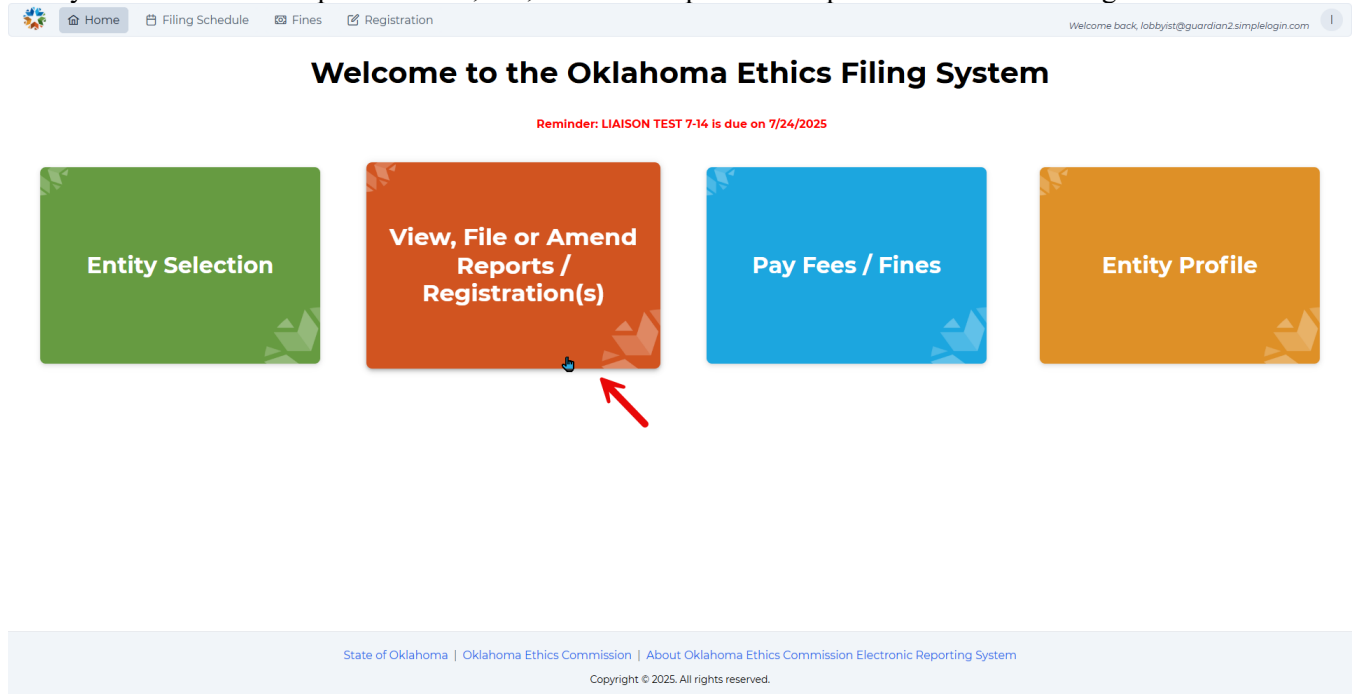


Figure 52 Start Work on New Filing Event

When a user is first assigned a report, the option to start work allows them to begin reporting activities.

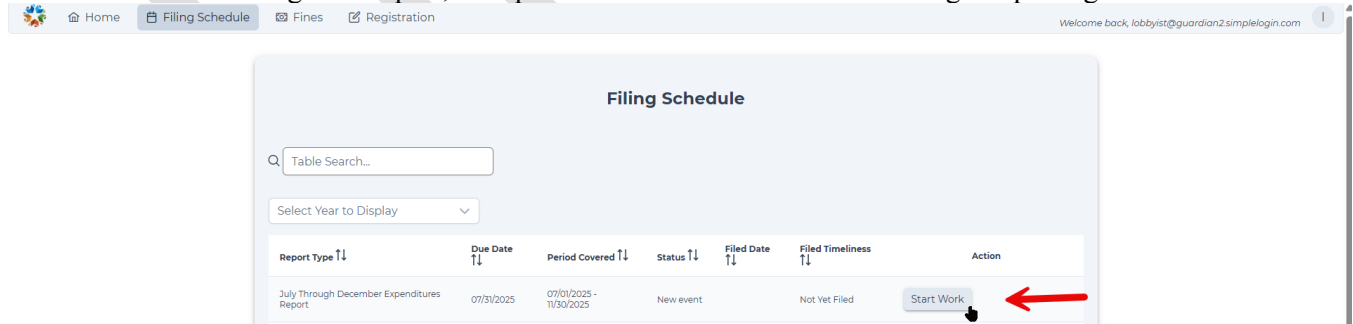


Figure 53 Begin Work Filing Expenditures

Users should select the type of activity they wish to report from the distinct types of expenditures.

Draft - Guardian 2.0 System Onboarding

The screenshot displays the Guardian 2.0 System Onboarding interface. The top navigation bar includes links for Home, Filing Schedule, Fines, and Registration. The user is logged in as 'lobbyist@guardian2.simplelogin.com'. The main content area shows the 'Cover Page' section with a sidebar on the left containing various expenditure categories. Two red arrows point to the 'Lobbyist or Liaison Expenditures' and 'Lobby Principal Expenditures' categories. The main content area displays a table with the following information:

Filer Information	Report Name	Period Covered	Report Due Date
[Placeholder]	July Through December Expenditures Report	07/01/2025 - 11/30/2025	11/30/2025

Below the table, there is a question: "Do you have Activity to report for this period?" with radio buttons for "No" and "Yes".

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Figure 54 Complete the Expenditure Activity

Fill in each of the fields based upon the type of expenditures selected and “Save” the record.

The screenshot displays the Guardian 2.0 System Onboarding interface, specifically the 'Gifts to Family Member of State Office or Employee' form. The sidebar on the left shows the 'Gifts to Family Members' category selected. The main content area displays the form with the following fields:

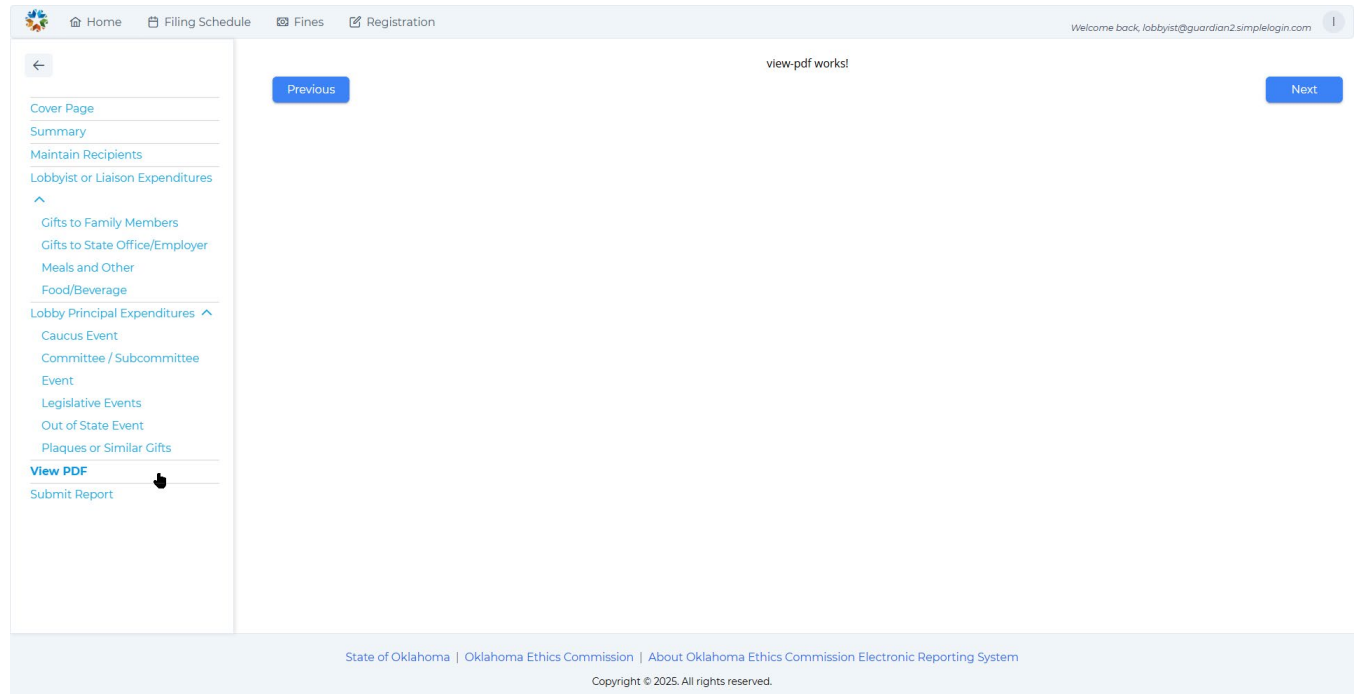
- * Required**
- Expenditure Date ***: 07/14/2025
- Recipient Information**: Type *
- Expenditure Cost ***
- Explanation ***

At the bottom of the form, there are buttons for 'Cancel' and 'Save'.

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Figure 55 View PDF Screen Is Still Being Developed

While this screen is still being developed, Users can go directly to the “Submit Report” screen found on the left navigation sidebar.



Submitting Expenditure Reports

Figure 56 Submit Report to Preview or Submit and Esign

Users can select “Preview PDF” or “Submit & Esign”.

Draft - Guardian 2.0 System Onboarding

Home Filing Schedule Fines Registration Welcome back, lobbyist@guardian2.simplelogin.com

←

Cover Page
Summary
Maintain Recipients
Lobbyist or Liaison Expenditures
Gifts to Family Members
Gifts to State Office/Employer
Meals and Other
Food/Beverage
Lobby Principal Expenditures
Caucus Event
Committee / Subcommittee
Event
Legislative Events
Out of State Event
Plaques or Similar Gifts
View PDF
Submit Report

Complete filing with e-signature

Important: Please ensure all information is accurate before e-signing.

- Your PDF document will be sent to this email : [redacted]@m
- To complete your filing, please e-sign the document.
- Once you e-sign, the document will be submitted to the Ethics Commission for review.
- Note:** If you need to make changes after you click the Submit button below, please cancel the signing agreement by opening the e-sign document in your email and click on the "Document Status" button.

Preview PDF Submit & Esign

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Figure 57 Complete Esign of PDF

User can select to “Complete Esign” which opens the PDF document and they are then able to sign the PDF electronically or selecting options, they can also decline if it was not complete/accurate.

Home Filing Schedule Fines Registration Welcome back, lobbyist@guardian2.simplelogin.com

←

Cover Page
Summary
Maintain Recipients
Lobbyist or Liaison Expenditures
Gifts to Family Members
Gifts to State Office/Employer
Meals and Other
Food/Beverage
Lobby Principal Expenditures
Caucus Event
Committee / Subcommittee
Event
Legislative Events
Out of State Event
Plaques or Similar Gifts
View PDF
Submit Report

Complete filing with e-signature

Important: Please ensure all information is accurate before e-signing.

- Your PDF document will be sent to this email : [redacted]@m
- To complete your filing, please e-sign the document.
- Once you e-sign, the document will be submitted to the Ethics Commission for review.
- Note:** If you need to make changes after you click the Submit button below, please cancel the signing agreement by opening the e-sign document in your email and click on the "Document Status" button.

Esign

Current Document status : Out For Signature

E-sign Instructions

Please check your email: [redacted] for e-signing this document OR Click the button below to complete e-sign.

Complete Esign Document Status


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Figure 58 View and Esign PDF

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[DEMO USE ONLY]

Options | Q | ? |



OKLAHOMA ETHICS COMMISSION
PHONE: (405) 521-3451 • FAX: (405) 521-4905 • WEBSITE: WWW.OK.GOV/ETHICS

LOBBYIST OR LIAISON EXPENDITURE REPORT

AMENDED: NO

Full Legal Name (Last, First, Middle): [REDACTED] Ethics Number: 1([REDACTED])

Lobbyist or Liaison: [REDACTED] Reporting Period: 07/01/2022 - 11/30/2022 Year: [REDACTED]

☒ **Verification of information on Registration.** I acknowledge that the information contained in my *Lobbyist or Liaison Registration Form* is true and correct as of the date of filing this report and incorporated as a part of this report.

☒ **Other Lobbyist Reporting.** Some, or all, expenditures are reported by another lobbyist or liaison. Schedule 4 is attached identifying the lobbyist(s) or liaison(s) reporting the expenditure(s).

☒ **FINAL REPORT.** This report terminates my lobbyist or liaison registration in the state of Oklahoma. This final report includes all remaining expenditures I am required to report under the laws of Oklahoma. I understand that to engage in lobbying in Oklahoma in the future (including within the same year) I will be required to register.

Lobbyist or Liaison Expenditures Summary:

Types of Expenditures:	Reporting period total	Year to date total
Meals and Other Food and Beverage for Individuals [Schedule 1]	\$0.00	\$0.00
Other Gifts for Individuals [Schedule 2]	\$0.00	\$0.00
Lobbyist or Liaison Reported Expenditure Total:	\$0.00	\$0.00

Lobbyist Principal's Expenditures Summary (Note these totals may include multiple lobbyist principals).

Types of Expenditures:	Reporting period total	Year to date total
Plaques or Similar Gift [Schedule 2]	\$0.00	\$0.00
Events for All Members of the Legislature [Schedule 3]	\$0.00	\$0.00
Caucus Events [Schedule 3]	\$0.00	\$0.00
Committee or Subcommittee Events [Schedule 3]	\$0.00	\$0.00

1 required field remaining

Figure 59 Click to Sign PDF

Powered by **Adobe Acrobat Sign**

[DEMO USE ONLY]

Options | Q | ? |

Acrobat Sign Test Document

Types of Expenditures:	Reporting period total	Year to date total
Meals and Other Food and Beverage for Individuals [Schedule 1]	\$0.00	\$0.00
Other Gifts for Individuals [Schedule 2]	\$0.00	\$0.00
Lobbyist or Liaison Reported Expenditure Total:	\$0.00	\$0.00

Lobbyist Principal's Expenditures Summary (Note these totals may include multiple lobbyist principals).

Types of Expenditures:	Reporting period total	Year to date total
Plaques or Similar Gift [Schedule 2]	\$0.00	\$0.00
Events for All Members of the Legislature [Schedule 3]	\$0.00	\$0.00
Caucus Events [Schedule 3]	\$0.00	\$0.00
Committee or Subcommittee Events [Schedule 3]	\$0.00	\$0.00
Conferences, Seminars or Similar Meetings [Schedule 3]	\$0.00	\$0.00
Lobbyist or Liaison Reported Expenditures Total:	\$0.00	\$0.00

By signing, electronic or otherwise, my name below, I acknowledge that the information submitted is complete, true and accurate, as of the date submitted. I understand the failure to provide such information is a violation of the Ethics Rules of Oklahoma. I understand that I can update the information above at any time by filing an amended Continuing Report of Contributions.

Date Submitted: [REDACTED] Officer Signature: [REDACTED] **Click to Sign**

Signed On: Jul 15, 2025 Signature: *** Click to Sign**

Filing Date: [REDACTED] Printing Date: 7/15/2025 3:57:28 PM Page: 1/1

1 required field remaining

Figure 60 PDF Options to Decline and Other Options

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Acrobat Sign

[DEMO USE ONLY]

OKLAHOMA ETHICS COMMISSION
PHONE: (405) 521-3401 • FAX: (405) 521-4955 • WEBSITE: WWW.OK.GOV/ETHICS

LOBBYIST OR LIAISON EXPENDITURE REPORT

AMENDED: NO

Full Legal Name (Last, First, Middle): [REDACTED] Ethics Number: 100000037

Lobbyist or Liaison: [REDACTED] Reporting Period: 07/01/2022 - 11/30/2022 Year: [REDACTED]

☒ **Verification of information on Registration.** I acknowledge that the information contained in my *Lobbyist or Liaison Registration Form* is true and correct as of the date of filing this report and incorporated as a part of this report.

☒ **Other Lobbyist Reporting.** Some, or all, expenditures are reported by another lobbyist or liaison. Schedule 4 is attached identifying the lobbyist(s) or liaison(s) reporting the expenditure(s).

☒ **FINAL REPORT.** This report terminates my lobbyist or liaison registration in the state of Oklahoma. This final report includes all remaining expenditures I am required to report under the laws of Oklahoma. I understand that to engage in lobbying in Oklahoma in the future (including within the same year) I will be required to register.

Lobbyist or Liaison Expenditures Summary:

Types of Expenditures:	Reporting period total	Year to date total
Meals and Other Food and Beverage for Individuals [Schedule 1]	\$0.00	\$0.00
Other Gifts for Individuals [Schedule 2]	\$0.00	\$0.00
Lobbyist or Liaison Reported Expenditure Total:	\$0.00	\$0.00

Lobbyist Principal's Expenditures Summary (Note these totals may include multiple lobbyist principals).

Types of Expenditures:	Reporting period total	Year to date total
Plaques or Similar Gift [Schedule 2]	\$0.00	\$0.00
Events for All Members	\$0.00	\$0.00
Caucus Events	\$0.00	\$0.00
Committee or Subcommittee Events [Schedule 3]	\$0.00	\$0.00

1 required field remaining

Options

- Decline to sign
- Delegate signing to another
- Download PDF
- View document history
- Report abuse