

Oklahoma Ethics Commission



Oklahoma Ethics Commission Guardian 2.0 System Onboarding Guide Candidate Committee

v.2025.1

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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.

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 with 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

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 to 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.

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

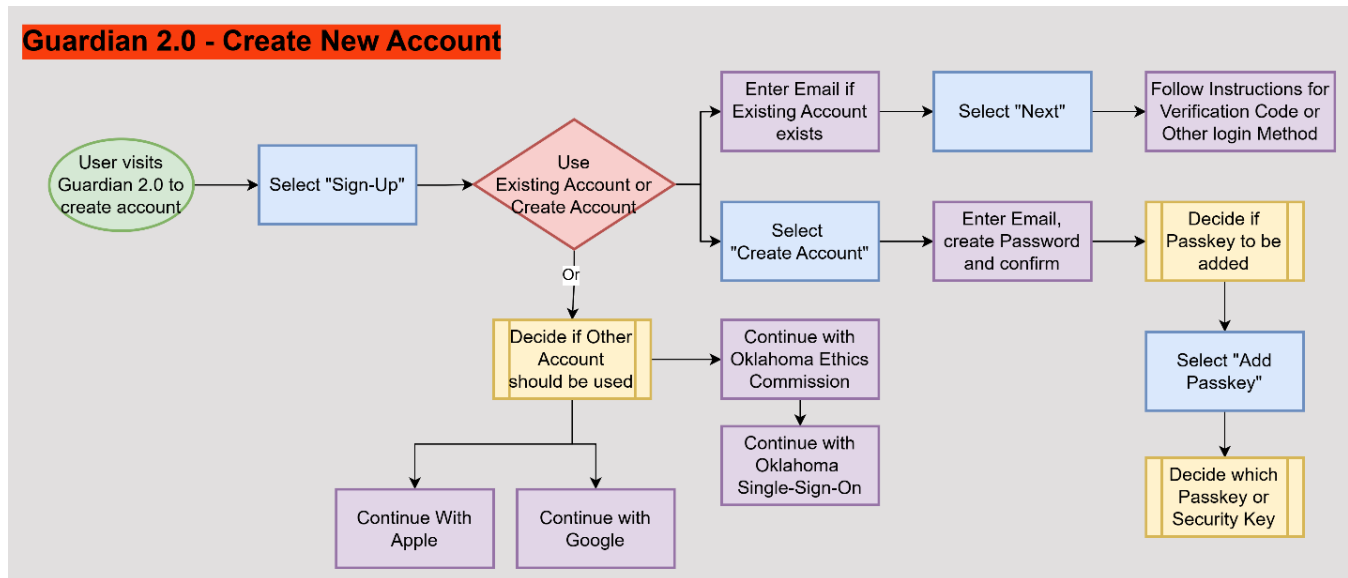


Figure 2 The Guardian 2.0 Landing Page

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.

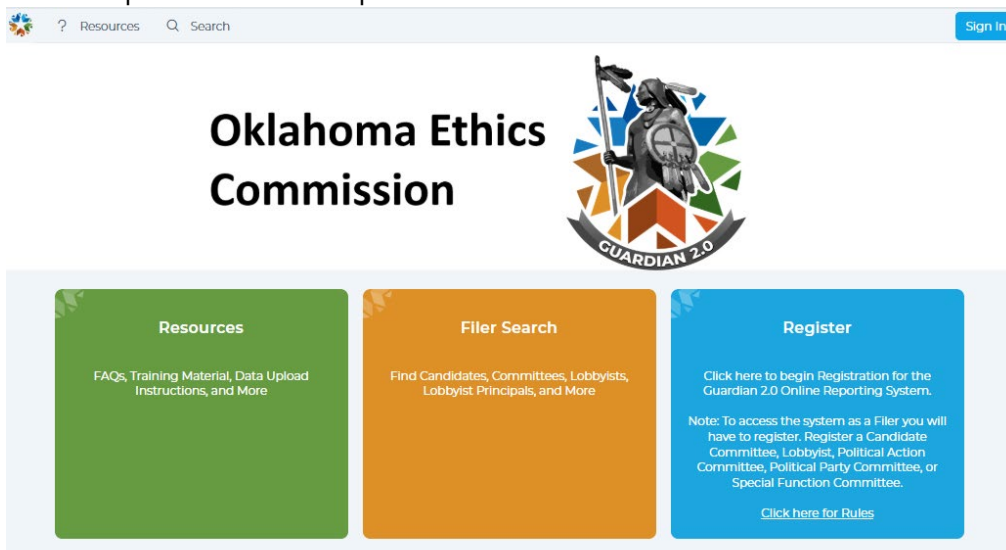
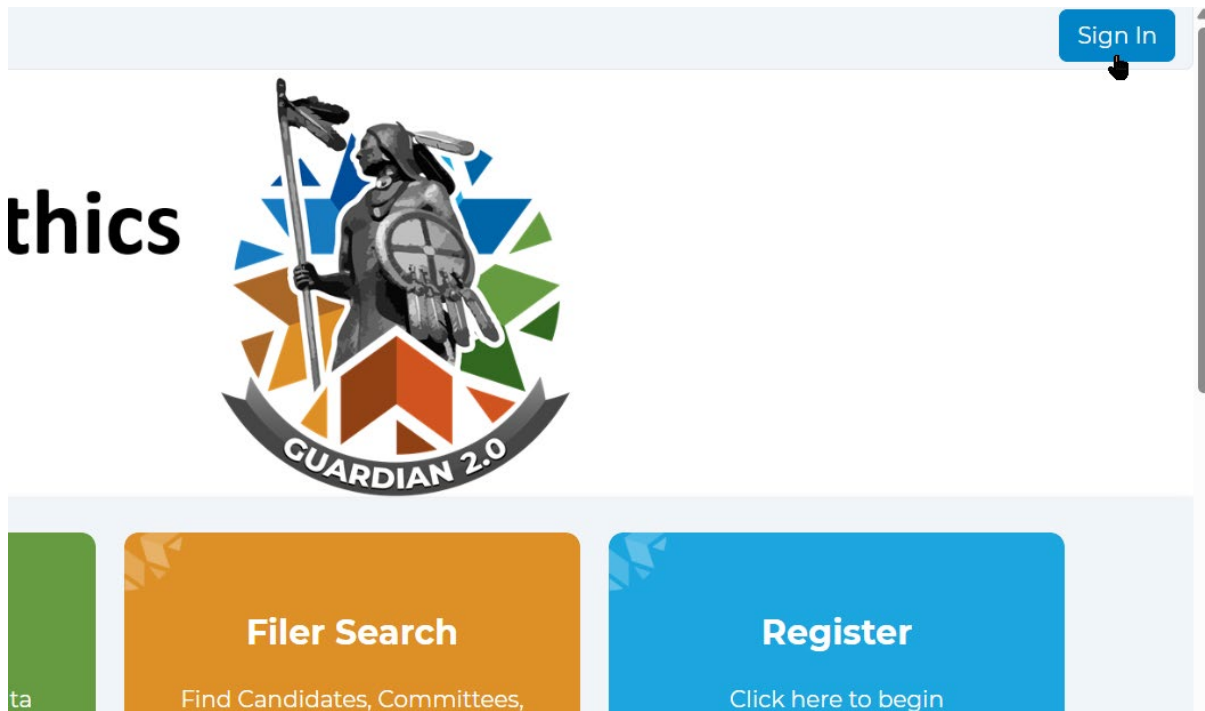


Figure 3 Select Sign In to Create Account*Figure 4 Enter Email to Create Account*

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.

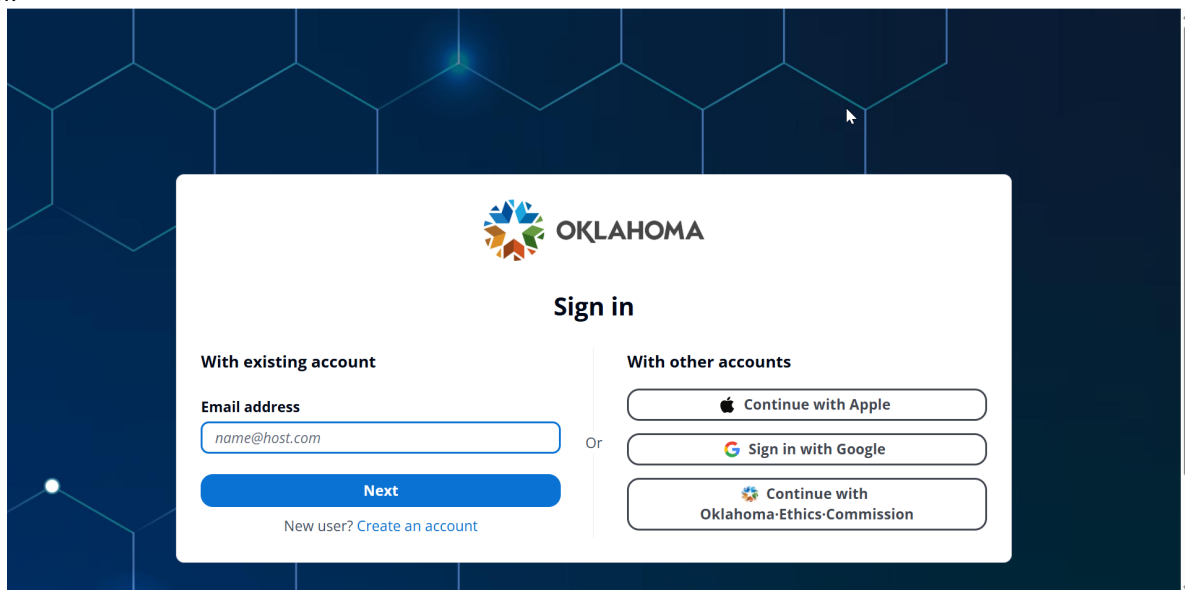



Figure 5 Select Create Account

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

 **OKLAHOMA**

Sign in

With existing account

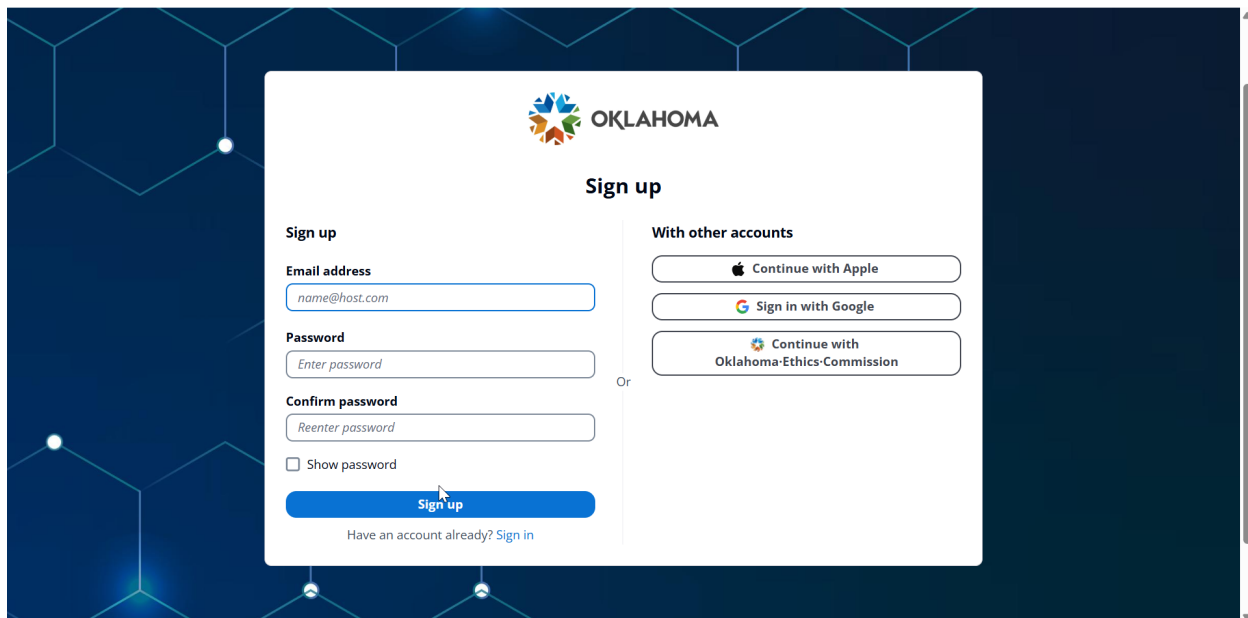
Email address

Next

New user? [Create an account](#)

With new account

Figure 6 Create Password and Confirm

 **OKLAHOMA**

Sign up

Sign up

Email address

Password


Confirm password


☐ Show password

Sign up

Have an account already? [Sign in](#)

With other accounts

 Continue with Apple

 Sign in with Google


 Continue with Oklahoma Ethics Commission

Figure 7 Follow Password Rules & Figure 8 Sign Up Selection After Password Entry and Confirmation

The screenshot displays the OKLA Sign up interface. On the left, the 'Sign up' section includes an 'Email address' field and a 'Password' field. Below the password field, five green checkmarks list the password requirements: 'Password must be at least 8 characters', 'Use a number', 'Use a lowercase letter', 'Use an uppercase letter', and 'Use a symbol'. An 'Or' separator is positioned between the left and right panels. The right panel also features a 'Sign up' section with 'Email address' and 'Password' fields. Below the password field, the same five password rules are listed. A 'Confirm password' field is present, followed by a 'Show password' checkbox. At the bottom, a dark blue 'Sign up' button is highlighted with a mouse cursor, and a link 'Have an account already? Sign in' is located below it.

Figure 9 & 10 Optional Passkey Addition & Selection

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

The screenshot shows the OKLA passkey setup screen. At the top, the OKLAHOMA logo is displayed. A green confirmation message states 'Your registration has been confirmed!'. Below this, the heading 'Set up sign-in with a passkey' is shown. An icon of a hand using an authenticator is accompanied by the text 'Sign in with an authenticator on your device or a security key.' Two buttons are provided: a blue 'Add passkey' button and a white 'Not now' button. A mouse cursor is pointing at the 'Add passkey' button.

Figure 7 Passkey Creation via Google Password Manager

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

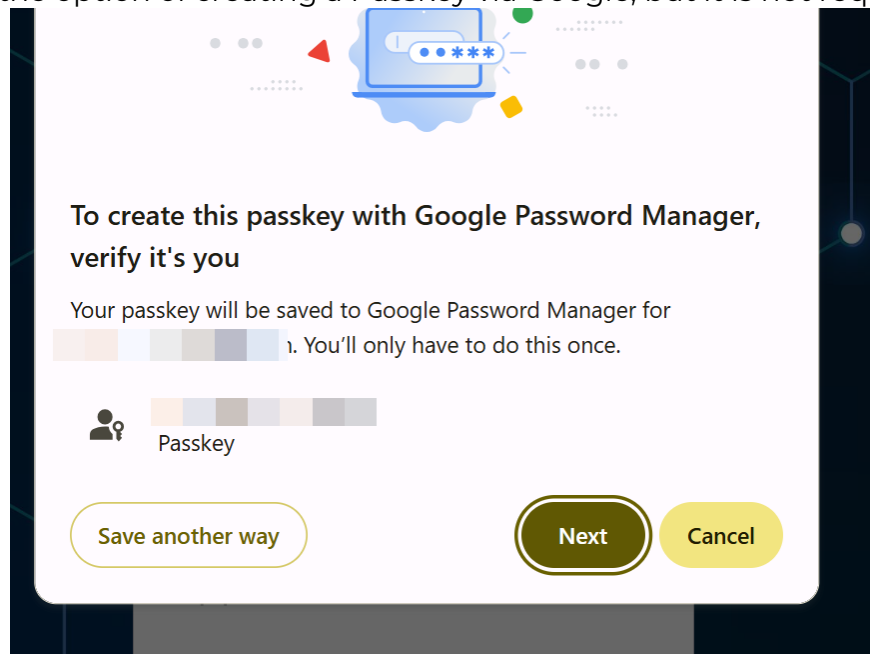
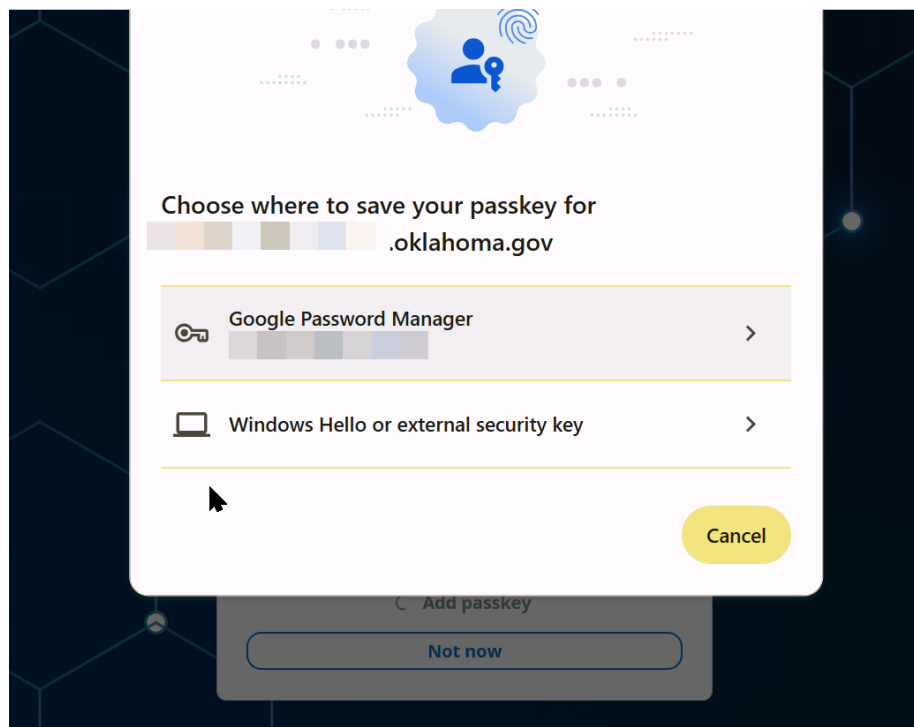


Figure 8 Passkey Setup



IV. Login

Figure 9 User Login

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



Figure 10 Login – Select Sign In

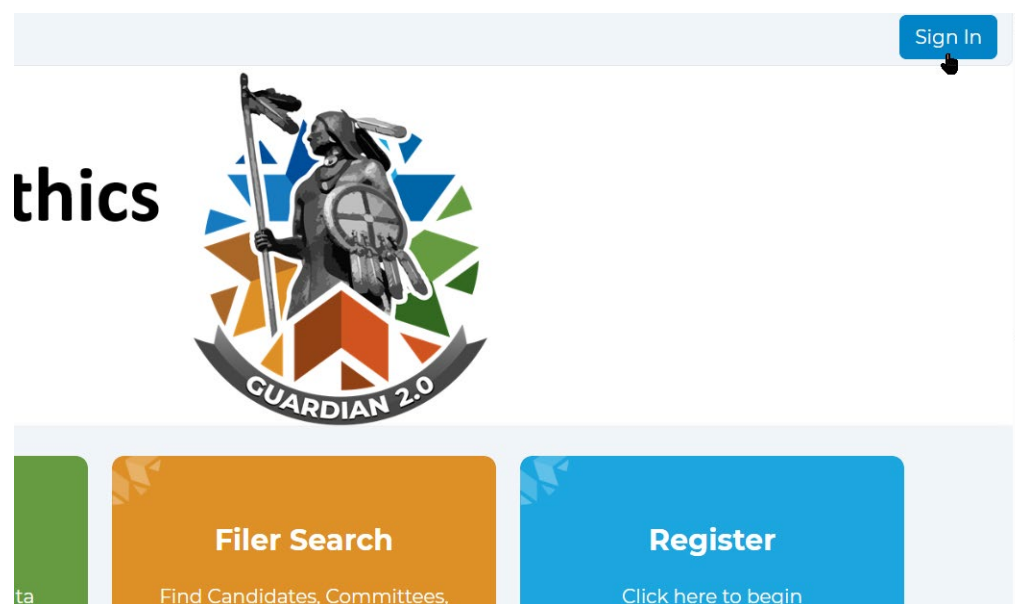


Figure 11 Existing Account Login Enter Email or select “Create an Account”

OKLAHOMA

Sign in

With existing account

Email address

name@host.com

Next

New user? [Create an account](#)

With other accounts

Continue with Apple

Sign in with Google

Continue with Oklahoma Ethics Commission

Figure 12 Enter Emailed Verification Code or Figure 18 Choose other Sign-in Method

OKLAHOMA

Check your email

Enter the code that we sent to the email address r***@y***. The code expires in 15 minutes.

Verification code

Enter code

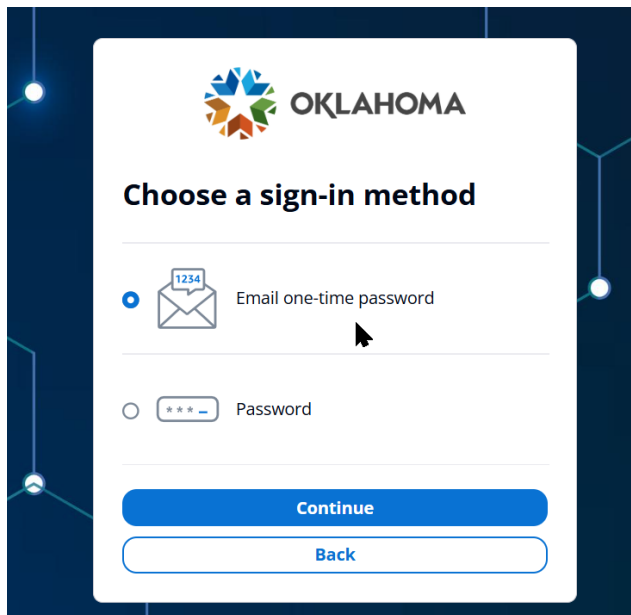
Continue

Back

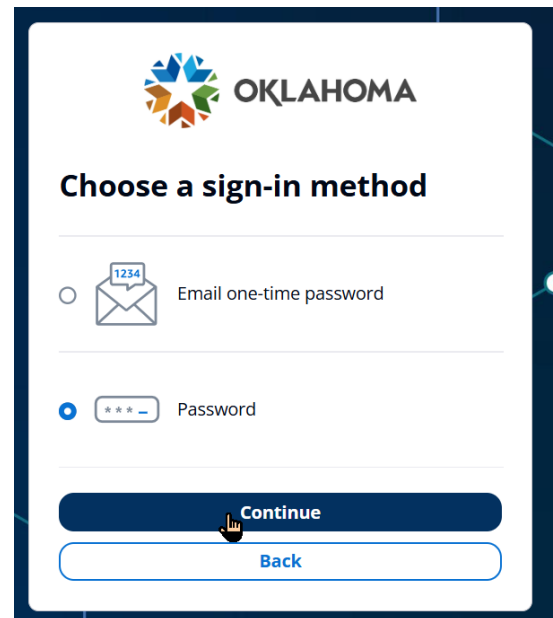
OR

Try another way

Figure 13 Choose Other Sign-In Method or Figure 14 Choose Other Sign-In - Password



The screenshot shows the 'Choose a sign-in method' screen for the OKLAHOMA system. At the top is the OKLAHOMA logo. Below it, the title 'Choose a sign-in method' is displayed. There are two options: 'Email one-time password' (selected with a blue radio button and an envelope icon with '1234') and 'Password' (unselected with a grey radio button and a password field icon). At the bottom are two buttons: 'Continue' (blue) and 'Back' (white with a blue border).

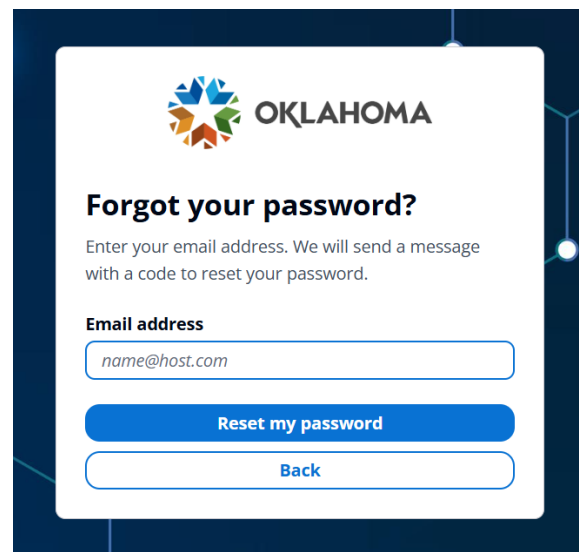


The screenshot shows the 'Choose a sign-in method' screen for the OKLAHOMA system. At the top is the OKLAHOMA logo. Below it, the title 'Choose a sign-in method' is displayed. There are two options: 'Email one-time password' (unselected with a grey radio button and an envelope icon with '1234') and 'Password' (selected with a blue radio button and a password field icon). At the bottom are two buttons: 'Continue' (blue) and 'Back' (white with a blue border).

Figure 15 Password Entry - Enter Password & Figure 16 Forgot Password - Enter Email



The screenshot shows the 'Enter your password' screen for the OKLAHOMA system. At the top is the OKLAHOMA logo. Below it, the title 'Enter your password' is displayed. There is a 'Password' label above a text input field containing eight dots. Below the input field are two links: 'Show password' (with a checkbox) and 'Forgot your password?'. At the bottom are two buttons: 'Continue' (blue) and 'Back' (white with a blue border).



The screenshot shows the 'Forgot your password?' screen for the OKLAHOMA system. At the top is the OKLAHOMA logo. Below it, the title 'Forgot your password?' is displayed. Underneath is a sub-header 'Enter your email address. We will send a message with a code to reset your password.' followed by an 'Email address' label and a text input field containing 'name@host.com'. At the bottom are two buttons: 'Reset my password' (blue) and 'Back' (white with a blue border).

V. Registration

Figure 17 Guardian 2.0 System Registration Workflow

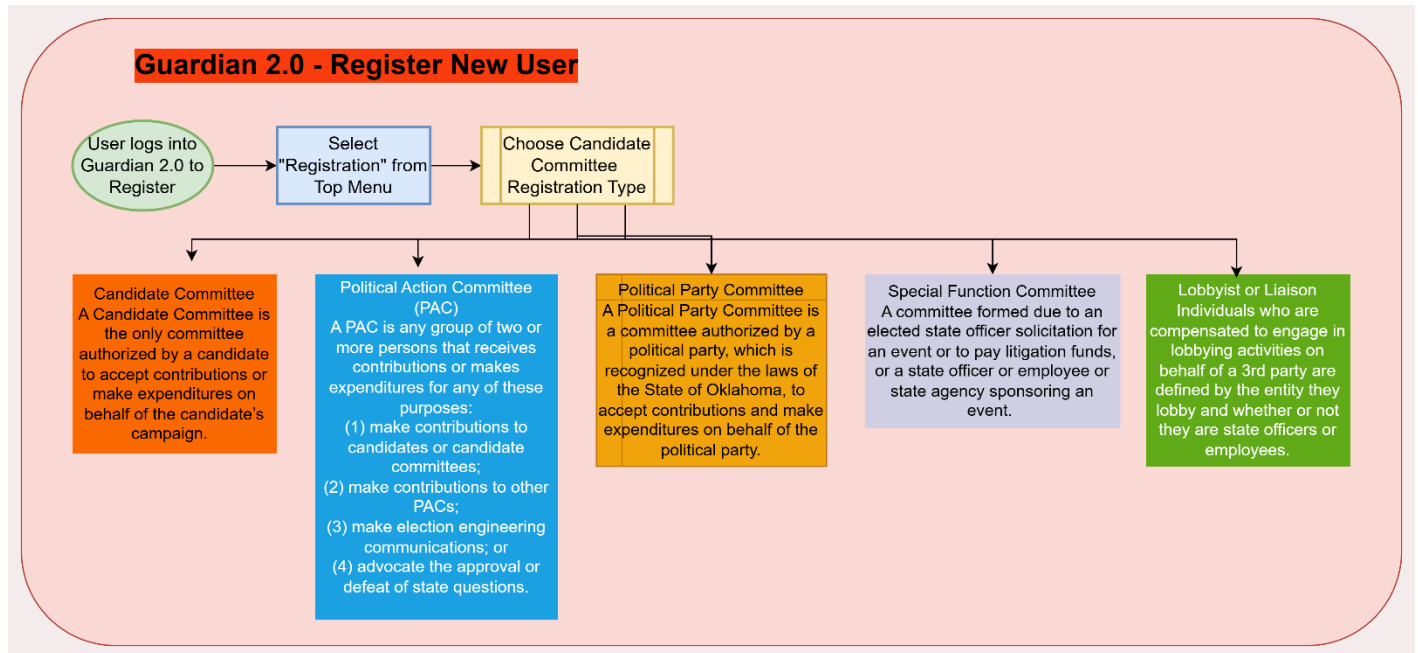
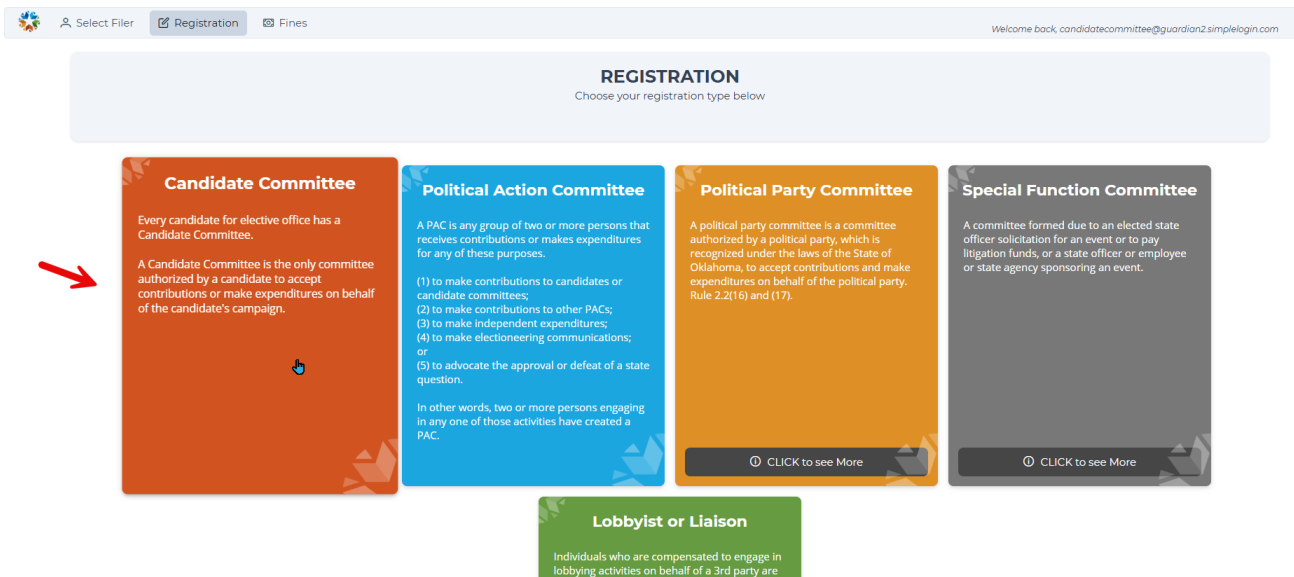


Figure 18 Select Registration Type

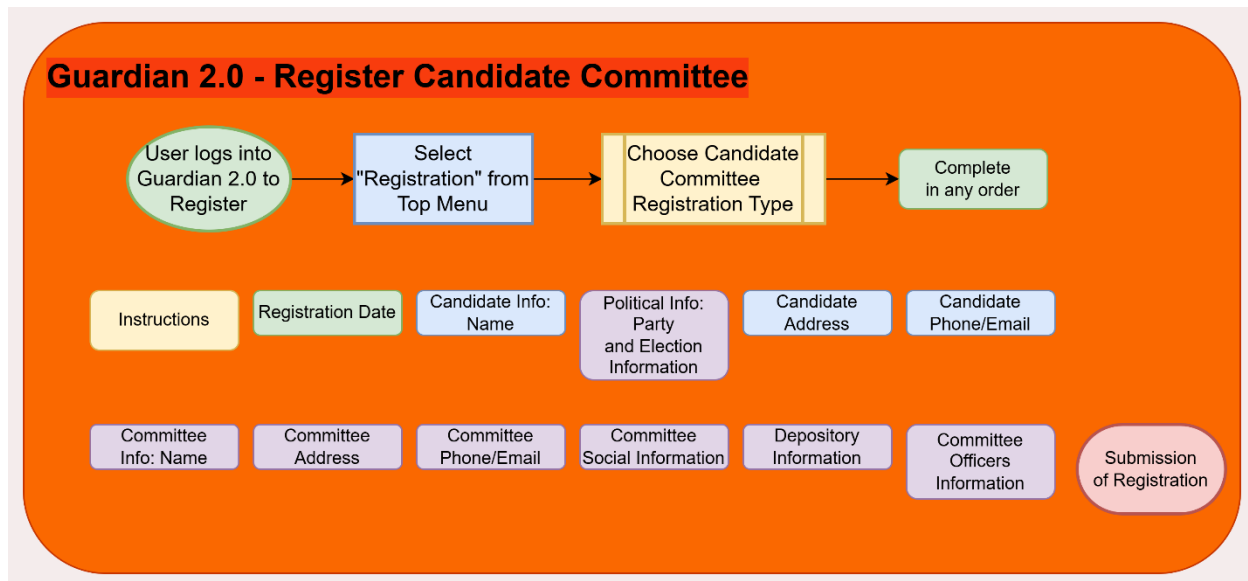
Note: Across each of the registration screens, users must select “Next/Save” to save their entries. Exiting any page or hitting “Previous” without saving causes the data to not be saved.



Candidate Committee Selection

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 [Candidate Guide](#) for more information.

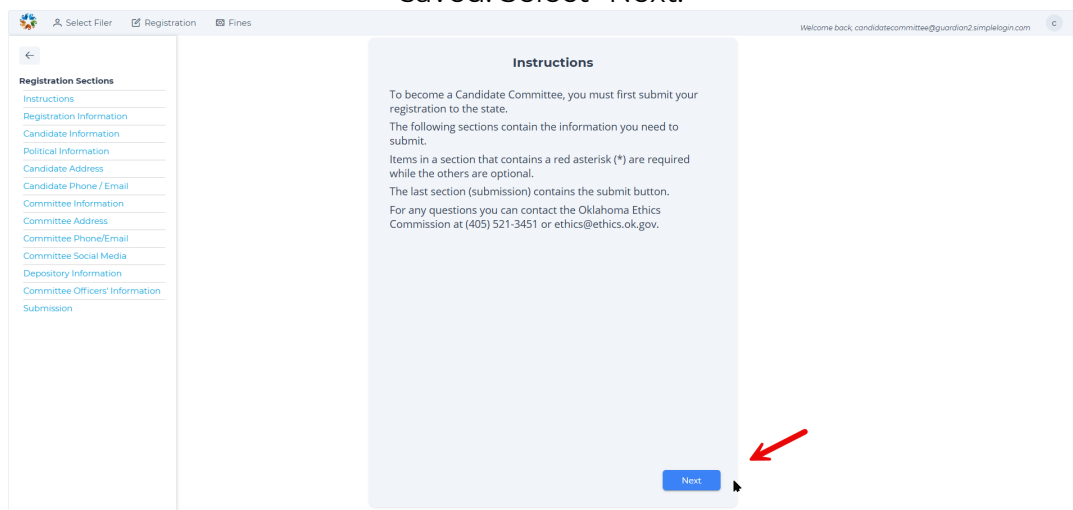
Figure 19 Guardian 2.0 Register Candidate Committee Workflow



Instructions

Figure 20 Candidate Committee 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. Select “Next.”



Registration Information

Figure 21 Candidate Committee - Registration Information

Select the Registration Year and Select “Next/Save.”

The screenshot shows the 'Registration Information' form. On the left is a sidebar with 'Registration Sections' including Instructions, Registration Information, Candidate Information, Political Information, Candidate Address, Candidate Phone / Email, Committee Information, Committee Address, Committee Phone/Email, Committee Social Media, Depository Information, Committee Officers' Information, and Submission. The main form area has a title 'Registration Information' and a dropdown menu for 'Registration Year *'. A red arrow points to this dropdown. At the bottom of the form are two buttons: 'Previous' and 'Next'. A red arrow points to the 'Next' button. The top of the page shows navigation links for 'Select Filer', 'Registration', and 'Fines', and a welcome message: 'Welcome back, candidatecommittee@guardian2.simplelogin.com'.

Candidate Information

Figure 22 Candidate Committee - Candidate Information

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

The screenshot shows the 'Candidate Information' form. On the left is the same sidebar as in Figure 21, with 'Candidate Information' highlighted. The main form area has a title 'Candidate Information' and four input fields: 'First Name *', 'Middle Name', 'Last Name *', and 'Suffix'. A red arrow points to the 'First Name' field. Below the 'Last Name' field is a red asterisk and the text '* - Required'. At the bottom of the form are two buttons: 'Previous' and 'Next'. A red arrow points to the 'Next' button. The top of the page shows navigation links for 'Select Filer', 'Registration', and 'Fines', and a welcome message: 'Welcome back, candidatecommittee@guardian2.simplelogin.com'.

Political Information

Figure 23 Candidate Committee - Political Information

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

The screenshot shows the "Political Information" form within the Guardian 2.0 system. The form is titled "Political Information" and contains three required fields: "Party Affiliation*", "Office Code*", and "Election*". A red asterisk indicates that these fields are required. Below the fields, there is a red asterisk and the text "* - Required". At the bottom of the form, there are two buttons: "Previous" and "Next". A red arrow points to the "Next" button, indicating that it should be selected after completing the form. The "Next" button is highlighted in blue.

Candidate Address

Figure 24 Candidate Committee - Candidate Address

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

The screenshot shows the "Candidate Address" form within the Guardian 2.0 system. The form is titled "Candidate Address" and contains a section for "Physical Address". This section includes four required fields: "Address Line 1*", "Address Line 2", "City*", and "State*". The "State" field is a dropdown menu currently showing "Oklahoma". There is also a "Postal Code*" field. A red asterisk indicates that these fields are required. Below the fields, there is a red asterisk and the text "* - Required". At the bottom of the form, there is a checkbox labeled "Mailing address is different than physical address." and two buttons: "Previous" and "Next". A red arrow points to the "Next" button, indicating that it should be selected after completing the form. The "Next" button is highlighted in blue.

Candidate Phone / Email

Figure 25 Candidate Committee - Candidate Phone and Email Entry

Complete Candidate Phone and Email entry and for each entry, select "Save and Add To List." Select the "Next" button to continue to the next screen.

Candidate Phone / Email
At least one Phone Number and one Email is Required

Phone Number * Extension

+ Save and Add to List

Email *

+ Save and Add to List

* - Required

Previous Next

Committee Information

Figure 26 Candidate Committee - Committee Information/Name

Enter Committee Full Name and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

Committee Information

Committee Full Name*

* Required

Previous Next

Committee Address

Figure 27 Candidate Committee - Committee Address

Enter Committee Address and select "Next/Save." Note: After entry, the "Next" button becomes "Next/Save."

The screenshot shows the "Committee Address" form in the Guardian 2.0 system. The form is titled "Committee Address" and contains a "Physical Address" section. The fields include "Address Line 1*", "Address Line 2", "City*", "State*" (a dropdown menu currently showing "Oklahoma"), and "Postal Code*". A checkbox labeled "Mailing address is different than physical address." is also present. A red asterisk indicates required fields. The "Next" button is highlighted with a red arrow, and the "Previous" button is also visible. The left sidebar shows the "Registration Sections" menu with "Committee Address" selected. The top navigation bar includes "Select Filer", "Registration", and "Fines". The user is logged in as "candidatecommittee@guardian2.simplelogin.com".

Committee Phone / Email

Figure 28 Candidate Committee - Committee Phone and Email Entry

Enter Committee phone and/or email and for each entry, select "Save and Add To List." Select the "Next" button to continue to the next screen.

The screenshot shows the "Committee Phone/Email" form in the Guardian 2.0 system. The form is titled "Committee Phone/Email" and includes a note: "At least one Phone Number and one Email is Required." The form has two main sections: "Phone Number" and "Email". Each section has a text input field and a "Save and Add to List" button. Red arrows point to the input fields and the "Save and Add to List" buttons. The "Next" button is highlighted with a red arrow at the bottom right. The left sidebar shows the "Registration Sections" menu with "Committee Phone/Email" selected. The top navigation bar includes "Select Filer", "Registration", and "Fines". The user is logged in as "candidatecommittee@guardian2.simplelogin.com".

Committee Social Media Information

Figure 29 Candidate Committee - Committee Social Media Information

Enter Committee social media details and for each entry, select "Save and Add To List." Select the "Next" button to continue to the next screen.

The screenshot shows the "Committee Social Media" form. On the left is a sidebar with "Registration Sections" including Instructions, Registration Information, Candidate Information, Political Information, Candidate Address, Candidate Phone / Email, Committee Information, Committee Address, Committee Phone/Email, Committee Social Media (highlighted), Depository Information, Committee Officers' Information, and Submission. The main form area has a title "Committee Social Media" and a subtitle "Social Media Type" with a dropdown menu. Below this is a "URL" input field. A red arrow points to the "URL" field. Below the URL field is a button labeled "+ Save and Add to List" with a red asterisk and the text "* - Required" next to it. A red arrow points to this button. At the bottom of the form are two buttons: "Previous" and "Next". A red arrow points to the "Next" button. The top of the screen shows a navigation bar with "Select Filer", "Registration", and "Fines" tabs, and a welcome message: "Welcome back, candidatecommittee@guardian2.simplelogin.com".

Depository Information

Figure 30 Candidate Committee - Depository Information

Enter information regarding the entity's financial institution and for each entry, select "Save and Add To List." Select the "Next" button to continue to the next screen.. At least one must be entered.

The screenshot shows the "Depository Information" form. On the left is a sidebar with "Registration Sections" including Instructions, Registration Information, Candidate Information, Political Information, Candidate Address, Candidate Phone / Email, Committee Information, Committee Address, Committee Phone/Email, Committee Social Media, Depository Information (highlighted), Committee Officers' Information, and Submission. The main form area has a title "Depository Information" and a subtitle "A depository is a financial institution that regularly conducts business in the state where the committee will maintain an account." Below this is a note: "At least one Depository is Required." The form contains several input fields: "Depository Name: *" (with a red asterisk), "Address Line 1*", "Address Line 2", "City*", "State*" (with a dropdown menu showing "Oklahoma"), and "Postal Code*" (with a red asterisk). A red arrow points to the "Depository Name" field. Below the input fields is a button labeled "+ Save and Add to List" with a red asterisk and the text "* - Required" next to it. A red arrow points to this button. At the bottom of the form are two buttons: "Previous" and "Next". A red arrow points to the "Next" button. The top of the screen shows a navigation bar with "Select Filer", "Registration", and "Fines" tabs, and a welcome message: "Welcome back, candidatecommittee@guardian2.simplelogin.com".

Committee Officers' Information

Figure 31 Candidate Committee - Committee Officers' Information & Figure 32 Candidate Committee - Committee Officers' Type Selection

Users are required to add at least one Chairperson and one Treasurer. Select the list to begin entering the officers' information. If the user is the only officer, select the check box for "Candidate is only Officer" to default the candidate as both the Chairperson and Treasurer.

Begin by selecting the first type of officer to be entered. At the end of entry, you will be given an option to add additional officers.

The figure consists of two screenshots of the 'Committee Officers' Information' form. The left screenshot shows the form with red arrows pointing to the 'Candidate is only officer' checkbox, the 'Role' dropdown menu, the '+ Save and Add to List' button, and the 'Next' button. The right screenshot shows the form with a red arrow pointing to the 'Role' dropdown menu.

Committee Officers' Information

Registering a Candidate Committee requires one Chairperson and one Treasurer. The candidate can serve as Chairperson and Treasurer. A Candidate Committee may also list one Deputy Treasurer and list as many individuals as desired as Designated Filing Agents. A Designated Filing Agent is someone authorized by the committee to enter data and file reports on their behalf.

☐ Candidate is only officer

Role *

+ Save and Add to List

Previous Next

Committee Officers' Information

Registering a Candidate Committee requires one Chairperson and one Treasurer. The candidate can serve as Chairperson and Treasurer. A Candidate Committee may also list one Deputy Treasurer and list as many individuals as desired as Designated Filing Agents. A Designated Filing Agent is someone authorized by the committee to enter data and file reports on their behalf.

☐ Candidate is only officer

Role *

Chairperson

Treasurer

Deputy Treasurer

Designated Filing Agent

Previous Next

Figure 33 Candidate Committee Officer Information

Enter the officer's information including name, address, and contact information and for each entry, select "Save and Add To List.". Before selecting next, determine if additional officers should be entered.

Individuals as desired as Designated Filing Agents. A Designated Filing Agent is someone authorized by the committee to enter data and file reports on their behalf.

☐ Candidate is only officer

Role *
Chairperson X Self

First Name *

Middle Name

Last Name *

Suffix

Address Line 1 *

Address Line 2

City *

State *
Oklahoma

Postal Code *

Phone Number *

Extension

Email *

+ Save and Add to List Save and Add to List

Previous Next

Figure 34 Candidate Committee Officer Entry and Additional Entry Option

Once the entry of all required data has been entered, select "Save and Add To List." This action provides the ability to add additional officers. When officer entry is complete, select "Next" to continue.

Committee Officers' Information

Registering a Candidate Committee requires one Chairperson and one Treasurer. The candidate can serve as Chairperson and Treasurer. A Candidate Committee may also list one Deputy Treasurer and list as many individuals as desired as Designated Filing Agents. A Designated Filing Agent is someone authorized by the committee to enter data and file reports on their behalf.

☐ Candidate is only officer

Role *

+ Save and Add to List Save and Add to List

Previous Next

Submission

Figure 35 Sign and Submit the Registration

In order 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 registration for approval. The registration must be accepted (Conditional or Final) prior to entering transactions or filing reports.

The screenshot shows the 'Submission' form in the Guardian 2.0 system. The form is titled 'Submission' and contains a checkbox for acknowledgment, a text input field for 'Filer Name', and two buttons: 'Previous' and 'Submit'. Red arrows point to the checkbox, the 'Filer Name' field, and the 'Submit' button. The left sidebar shows the 'Registration Sections' menu with 'Submission' selected. The top navigation bar includes 'Select Filer', 'Registration', and 'Fines'.

Submission

☒ 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 Statement of Organization.

Filer Name *

Previous Submit

Registrations Awaiting Approval

Figure 36 Pending Registrations

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

The screenshot shows the 'Select a Filer' screen in the Guardian 2.0 system. The screen displays a table with one row of data for a candidate. The table has columns for Filer ID, Filer Name, Filer Type, Status, and Action. The status is 'Pending Approval'. A 'Select' button is visible in the Action column. The top navigation bar includes 'Select Filer' and 'Registration'. The bottom of the screen shows pagination controls.

Select a Filer

Select the filer you want to manage. You can switch filers at any time.

Filer ID	Filer Name	Filer Type	Status	Action
100000047		CANDIDATE	Pending Approval	Select

<< < 1 > >>

VI. Filing Contributions or Expenditures

Figure 37 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.

The screenshot shows the 'Select a Filer' interface. At the top, there's a header 'Select a Filer' and a sub-header 'Select the filer you want to manage. You can switch filers at any time.' Below this is a 'Start New Registration' button and a search bar labeled 'Search filers...'. A table lists filers with columns: Filer ID, Registration Year, Filer Name, Filer Type, Status, and Action. The table contains four rows of data. Red arrows point to the 'Continue' and 'Delete' buttons in the first row, and the 'Select' button in the second row.

Filer ID	Registration Year	Filer Name	Filer Type	Status	Action
100000259	2025	Name Unavailable	CANDIDATE	Registration In-Progress	Continue Delete
100000002	In-Progress		CANDIDATE	Registered	Select
100000048	In-Progress	Name Unavailable	CANDIDATE	Inactive	
100000257	2025		CANDIDATE	Inactive	

Figure 38 Filing Reports Option

Candidate Committee User can select this option to view, file, or amend reports for the selected registration.

The screenshot shows the 'Welcome to the Oklahoma Ethics Filing System' dashboard. At the top, there's a navigation bar with links: Home, Filing Schedule, Fines, Registration, and Switch Filer. Below the navigation bar, there's a section titled 'Welcome to the Oklahoma Ethics Filing System' with a sub-header 'Working as CANDIDATE:'. A reminder message states 'Reminder: SOME TEST REPORT was due on 6/30/2025'. Four main action buttons are displayed: Entity Selection, View, File or Amend Reports / Registration(s), Pay Fees / Fines, and Entity Profile. A red arrow points to the 'View, File or Amend Reports / Registration(s)' button.

Figure 39 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.

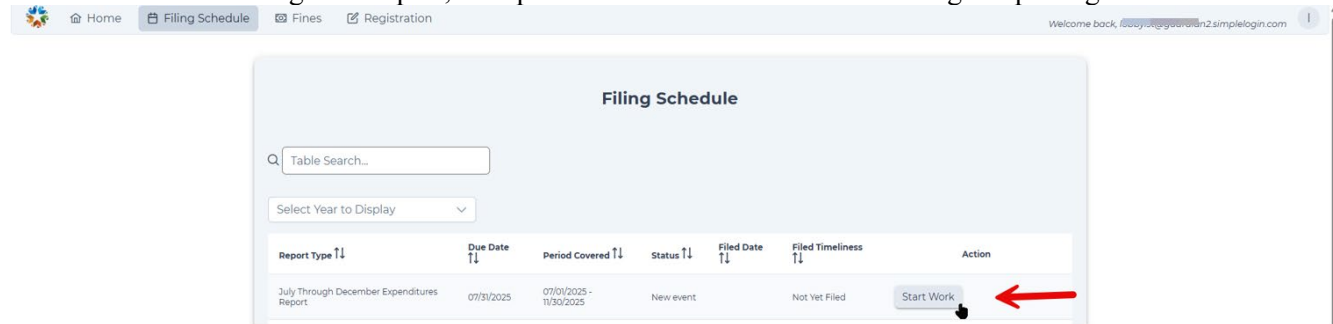
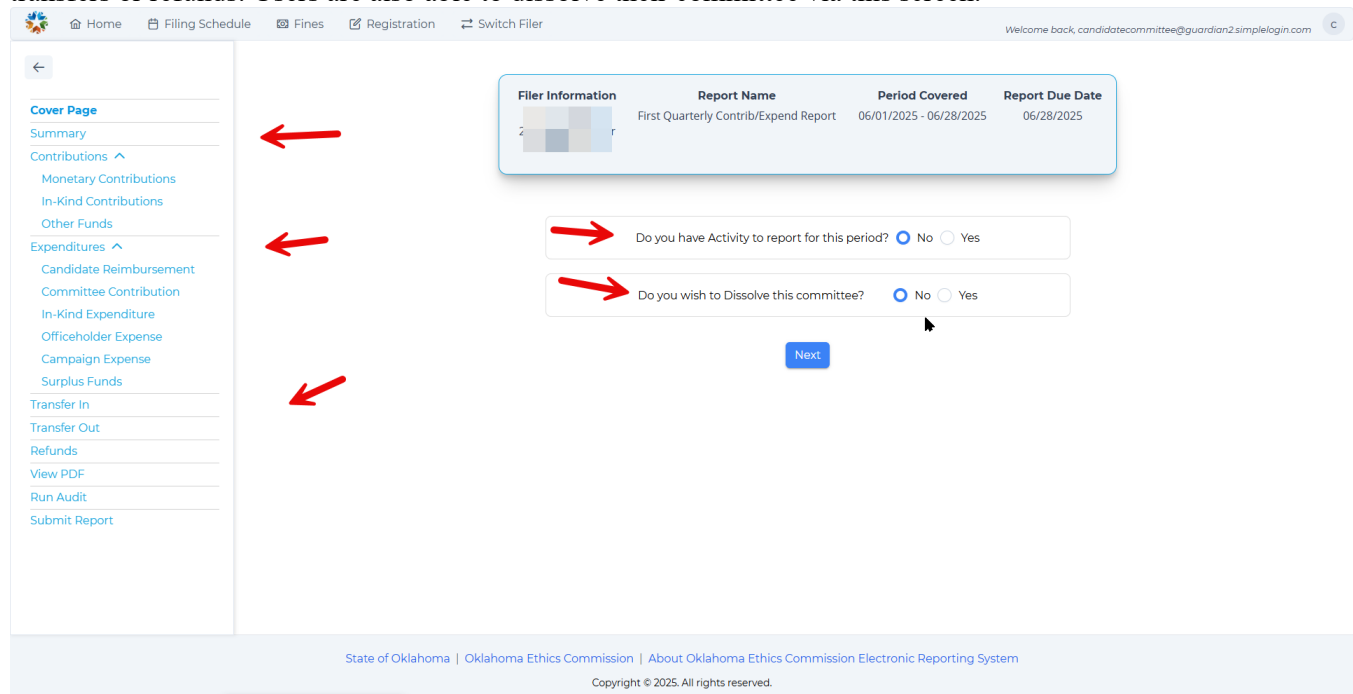


Figure 40 Begin Work Filing Contributions or Expenditures

Users should select the type of activity they wish to report from the distinct types of contributions, expenditures, transfers or refunds. Users are also able to dissolve their committee via this screen.



Figures 41, 47 & 48 Complete the Contribution Activity

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

The screenshot shows the Guardian 2.0 system interface. The left sidebar contains a list of navigation items: Cover Page, Summary, Contributions (expanded), Monetary Contributions (circled in red), In-Kind Contributions, Other Funds, Experience, Candidate Reimbursement, Committee Contribution, In-Kind Expenditure, Officeholder Expense, Campaign Expense, Surplus Funds, Transfer In, Transfer Out, Refunds, View PDF, Run Audit, and Submit Report. The main content area displays the 'Monetary Contribution' form. The form has a red asterisk indicating required fields. The fields are: Contribution Date (08/04/2025), Contribution Amount (\$0.00), ED Number (EDI Users Only), and Contributor Type (dropdown). Below the form are 'Cancel' and 'Save' buttons. Red arrows point to the 'Contribution Date', 'Contribution Amount', 'ED Number (EDI Users Only)', 'Contributor Type', and 'Save' button.

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In-Kind Contribution

* Required

Contribution Date *

Contribution Amount *

☐ Itemize this contribution

ED Number (EDI Users Only)

Contributor Type *

Contributor Type is required.

Cancel Save

Other Funds

* Required

Contribution Date *

Contribution Amount *

☐ Itemize this contribution

ED Number (EDI Users Only)

Description of Other Funds Accepted

Type of Other Funds *

Contributor Type *

Cancel Save

Figure 42 Complete Transfer In Activity

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

The screenshot displays the 'Transfer In' form within the Oklahoma Ethics Commission's electronic reporting system. The form is titled 'Transfer In' and includes a red asterisk indicating required fields. The fields are:

- Transfer Type ***: A dropdown menu.
- Transfer Date ***: A date input field with a calendar icon.
- Transfer Amount ***: A text input field.
- EDI Number (EDI Users Only)**: A text input field.
- Transfer Description**: A large text area for detailed notes.

Below the form are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button. The sidebar on the left contains a navigation menu with the following items:

- Cover Page
- Summary
- Contributions ^
- Monetary Contributions
- In-Kind Contributions
- Other Funds
- Transfer In** (circled in red)
- Expenditures ^
- Candidate Reimbursement
- Committee Contribution
- In-Kind Expenditure
- Officeholder Expense
- Campaign Expense
- Surplus Funds
- Transfer Out
- Loans
- View PDF
- Run Audit
- Submit Report

The footer of the page contains the following text:

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About Oklahoma Ethics Commission Electronic Reporting System
Copyright © 2025. All rights reserved. | 6e0a6889 - 2025-10-01 04:39 AM

Figure 50 Expenditure Activity

Fill in each of the fields based upon the type of contribution selected and “Save” the record.
Candidate Reimbursement:

The screenshot displays the 'Candidate Reimbursement' form within the Guardian 2.0 system. On the left, a sidebar contains navigation links: Cover Page, Summary, Contributions (with a dropdown arrow), Monetary Contributions, In-Kind Contributions, Other Funds, Transfer In, Expenditures (with a dropdown arrow), **Candidate Reimbursement** (circled in red), Committee Contribution, In-Kind Expenditure, Officeholder Expense, Campaign Expense, Surplus Funds, Transfer Out, Loans, View PDF, Run Audit, and Submit Report. The main form area is titled 'Candidate Reimbursement' and includes a red asterisk indicating required fields. The form contains the following fields: 'Expenditure Date *' (with a calendar icon), 'Expenditure Amount*' (with a red arrow pointing to it), a checkbox for 'Itemize this expense', 'EDI Number (EDI Users Only)', and 'Expenditure Description*' (with a red arrow pointing to it). At the bottom of the form are two buttons: 'Cancel' and 'Save' (with a dropdown arrow), with a red arrow pointing to the 'Save' button.

Figures 51, 52, 53, 54, & 55 of Expenditure Activity

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

The image displays five screenshots of expenditure activity forms, each with red arrows indicating required fields:

- Contribution to Committee**
 - * Required
 - Expenditure Date *
 - Expenditure Amount *
 - ☐ Itemize this expense
 - Description of Goods or Services *
 - EDI Number (EDI Users Only)
 - Recipient Information
 - Committee Type *
 - Buttons: Cancel, Save
- In-Kind Expenditure**
 - * Required
 - Expenditure Date *
 - Expenditure Amount *
 - ☒ Itemize this expense
 - Description of Goods or Services *
 - EDI Number (EDI Users Only)
 - Recipient Information
 - Recipient Type *
 - Buttons: Cancel, Save
- Officeholder Expense**
 - * Required
 - Expenditure Date *
 - Expenditure Amount *
 - ☐ Itemize this expense
 - Description of Goods or Services *
 - EDI Number (EDI Users Only)
 - Recipient Information
 - Recipient Type *
 - Buttons: Cancel, Save
- Ordinary and Necessary Campaign Expense**
 - * Required
 - Expenditure Date *
 - Expenditure Amount *
 - ☐ Itemize this expense
 - Description of Goods or Services *
 - EDI Number (EDI Users Only)
 - Recipient Information
 - Recipient Type *
 - Buttons: Cancel, Save
- Surplus Funds**
 - * Required
 - Transfer From Committee
 - Select a committee
 - Committee Number
 - Address
 - Country* (United States)
 - Address Line 1*
 - Address Line 2
 - City*
 - State* (Oklahoma)
 - Postal Code*
 - Expenditure Date *
 - Expenditure Amount *
 - ☐ Itemize this expense
 - Description of Goods or Services *
 - EDI Number (EDI Users Only)
 - Buttons: Cancel, Save

Figures 56 Transfer Out

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

[←](#)

[Cover Page](#)

[Summary](#)

[Contributions ^](#)

[Monetary Contributions](#)

[In-Kind Contributions](#)

[Other Funds](#)

[Transfer In](#)

[Expenditures ^](#)

[Candidate Reimbursement](#)

[Committee Contribution](#)

[In-Kind Expenditure](#)

[Officeholder Expense](#)

[Campaign Expense](#)

[Surplus Funds](#)

[Transfer Out](#)

[Loans](#)

[View PDF](#)


[Run Audit](#)

[Submit Report](#)

Transfer Out

* Required

Transfer Type *


Transfer Date * 

Transfer Amount*

EDI Number (EDI Users Only)

Transfer Description *

Cancel

Save 

Figures 57 & 58 Loans

Click Loans and then “Add New Loan”. Fill in all applicable information and Save.

Loan Payments & Forgiveness

Loans will be displayed here after they are added.

Add New Loan

Loans

* Required

Loan Date *

Loan Description

Principal Amount *

Interest Rate (number between 0-100, ex 4.75)

Loan Terms *

EDI Number (EDI Users Only)

Loan Source Details

Source Type *

Cancel Save

Once a Loan is saved it will be logged in the system:

Loan Payments & Forgiveness

Loans

Q

Table Search...

Loan Source ↑↓	Loan Source Type ↑↓	Loan Description ↑↓	Loan Terms ↑↓	Date of Loan ↑↓	Original Amount ↑↓	Current Balance ↑↓	Action
Self	Self	DETAILS OF LOAN TER...	10/01/2025	\$1,000.00	\$1,000.00	<div><div>\$</div><div>✉</div><div>✎</div><div>🗑</div></div>	

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Add New Loan

To enter payments , forgiveness , edit , or delete  the loan click the corresponding button options on the far right of the loan.

Figures 59, 60, & 61 Loan Payment

Click the payments  button and then the “Add New Payment” button

Payments for Loan made on 10-01-2025.

No payments exist.

Add New Payment

In the pop-up, fill in the appropriate information for the Loan Payment and Save.

Add/Edit Loan Payment

Loan made on 10-01-2025.

* Required

Payment Date *

Principal Amount Paid *

EDI Number (EDI Users Only)

Cancel

Save

Once a payment is entered it will be available to edit or delete:

Payments for Loan made on 10-01-2025.

Q Table Search...

Date of Payment ↑↓	Date Payment Entered ↑↓	Principal Payment ↑↓	Action
10/01/2025	10/01/2025	\$750.00	<div>Edit PaymentDelete Payment</div>
« < 1 > »			

Add New Payment

Figures 62, 63, & 64 Loan Forgiveness

Click the forgiveness  button and then the “Add New Payment” button In the pop-up, fill in the appropriate information for the Loan Payment and Save.

Forgiveness for Loan made on 10-01-2025.

No forgiveness exists.



[Add New Forgiveness](#)


In the pop-up, fill in the appropriate information for the Loan Forgiveness and Save.


Add/Edit Loan Forgiveness

×

Loan made on 10-01-2025.

** Required*



[Cancel](#) [Save](#) 

Once a Forgiveness is entered it will be available to edit or delete:

Forgiveness for Loan made on 10-01-2025.

Q

Date of Forgiveness ↑↓	Date Forgiveness Entered ↑↓	Forgiveness Amount ↑↓	Action
10/01/2025	10/01/2025	\$250.00	Edit Forgiveness Delete Forgiveness

<< < 1 > >>

[Add New Forgiveness](#)

Submitting Reports

Figure 65 Submit Report to Preview or Submit and E-sign

Users can select “Preview PDF” or “Submit & E-sign”.

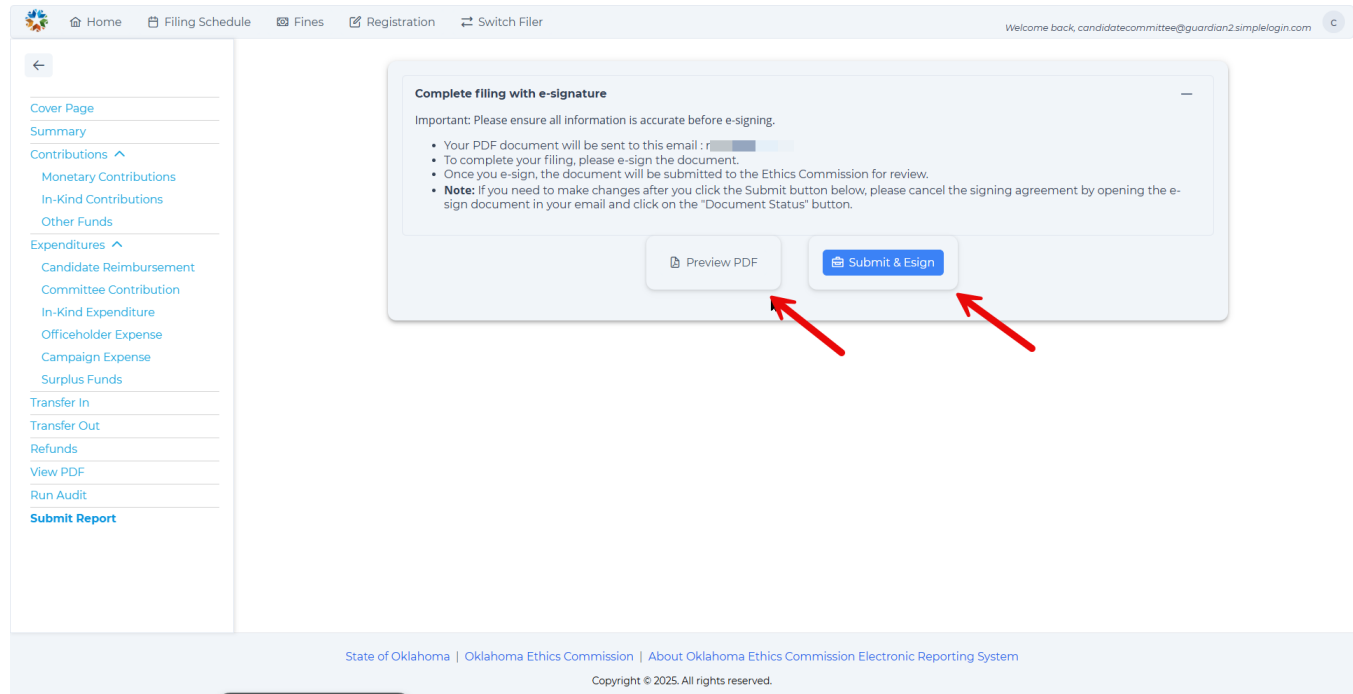


Figure 6643 Complete E-sign of PDF

User can select to “Complete E-sign” which opens the PDF document, which can then be reviewed prior to having the option of signing the PDF electronically or selecting an options to decline signature if it was not complete/accurate.

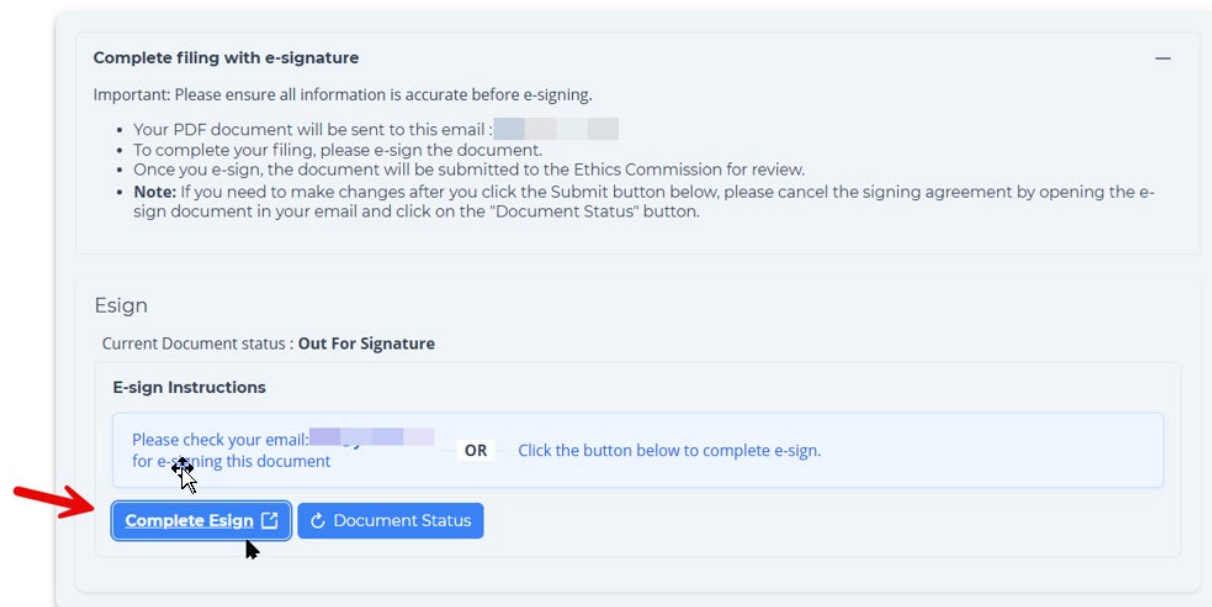



Figure 67 & 68 View and E-sign PDF

 **OKLAHOMA ETHICS**
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CANDIDATE COMMITTEE
CONTRIBUTIONS AND EXPENDITURES REPORT

AMENDED: NO

Full Legal Name of Candidate (Last, First, Middle): _____ Ethics Number: _____

Full Name of Committee: _____

Complete Name of Office Sought: _____ Special or General Election Date: 09/04/2025

Type of Report: null Third Quarterly Report of Contributions and Expenditures Reporting Period: 06/01/2025 – 07/31/2025


☒ **NO ACTIVITY.** This Committee did not receive any funds or contributions, incur and loans, or expend any funds during this reporting period.

☒ **FINAL REPORT.** This Committee dissolved in accordance with the Ethics Rules and has no funds remaining.

☒ **DEBT.** This Committee dissolved with outstanding debt which was resolved as indicated on Schedule J.

SCHEDULE SUMMARY		REPORTING PERIOD TOTAL	AGGREGATE TOTAL
1.	REPORTING PERIOD BEGINNING BALANCE:	\$0.00	
2.	Surplus Funds Transferred from Prior Committee [Schedule B]	\$0.00	\$0.00
3.	Monetary Contributions from Individuals [Schedule A]	\$0.00	\$0.00
4.	Monetary Contributions from PACs [Schedule A]	\$0.00	\$0.00
5.	Monetary Contributions from a Political Party [Schedule A]	\$0.00	\$0.00
6.	All Other Funds [Schedule B]	\$0.00	\$0.00
7a.	Loans [Schedule C]	\$0.00	\$0.00
7b.	Loan Forgiveness [Schedule C]	\$0.00	\$0.00
8.	TOTAL FUNDS RECEIVED:	\$0.00	\$0.00
9.	In Kind Contributions [Schedule D]	\$0.00	\$0.00
10.	Transfer of Assets from Prior Committee [Schedule B]	\$0.00	\$0.00
11.	TOTAL FUNDS AND IN KIND CONTRIBUTIONS RECEIVED:	\$0.00	\$0.00
12.	Campaign Expenditures Made [Schedule E]	\$0.00	\$0.00
13.	Contributions to Candidate Committees [Schedule E]	\$0.00	\$0.00
14.	Officeholder Expenses [Schedule F]	\$0.00	\$0.00
15.	Surplus Funds [Schedule H or Schedule B for transfers to new committee]	\$0.00	\$0.00
16.	TOTAL FUNDS EXPENDED:	\$0.00	\$0.00
17.	In-Kind Expenditures [Schedule F or Schedule H for In-Kind Surplus Funds]	\$0.00	\$0.00

Click to Sign PDF

 **Powered by Adobe Acrobat Sign**

[DEMO USE ONLY]

Options | Q | ? |

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: _____

Signed On: Jul 15, 2025

Signature: * Click to Sign

Filing Date: _____ Printing Date: 7/15/2025 3:57:28 PM Page: 1/1

1 required field remaining

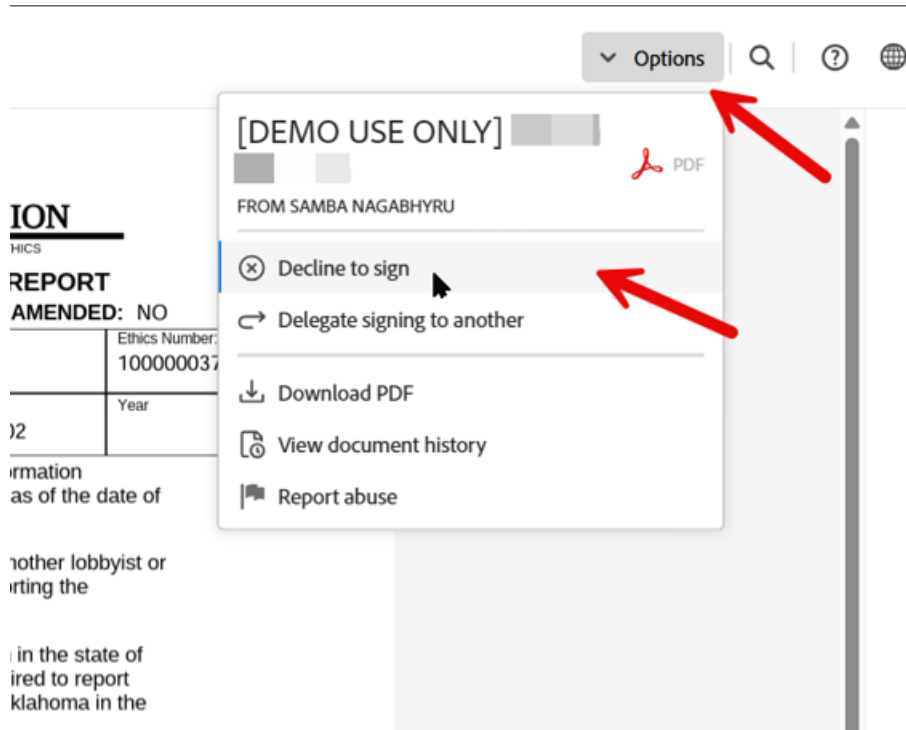
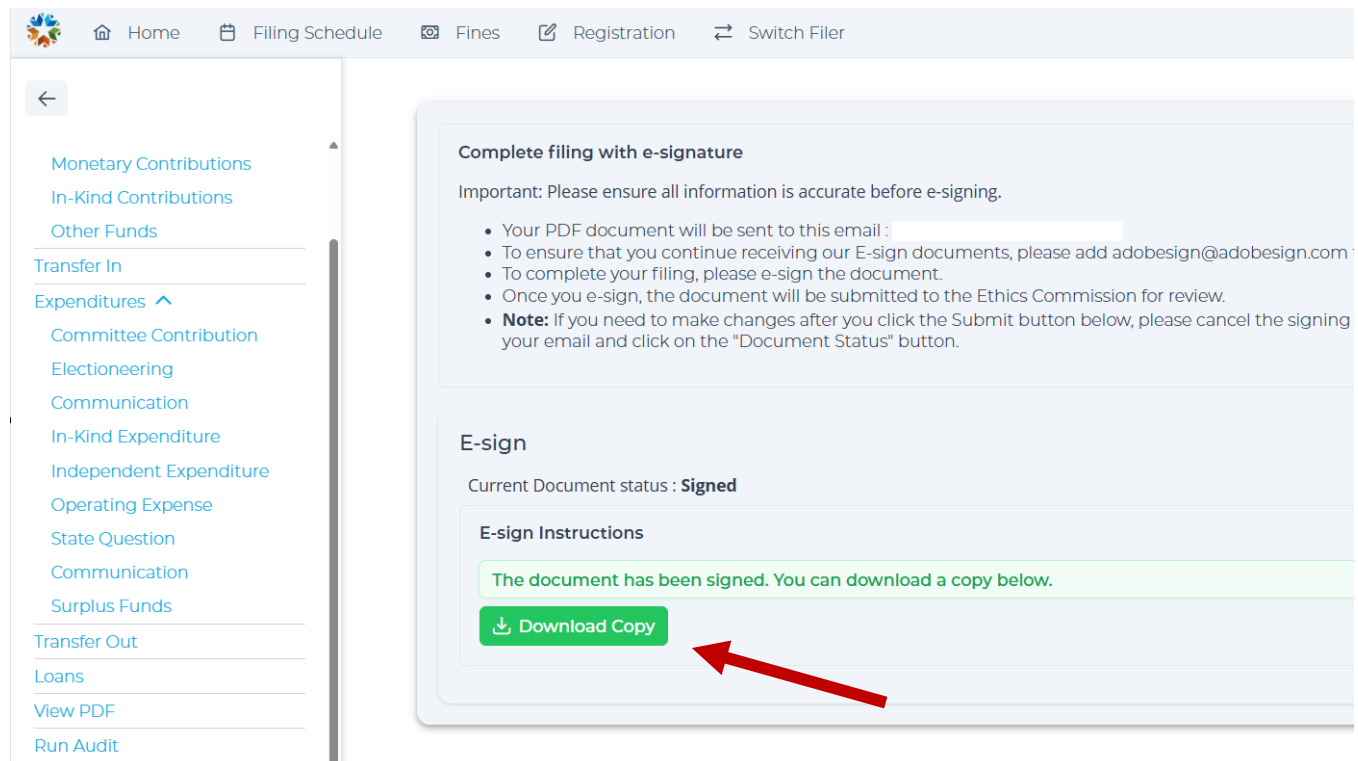
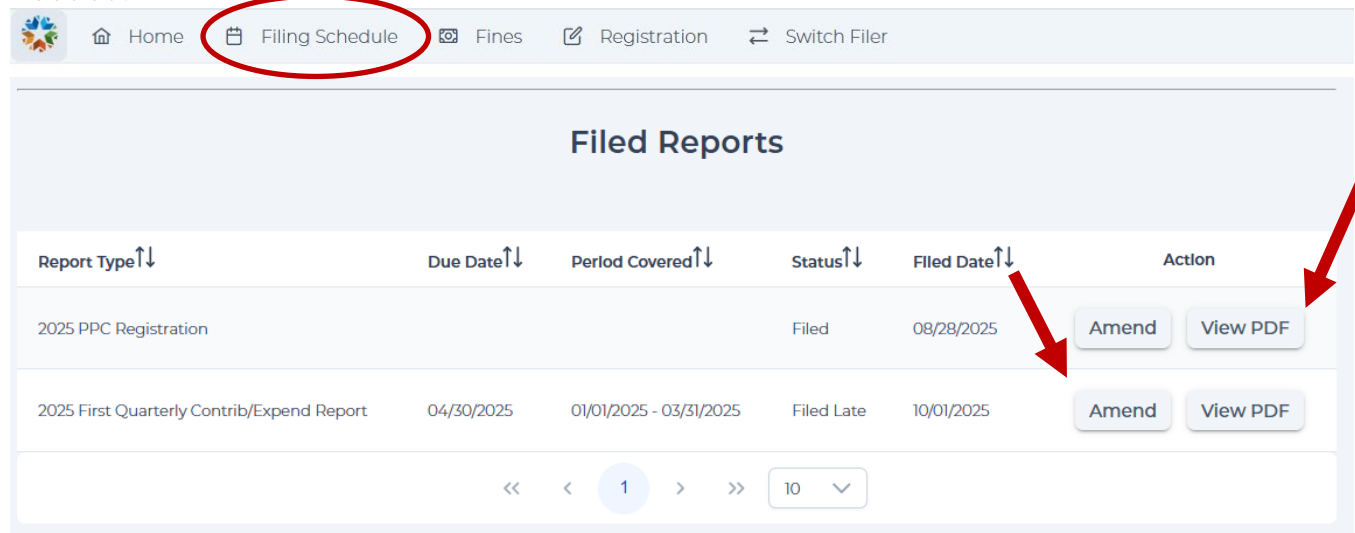
Figure 69 PDF Options to Decline and Other Options*Figure 70 Option to Download copy of Signed PDF*

Figure 441 View or Amend Filed Report Option

By Clicking the “Filing Schedule” you can view all assigned and filed reports. Once a report is submitted you can locate it under the Filed Reports section in order to View or Amend, as needed.



The screenshot displays the Guardian 2.0 system interface. At the top, a navigation bar includes icons for Home, Filing Schedule (circled in red), Fines, Registration, and Switch Filer. Below this, the 'Filed Reports' section is shown. It contains a table with columns: Report Type, Due Date, Period Covered, Status, Filed Date, and Action. Two reports are listed: '2025 PPC Registration' and '2025 First Quarterly Contrib/Expend Report'. Both reports have 'Amend' and 'View PDF' buttons in the Action column. Red arrows point to these buttons. At the bottom, there is a pagination control showing page 1 of 10.

Report Type↑↓	Due Date↑↓	Period Covered↑↓	Status↑↓	Filed Date↑↓	Action
2025 PPC Registration			Filed	08/28/2025	<button>Amend</button> <button>View PDF</button>
2025 First Quarterly Contrib/Expend Report	04/30/2025	01/01/2025 - 03/31/2025	Filed Late	10/01/2025	<button>Amend</button> <button>View PDF</button>

Navigation: << < 1 > >> 10 ▼