

Oklahoma Ethics Commission



Oklahoma Ethics Commission Guardian 2.0 System Onboarding Guide Lobbyist & Liaisons

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 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

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

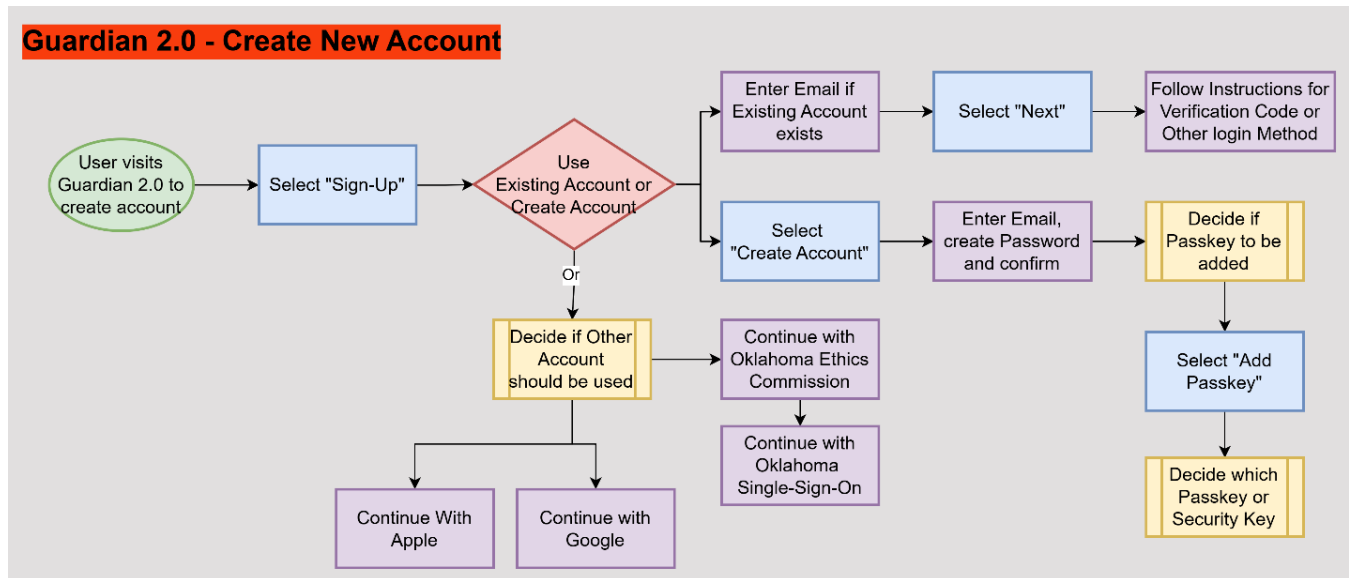


Figure 2 The Guardian 2.0 Landing Page

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.

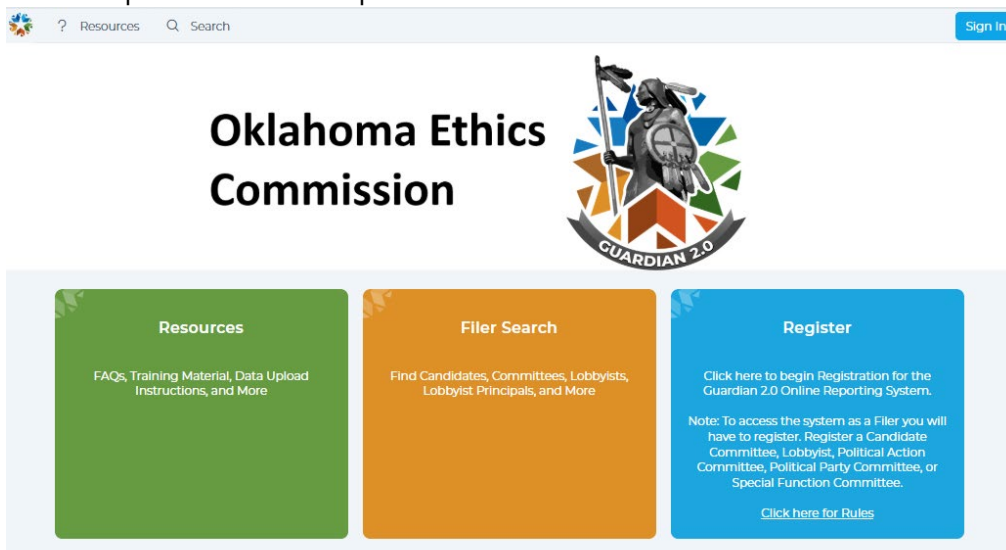
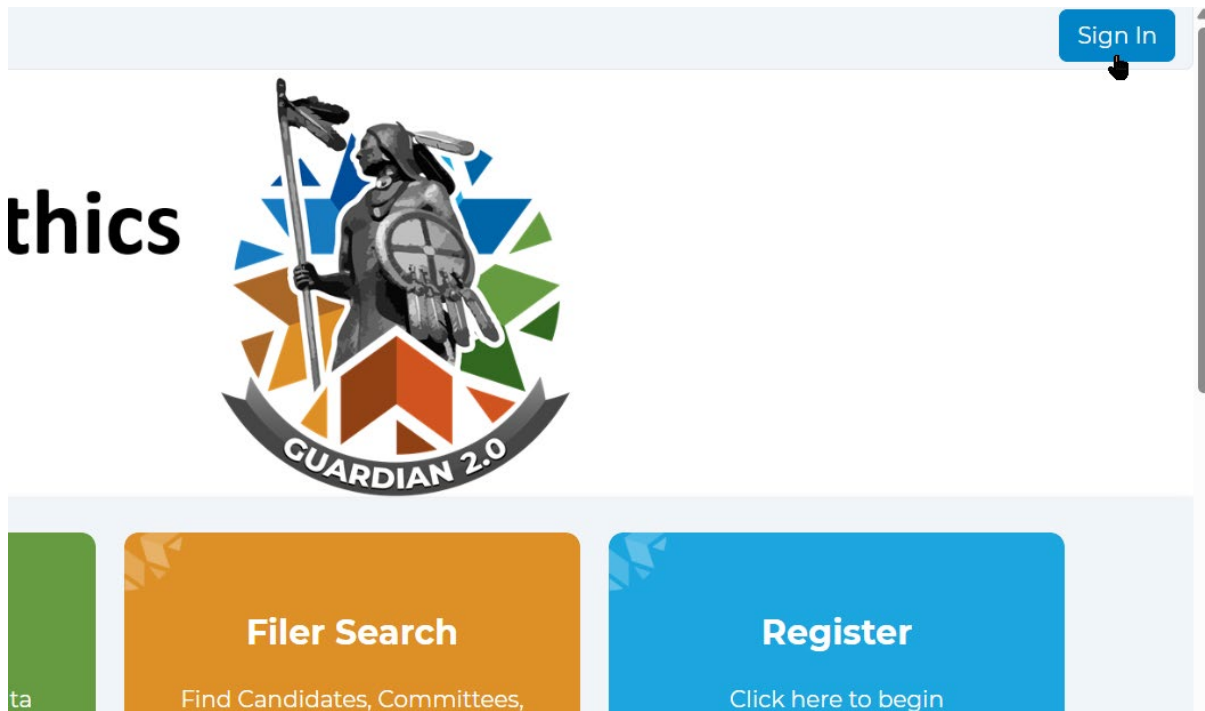


Figure 3 Select Sign In to Create Account*Figure 4 Enter Email to Create Account*

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.

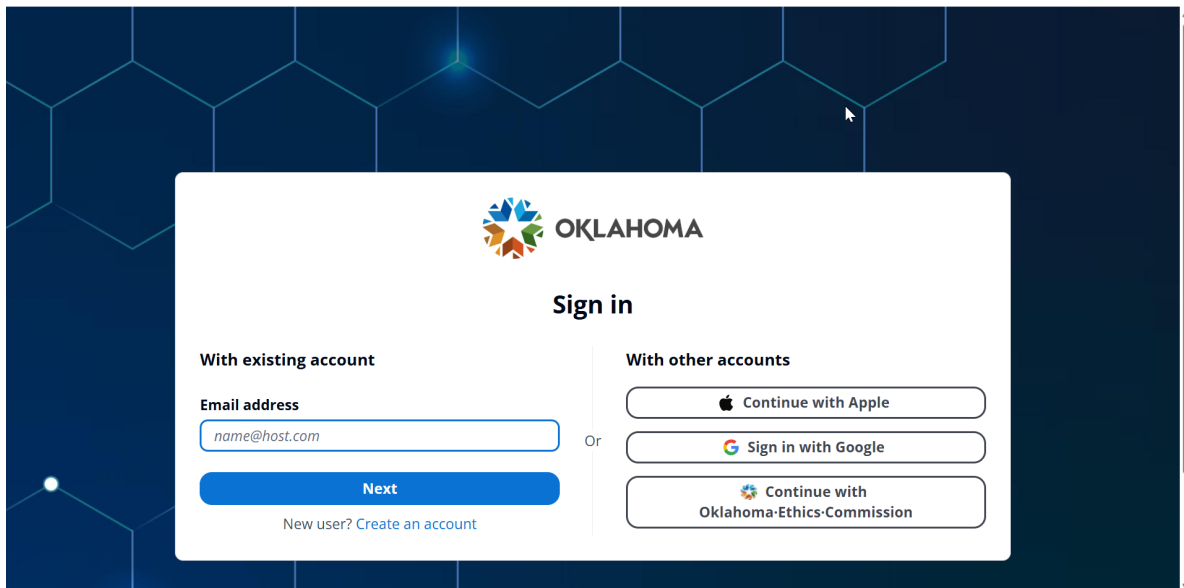
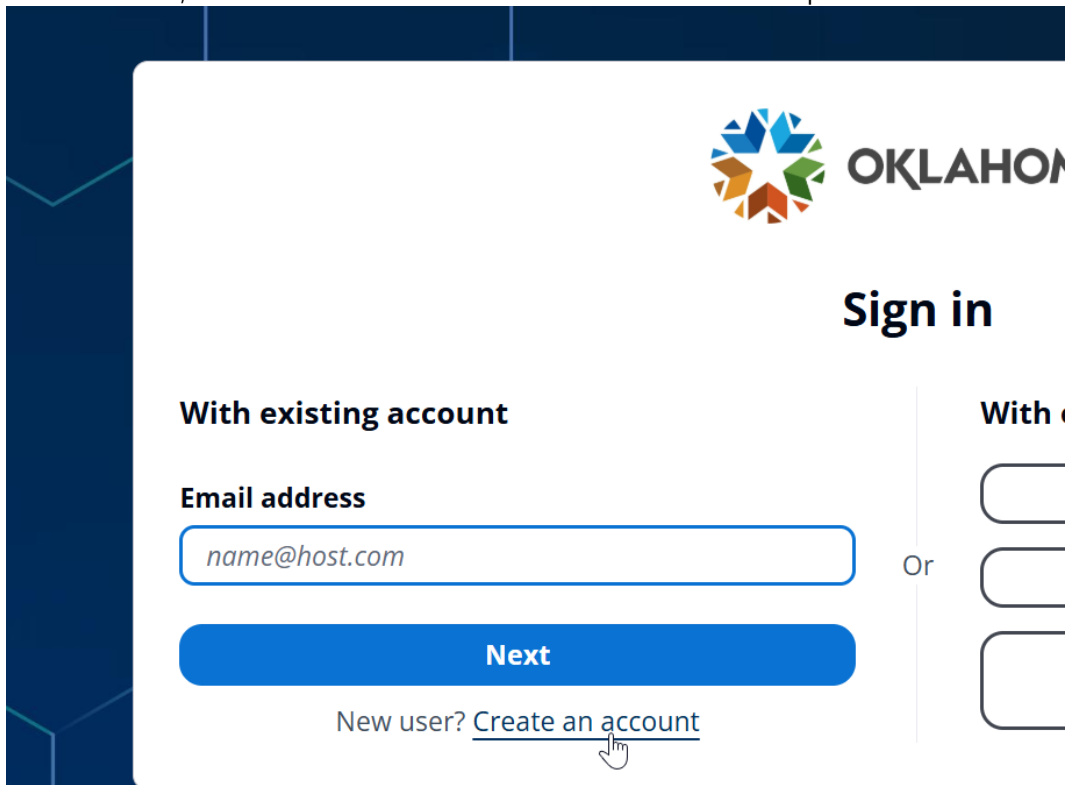


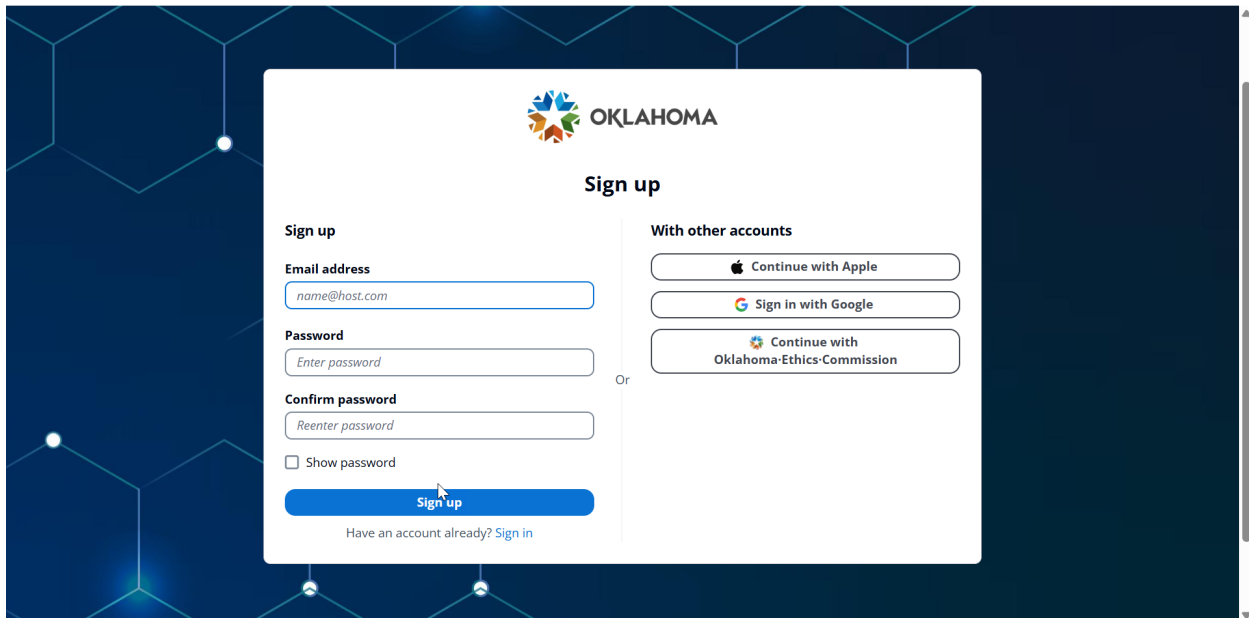
Figure 5 Select Create Account

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



The screenshot shows the Oklahoma 'Sign in' page. At the top right is the Oklahoma logo. Below it, the text 'Sign in' is displayed. The page is divided into two main sections: 'With existing account' on the left and 'With other accounts' on the right. 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. Underneath the button is the text 'New user? [Create an account](#)', with a mouse cursor pointing at the link. The 'With other accounts' section on the right shows three placeholder icons for social login.

Figure 6 Create Password and Confirm



The screenshot shows the Oklahoma 'Sign up' page. At the top center is the Oklahoma logo. Below it, the text 'Sign up' is displayed. The page is divided into two main sections: 'Sign up' on the left and 'With other accounts' on the right. In the 'Sign up' section, there is a label 'Email address' above a text input field containing 'name@host.com'. Below that is a 'Password' label above a text input field containing 'Enter password'. Below the password field is a 'Confirm password' label above a text input field containing 'Reenter password'. Below the confirm password field is a checkbox labeled 'Show password'. At the bottom of the 'Sign up' section is a blue 'Sign up' button. Below the button is the text 'Have an account already? [Sign in](#)'. The 'With other accounts' section on the right shows three buttons: 'Continue with Apple', 'Sign in with Google', and '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. At the top, the OKLA logo is visible. The main heading is "Sign up". Below it, there are two columns. The left column contains a "Sign up" section with an "Email address" field and a "Password" field. 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". The right column contains a "Sign up" section with an "Email address" field, a "Password" field, and a "Confirm password" field. Below the confirm password field, there is a checkbox labeled "Show password". At the bottom of the right column, there is a large blue "Sign up" button and a link that says "Have an account already? Sign in".

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 displays the OKLA Sign up interface after password confirmation. The OKLA logo is at the top. Below it, there is a green checkmark indicating "Your registration has been confirmed!". The main heading is "Set up sign-in with a passkey". Below this, there is a blue button labeled "Add passkey" and a link labeled "Not now". The background is dark blue with a white circle and a blue line.

Figure 7 Passkey Creation via Google Password Manager

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

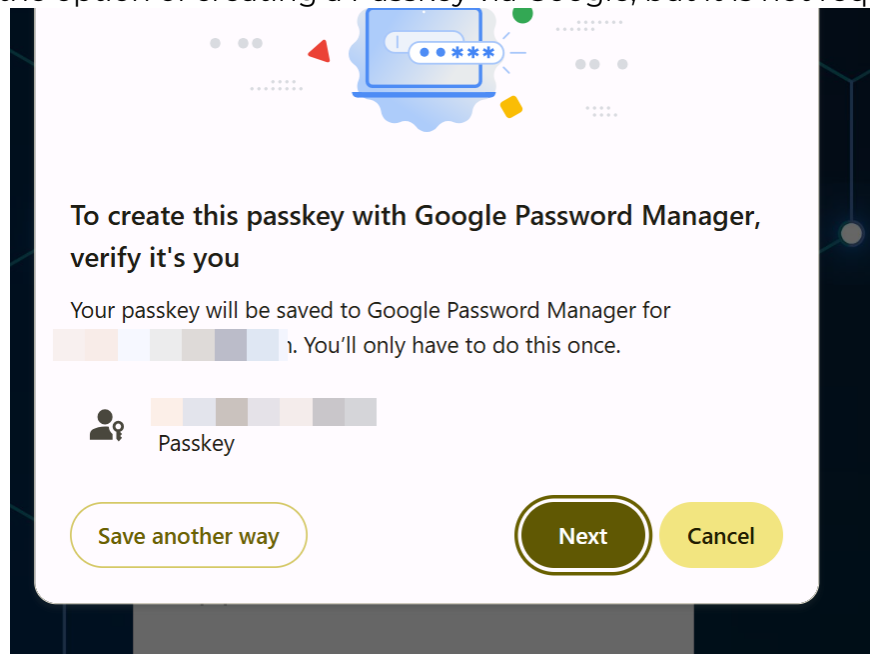
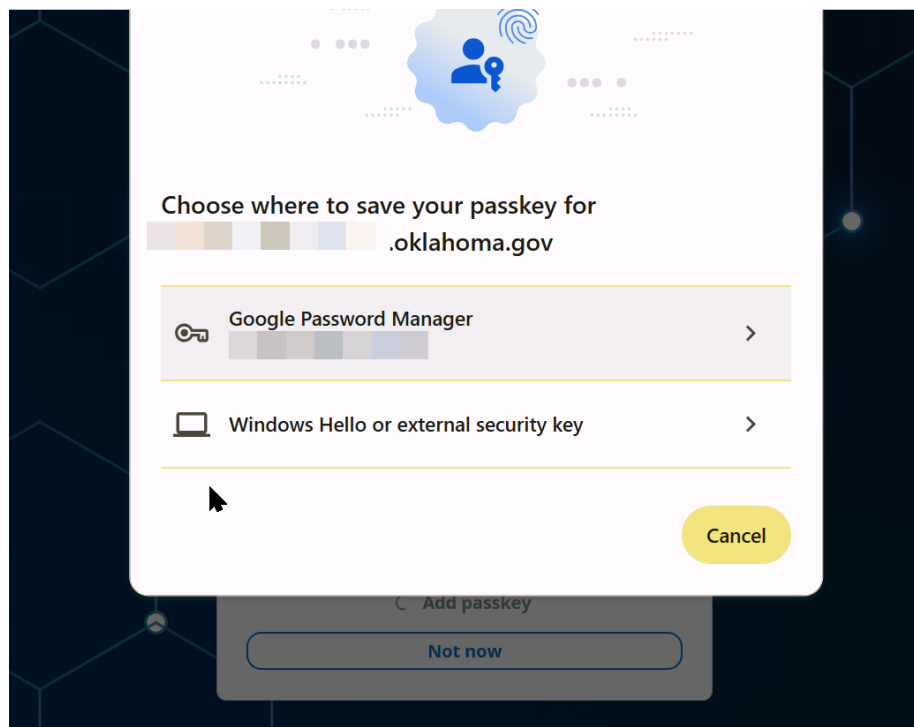


Figure 8 Passkey Setup



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

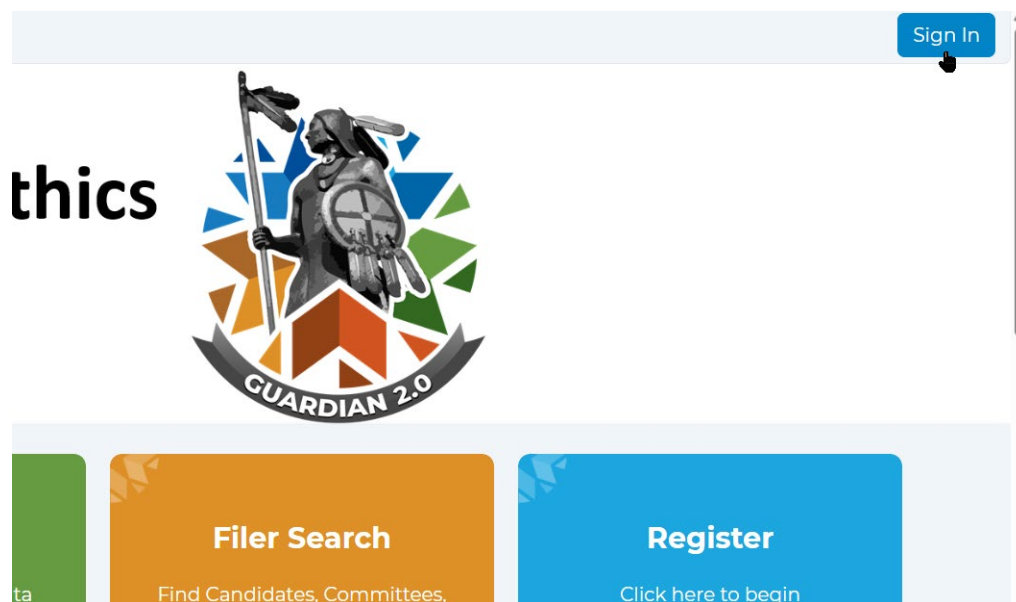


Figure 11 Existing Account Login Enter Email or select “Create an Account”

OKLAHOMA

Sign in

With existing account

Email address

name@host.com

Next

New user? [Create an account](#)

With other accounts

Or

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

1234 Enter the code that we sent to the email address r***@y***. The code expires in 15 minutes.

Verification code

Enter code

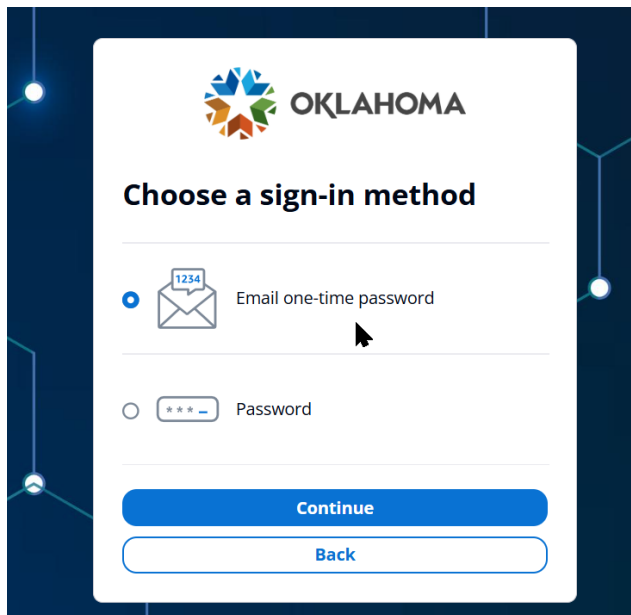
Continue

Back

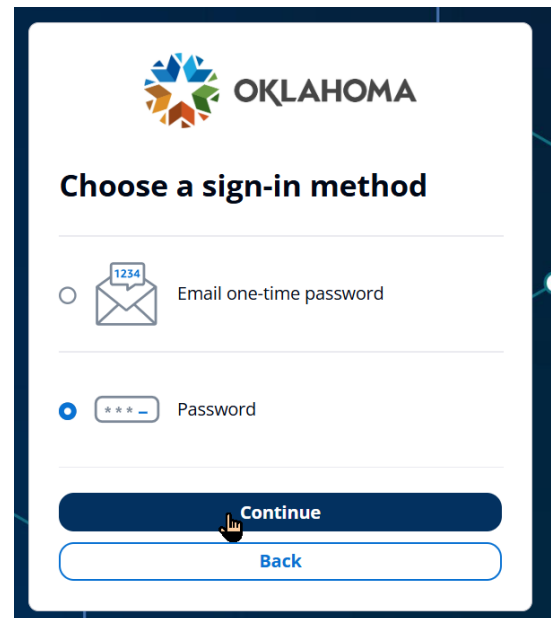
OR

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).

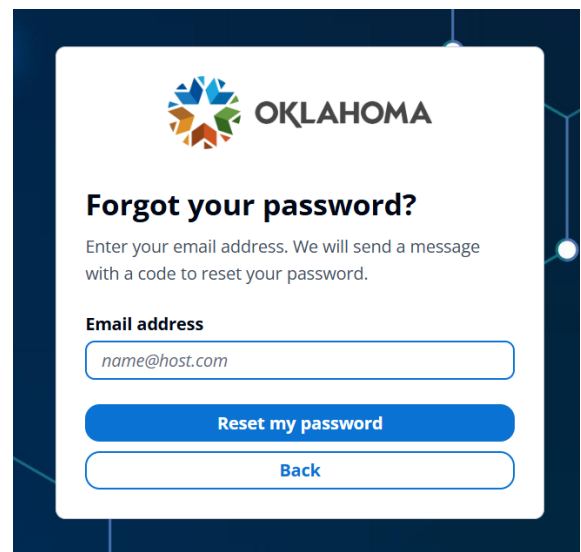


The screenshot shows the 'Choose a sign-in method' screen for the OKLAHOMA system. At the top is the OKLAHOMA logo. Below it, the title 'Choose a sign-in method' is displayed. There are two options: 'Email one-time password' (unselected with a grey radio button and an envelope icon with '1234') and 'Password' (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 paragraph: 'Enter your email address. We will send a message with a code to reset your password.' Below this is an 'Email address' label above 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

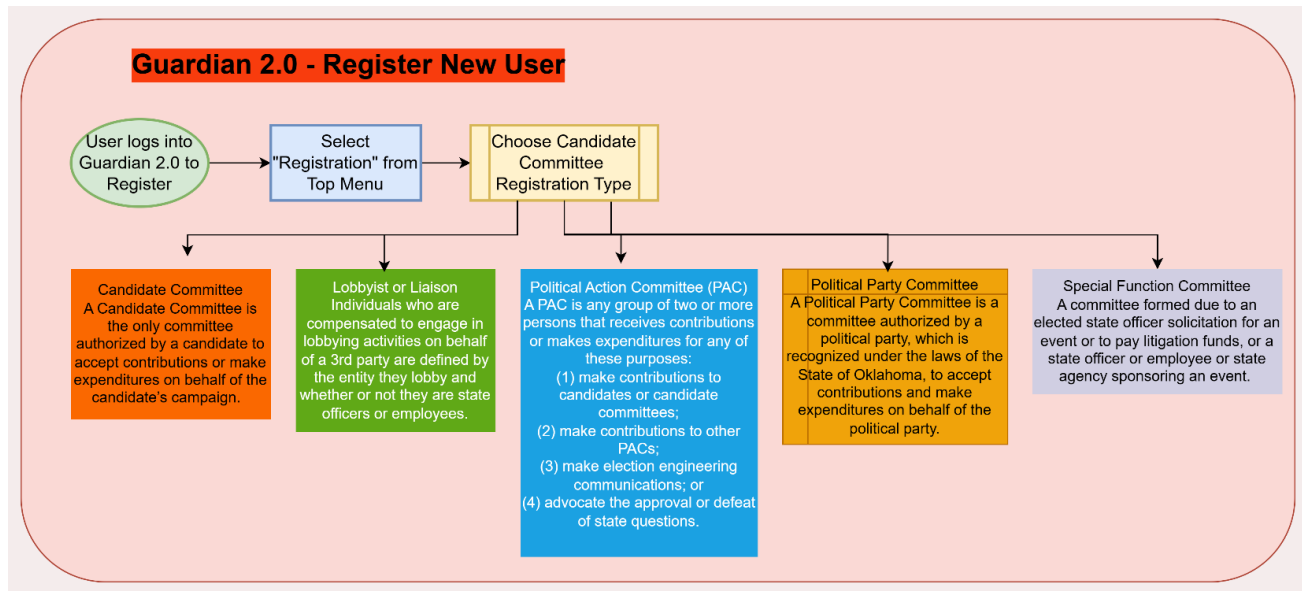


Figure 18 Select Registration Type

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.

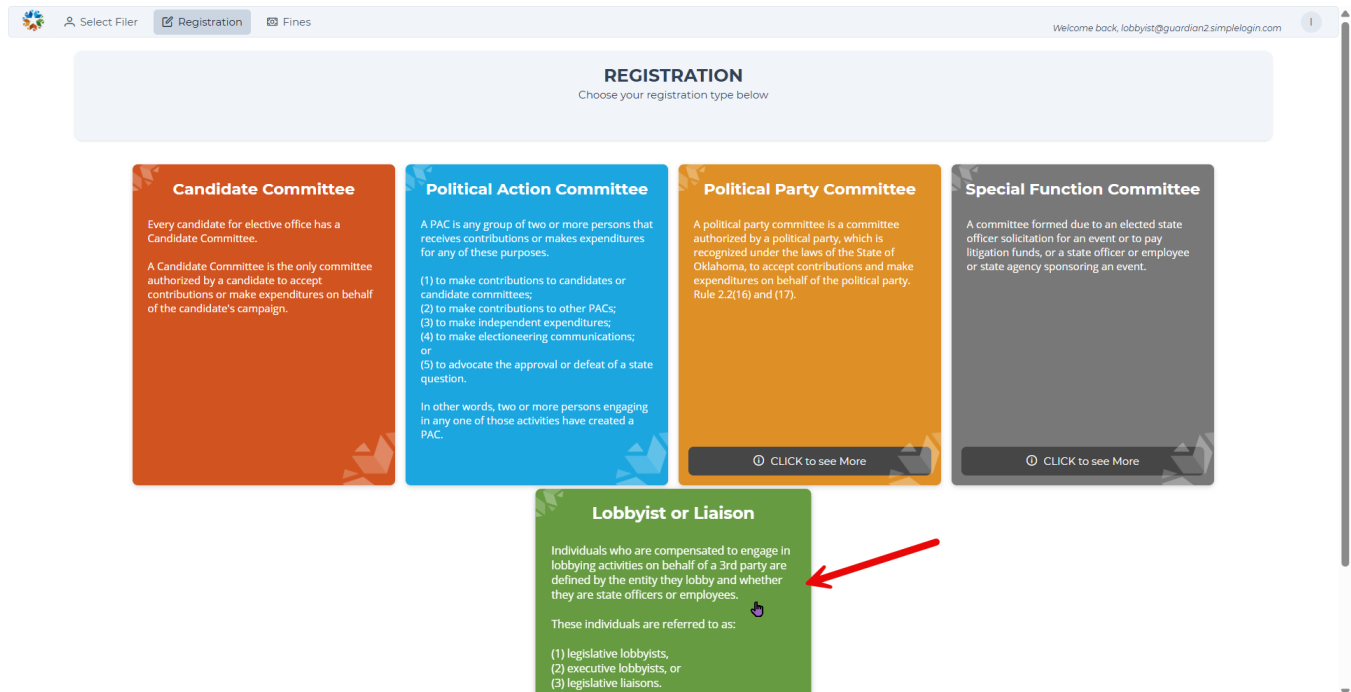


Figure 19 Select Lobbyist Registration Type

Select the Lobbyist Registration Type that best fits your situation. The available options will be displayed, each with a brief description to assist you in making the appropriate selection. If you are uncertain which type applies, consult the system's help resources or reach out to support for guidance.

The screenshot shows the 'LOBBYIST REGISTRATION' screen with the instruction 'Choose your lobbyist type'. Four registration types are listed in colored boxes with descriptions:

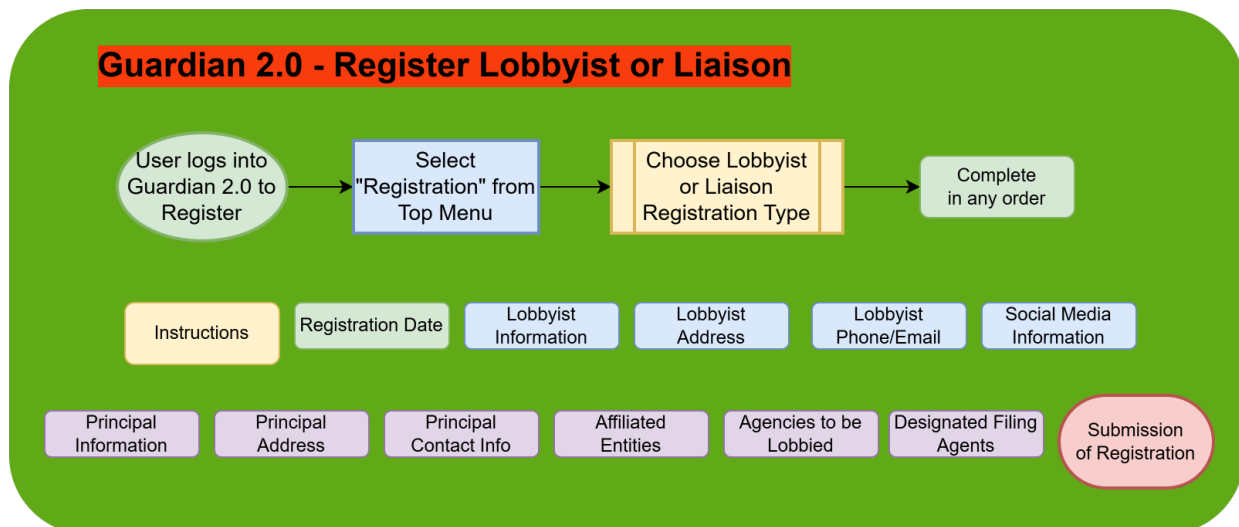
- Liaison** (Orange): Legislative liaisons are state officers and employees whose duties, in fact, include legislative lobbying, regardless of their job title or job description.
- Legislative Lobbyist Only** (Blue): Legislative lobbyists are individuals who are compensated to represent a lobbyist principal(s) by lobbying the Governor, the Legislature, and their staff. Legislative lobbyists are not state officers or employees but may be employees of political subdivisions (counties, municipalities, school or technology center districts).
- Executive Lobbyist Only** (Yellow): Executive lobbyists are individuals who are employed or retained by a lobbyist principal for compensation to lobby state officers and employees of executive agencies.
- Both Legislative and Executive Lobbyist** (Grey): An individual may be both a legislative lobbyist and an executive lobbyist if he or she meets the definitions set forth above. This individual is only required to file one registration with the Ethics Commission and will follow the report filing schedule of a legislative lobbyist.

Four red arrows point to each of these four options. The footer includes: State of Oklahoma | Oklahoma Ethics Commission | About Oklahoma Ethics Commission Electronic Reporting System | Copyright © 2025. All rights reserved. | v0.0.8 - 18d923d4 - 2025-09-18 16:25

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 20 Guardian 2.0 Register Lobbyist or Liaison Workflow



Instructions

Figure 21 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.

The screenshot shows the 'Instructions' screen. 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, Lobbyist Principal, and Submission. The main content area is titled 'Instructions' and contains text explaining the registration process. At the bottom right, there is a blue 'Next' button, which is highlighted by a red arrow.

Registration Information

Figure 22 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' screen. The sidebar is the same as in Figure 21. The main content area is titled 'Registration Information' and contains two dropdown menus: 'Registration Type' (set to 'Legislative Liaison') and 'Registration Year *'. A red error message 'Registration Year is required.' is displayed below the 'Registration Year' field. At the bottom, there are two buttons: 'Previous' and 'Next'. A red arrow points to the 'Next' button.

Lobbyist Information

Figure 23 Lobbyist Information – Name

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

The screenshot shows the 'Lobbyist Information' form with the 'Name' section highlighted. The form includes fields for First Name*, Middle Name, Last Name*, and Suffix. A checkbox labeled 'Name used when Lobbying, if different' is 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 'Lobbyist Information' selected. The top navigation bar includes 'Select Filer', 'Registration', and 'Fines'.

Lobbyist Address

Figure 24 Lobbyist Address

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

The screenshot shows the 'Lobbyist Address' form with the 'Physical Address' section highlighted. The form includes fields for Address Line 1*, Address Line 2, City*, State* (dropdown menu), and Postal Code*. A checkbox labeled 'Mailing address is different than physical address.' is 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 'Lobbyist Address' selected. The top navigation bar includes 'Select Filer', 'Registration', and 'Fines'.

Lobbyist Phone/Email

Figure 25 Lobbyist Phone / Email

Enter Lobbyist 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 "Lobbyist Phone/Email" form within the Guardian 2.0 system. The form is titled "Lobbyist 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". The "Phone Number" section has a text input field for the phone number, a text input field for the extension, and a button labeled "+ Save and Add To List". The "Email" section has a text input field for the email address and a button labeled "+ Save and Add To List". A red asterisk and the text "Required" are shown next to the email input field. At the bottom of the form, there are two buttons: "Previous" and "Next". Red arrows point to the "Phone Number" and "Email" input fields, the "+ Save and Add To List" buttons, and the "Next" button. The left sidebar shows the "Registration Sections" menu with "Lobbyist Phone/Email" selected. The top navigation bar includes "Select Filer", "Registration", and "Fines". The top right corner shows the user's name and the text "Welcome back, lobbyist@guardian2.simplelogin.com".

Lobbyist Social Media

Figure 26 Lobbyist Social Media

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

The screenshot shows the "Lobbyist Social Media" form within the Guardian 2.0 system. The form is titled "Lobbyist Social Media" and includes a dropdown menu for "Social Media Type" and a text input field for "URL". A red asterisk and the text "Required" are shown next to the "URL" input field. Below the input fields, there is a button labeled "+ Save and Add To List". At the bottom of the form, there are two buttons: "Previous" and "Next". Red arrows point to the "Social Media Type" dropdown, the "URL" input field, the "+ Save and Add To List" button, and the "Next" button. The left sidebar shows the "Registration Sections" menu with "Lobbyist Social Media" selected. The top navigation bar includes "Select Filer", "Registration", and "Fines". The top right corner shows the user's name and the text "Welcome back, lobbyist@guardian2.simplelogin.com".

Designated Filing Agents

Figure 27 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 "Save and Add To List." Select the "Next" button to continue to the next screen.

The screenshot shows the "Designated Filing Agents" form. The left sidebar lists "Registration Sections" with "Designated Filing Agents" highlighted. The main form area has a title "Designated Filing Agents" and a description: "A Designated Filing Agent is someone authorized by the lobbyist/liaison to enter data and file reports on their behalf. A designated filer is not required." Below this are input fields for "First Name", "Middle Name", "Last Name", "Suffix" (a dropdown menu), "Phone Number", "Extension", and "Email". At the bottom of the form is a blue button labeled "+ Save and Add to List". Below the form are two blue buttons: "Previous" and "Next". Red arrows point to the "First Name" field, the "+ Save and Add to List" button, and the "Next" button.

Lobby Principal Information

Figure 28 Lobby Principal Information

More than one Lobby Principal can be added. Begin entry by selecting the "Add a New Principal" button. +

The screenshot shows the "Lobbyist Principal" form. The left sidebar lists "Registration Sections" with "Lobbyist Principal" highlighted. The main form area has a title "Lobbyist Principal" and a description: "Now that you have submitted user and contact information, the next step is to enter information for all Principals for whom you will be lobbying. You will need to provide the legal name of lobbyists principals, as well as point of contact information (name, address, and email address) for all lobbyist principals. Once you are done entering information for a principal, click the 'Save Principal' button at the bottom of the page." Below this is a blue button labeled "Add a New Principal". At the bottom of the form are two blue buttons: "Previous" and "Next". A red arrow points to the "Add a New Principal" button.

Figure 29 Principal Type

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

Lobbyist Principal

Now that you have submitted user and contact information, the next step is to enter information for all Principals for whom you will be lobbying. You will need to provide the legal name of lobbyists principals, as well as point of contact information (name, address, and email address) for all lobbyist principals.

Once you are done entering information for a principal, click the "Save Principal" button at the bottom of the page.

Principal Information

Principal Type*
State Agency

Agency Name*

If the agency is not listed, contact the Ethics Commission
(ethics@ethics.ok.gov)

Contact Name

First Name*

Middle Name

Last Name*

Contact Address

Address Line 1*

Figure 30 Lobby Principal Address

When a Principal is added, name and contact information must also be added. Complete the contact information. Then complete address and contact information. After entry, continue to “Principal Entity Information.”

Contact Name

First Name*
Sample

Middle Name

Last Name*
Entry

Contact Address

Address Line 1*
Test

Address Line 2

City*

State*
Oklahoma

Postal Code*

Contact Phone and Email

Phone Number*
Extension

Email*

Figure 31 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 shows the 'Registration Sections' on the left, including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobbyist Principal, and Submission. The main form area is titled 'Contact Phone and Email' and includes fields for Phone Number, Extension, and Email. Below this is the 'Affiliated Entities' section, which contains instructions and a question: 'Is this entity registered with the Secretary of State?'. The question has two radio button options: 'Yes' and 'No'. A red arrow points to the 'Yes' option. Below the question is a '+ Add to List' button, which is highlighted with a red arrow. The 'Agencies to be Lobbied' section is also visible, with instructions and a red box containing a note: 'As you are registering as a Liaison, you must enter Legislation/Governor & Staff as the Agency to be Lobbied, and may enter a single additional Agency to be Lobbied.'

Figure 32 Principal Entity Search

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

The screenshot shows the 'Registration Sections' on the left, including Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobbyist Principal, and Submission. The main form area is titled 'Contact Phone and Email' and includes fields for Phone Number, Extension, and Email. Below this is the 'Affiliated Entities' section, which contains instructions and a question: 'Is this entity registered with the Secretary of State?'. The question has two radio button options: 'Yes' and 'No'. A red arrow points to the 'Yes' option. Below the question is a 'Search Entity Name' field, which is highlighted with a red arrow. To the right of the field is a 'Find Records' button, which is also highlighted with a red arrow. Below the search field is a 'Secretary of State Registration Number*' field and a 'Secretary of State Entity Name*' field. At the bottom of the 'Affiliated Entities' section is a red box containing a note: 'Note: If your entity is not found in the list, please click the "Not Found?" button at the bottom of the results list in the popup.' Below the note is a '+ Add to List' button, which is highlighted with a red arrow. The 'Agencies to be Lobbied' section is also visible, with instructions.


Figure 33 Search Results Selection

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

Secretary of State Search Results			
Entity Name	Registration Number	Action	
	3512472793		
	3513325883		
	3512371768		
	2013826748		
	3612759439		
	3713796748		
	3512727475		
	7512776097		

Figure 34 Affiliated Entities

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



Registration Sections

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

Phone Number *
Extension

Email *

Affiliated Entities

If appropriate, add Affiliated Entities to your Principal by choosing an Entity Type, adding details, then clicking “Add to List”.

If your principal is registered with the Oklahoma Secretary of State, you must search and find it from the records. If your principal is not registered with the Oklahoma Secretary of State, you must enter the official entity name.

Affiliated Entities are not required.

Is this entity registered with the Secretary of State?

☒ Yes

☐ No

Search Entity Name

Sample

Find Records

Secretary of State Registration Number*

Secretary of State Entity Name*

Note: If your entity is not found in the list, please click the “Not Found?” button at the bottom of the results list in the popup.

+ Add to List

Agencies to be Lobbied

Figure 35 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.

The screenshot shows the 'Affiliated Entities' section of the Guardian 2.0 system. The 'No' radio button is selected for the question 'Is this entity registered with the Secretary of State?'. Red arrows point to the 'No' radio button, the 'Entity Name' input field, and the '+ Add to List' button. The 'Agencies to be Lobbied' section is visible below.

Registration Sections

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

Affiliated Entities

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

If your principal is registered with the Oklahoma Secretary of State, you must search and find it from the records. If your principal is not registered with the Oklahoma Secretary of State, you must enter the official entity name.

Affiliated Entities are not required.

Is this entity registered with the Secretary of State?

☐ Yes

☒ No

Entity Name*

+ Add to List Add to List

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 type of agency or legislature and then select the name of the agency from the 'Name' drop down 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.

As you are registering as a Liaison, you must enter Legislation/Governor & Staff as the Agency to be Lobbied, and may enter a single additional Agency to be Lobbied.

Figure 36 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 'Affiliated Entities' section of the Guardian 2.0 system. The 'Yes' radio button is selected for the question 'Is this entity registered with the Secretary of State?'. Red arrows point to the 'Yes' radio button, the 'Search Entity Name' input field, and the 'Find Records' button. The 'Secretary of State Registration Number' and 'Secretary of State Entity Name' input fields are visible below.

Registration Sections

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

Affiliated Entities

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

If your principal is registered with the Oklahoma Secretary of State, you must search and find it from the records. If your principal is not registered with the Oklahoma Secretary of State, you must enter the official entity name.

Affiliated Entities are not required.

Is this entity registered with the Secretary of State?

☒ Yes

☐ No

Search Entity Name

Sample

Find Records

Secretary of State Registration Number*

Secretary of State Entity Name*

Note: If your entity is not found in the list, please click the "Not Found?" button at the bottom of the results list in the popup.

+ Add to List

Agencies to be Lobbied

Figure 37 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.”

Entity Name	Registration Number	Action
SAMPLE	3512472793	Select
	3513325883	Select
	3512371768	Select
	2013826748	Select

Figure 38 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.

Secretary of State Registration Number*

Secretary of State Entity Name*

Note: If your entity is not found in the list, please click the *Not Found* button at the bottom of the results list in the popup.

+ Add to List

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 type of agency or legislature and then select the name of the agency from the *Name* drop down 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.

As you are registering as a Liaison, you must enter Legislation/Governor & Staff as the Agency to be Lobbied, and may enter a single additional Agency to be Lobbied.

Agency Type *

+ Add to List

Previous Save Principal Clear Form Next

Submission

Figure 39 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 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 options: Instructions, Registration Information, Lobbyist Information, Lobbyist Address, Lobbyist Phone/Email, Lobbyist Social Media, Designated Filing Agents, Lobbyist Principal, and Submission. The top navigation bar includes 'Select Filer', 'Registration', and 'Fines'. The user is logged in as 'lobbyist@guardian2.simplelogin.com'.

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 40 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.

The screenshot shows the 'Select a Filer' screen in the Guardian 2.0 system. The screen displays a table with columns: Filer ID, Filer Name, Filer Type, Status, and Action. A single row is shown with Filer ID 100000047, Filer Name (redacted), Filer Type CANDIDATE, Status Pending Approval, and an Action button labeled 'Select'. The top navigation bar includes 'Select Filer' and 'Registration'. The user is logged in as 'rbarbosa@rfdinc.com'.

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 Expenditures

Figure 41 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.

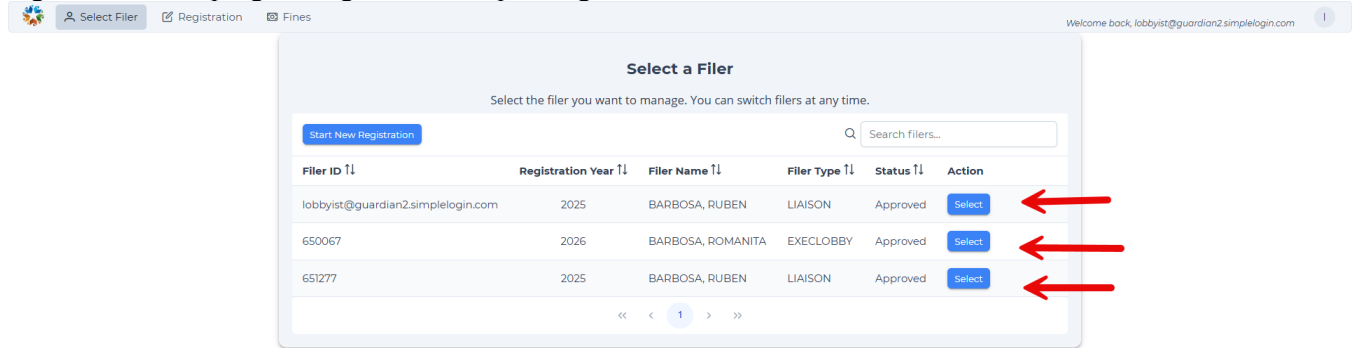


Figure 42 Filing Reports Option

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

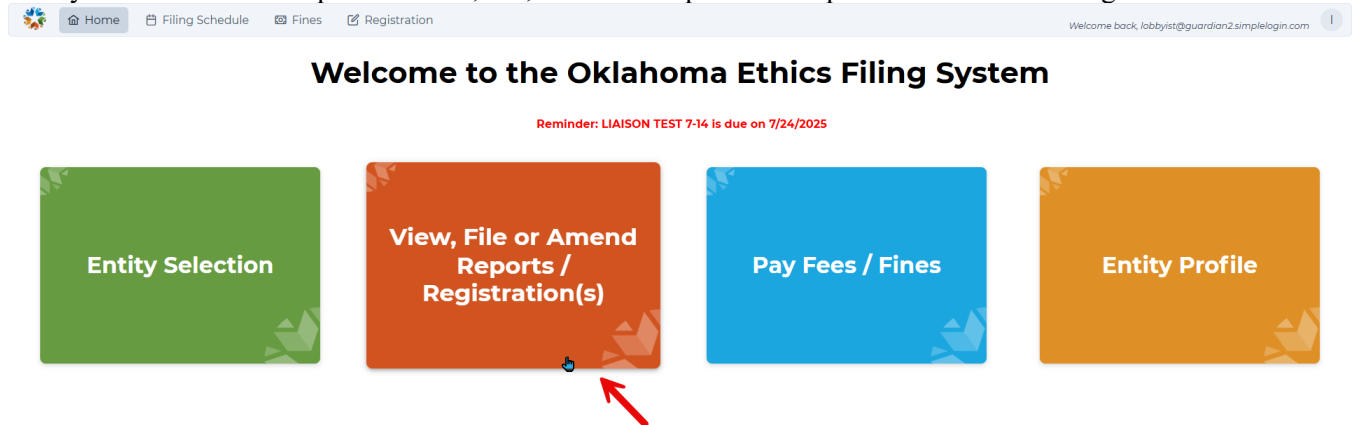


Figure 43 Start Work on New Filing Event

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

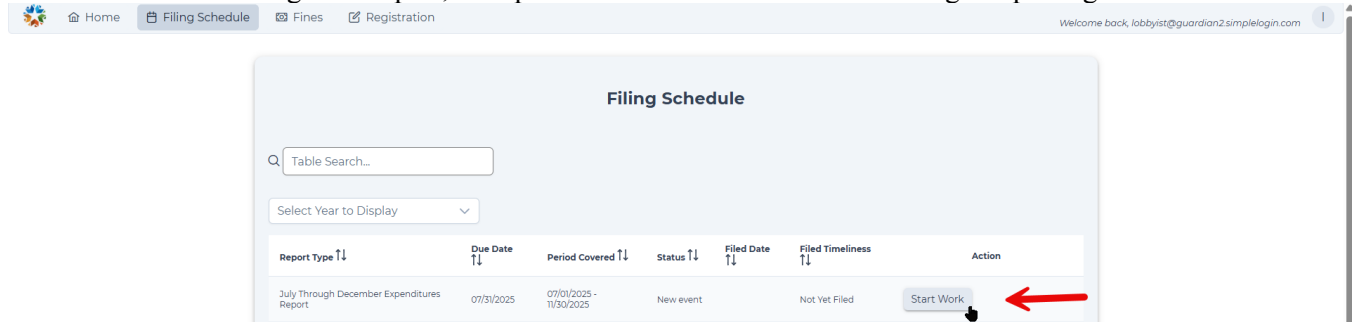


Figure 44 Will you be Filing Activity during that Reporting Period?

Filer will be asked if they have activity to Report for that specific period, if Filer wishes to terminate their Registration,

←

Cover Page
View PDF
Run Audit
Submit Report

Filer Information	Report Name	Period Covered	Report Due Date
	January Lobby Expenditures Report	01/01/2025 - 01/31/2025	04/30/2025

Do you have Activity to report for this period? ☐ No ☒ Yes

Do you wish to terminate this Lobbyist Registration? ☒ No ☐ Yes

Other Lobbyist Reporting? ☒ No ☐ Yes

Next

Figure 5045 Reporting of Other Lobbyist

If some or all expenditures are reported by another lobbyist, the lobbyist(s) or liaison(s) reporting the expenditures must be identified. For each other lobbyist reporting, enter the lobbyist and principal names below, and click Add to List.

Other Lobbyist Reporting? ☐ No ☒ Yes

If some or all expenditures are reported by another lobbyist, the lobbyist(s) or liaison(s) reporting the expenditures must be identified. For each other lobbyist reporting, enter the lobbyist and principal names below, and click Add to List.

Lobbyist Name:

Lobbyist Principal:

Add to List

Figure 5046 Begin Work Filing Expenditures

Filers will be able to navigate through the left tab for all the expenditure options that may be applicable for the Filer to submit. The Filer should select the type of activity they wish to report from the distinct types of expenditures.

Expenditures Summary

Date	Recipient	Amount	Purpose
No expenditures found Expenditures will appear here once added			

Figure 5147 Begin Work Filing Expenditures

Under Maintain Recipients, Filers will be able to see who is a recipient of one of the submitted expenditures.

Maintain Recipients

These recipients are created when you choose to add a new recipient to an Expenditure. You can edit or delete them here.

Name ↑↓	ID ↑↓	Type ↑↓	Political Office ↑↓	Actions
	100000381	Individual	N/A	

Showing 1 to 1 of 1 entries << < 1 > >> 10 ▾

Figures 52, 53, & 5448 Entering Lobbyist or Liaison Expenditures

The Filer should select the type of activity they wish to report from the list of Expenditures.

The image displays the Guardian 2.0 System Onboarding Guide interface for entering lobbyist or liaison expenditures. The left sidebar shows a navigation menu with the following items: Cover Page, Summary, Maintain Recipients, Lobbyist or Liaison Expenditures (circled in red), Lobbyist Principal Expenditures, Caucus Event, Committee / Subcommittee Event, Legislative Events, Out of State Event, Plaques or Similar Gifts, View PDF, and Submit Report. Three red arrows point from the 'Lobbyist or Liaison Expenditures' menu item to three separate form panels:

- Gifts to Family Member of State Officer or Employee**: This form includes fields for Expenditure Date *, Expenditure Amount *, and Explanation *. It also has a Recipient Information section with a Type * dropdown menu. Buttons for Cancel and Save are at the bottom.
- Gifts to State Officer or Employee**: This form includes fields for Expenditure Date *, Expenditure Amount *, and Explanation *. It also has a Recipient Information section with a Type * dropdown menu. Buttons for Cancel and Save are at the bottom.
- Meals and Other Food and Beverage**: This form includes fields for Description *, Expenditure Date *, Expenditure Amount *, and Explanation *. It also has a Recipient Information section with a Type * dropdown menu. Buttons for Cancel and Save are at the bottom.

Figures 49, 56, & 57 Complete the Lobbyist Principal Expenditure Activity

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

The image displays three screenshots of the Guardian 2.0 System Onboarding Guide, showing the process of recording lobbyist principal expenditures. A red circle highlights the 'Lobbyist Principal Expenditures' menu item in the left sidebar, with red arrows pointing to the three forms shown below.

Caucus Event

*** Required**

Event Information

Expenditure Date *

Event Location *

Caucus *

Event Country *

United States

Explanation *

Event State *

Oklahoma

Event City *

Provide the cost and percentage of food and beverage this Principal paid towards the Event.

Principals Food & Beverage Cost *

Principals Food & Beverage Percentage (0-100) *

Principal *

Cancel Save

Committee / Subcommittee Event

*** Required**

Event Information

Expenditure Date *

Event Location *

Committee Name *

Event Country *

United States

Explanation *

Event State *

Oklahoma

Event City *

Provide the cost and percentage of food and beverage this Principal paid towards the Event.

Principals Food & Beverage Cost *

Principals Food & Beverage Percentage (0-100) *

Principal *

Cancel Save

Events to which all Legislators are invited

*** Required**

Event Information

Expenditure Date *

Event Location *

Explanation *

Event Country *

United States

Event State *

Oklahoma

Event City *

Provide the cost and percentage of food and beverage this Principal paid towards the Event.

Principals Food & Beverage Cost *

Principals Food & Beverage Percentage (0-100) *

Principal *

Cancel Save

Figures 58 & 59 Complete the Lobbyist Principal Expenditure Activity (continued)

Out of State Event

*** Required**

Event Information

Expenditure Date *	Event Location *
Explanation *	Event Country * United States
<small>Provide the cost and percentage of food and beverage this Principal paid towards the Event.</small>	Event State * Oklahoma
Principals Food & Beverage Cost *	Event City *
Principals Food & Beverage Percentage (0-100) *	
Principal *	

Cancel Save

Plaques or Similar Gifts

*** Required**

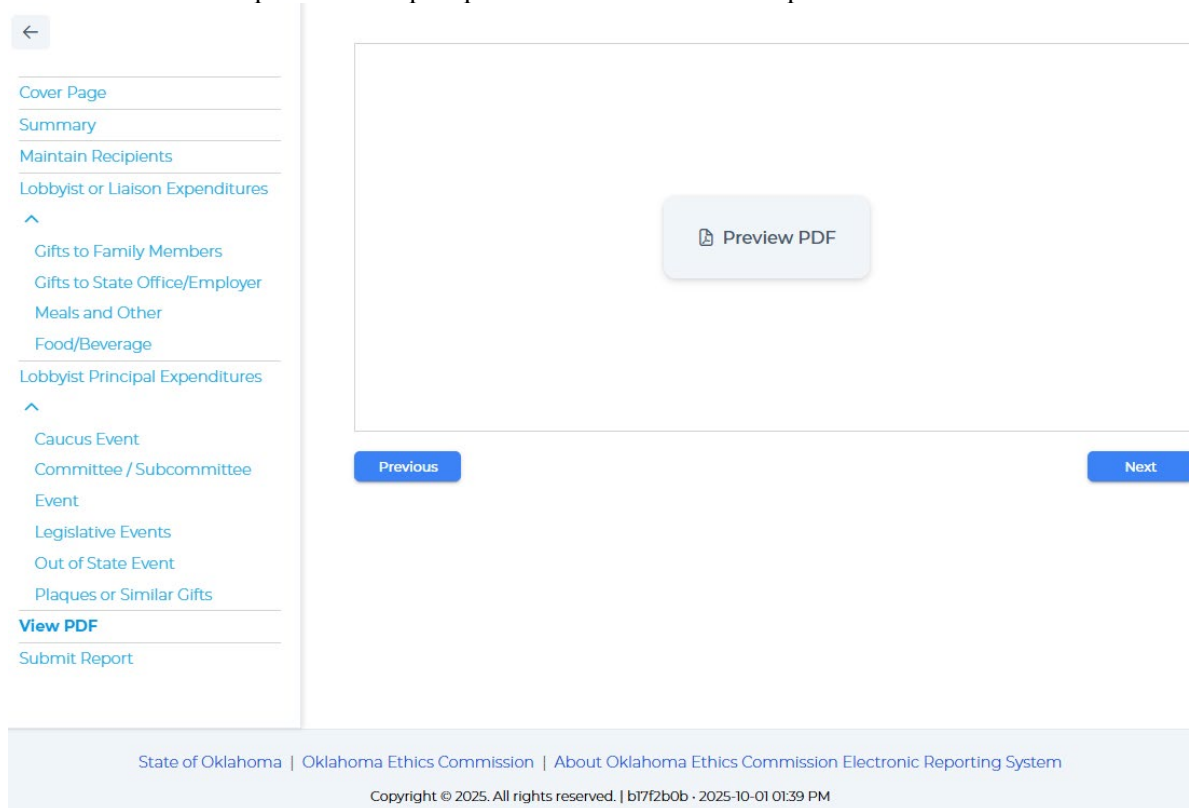
Recipient Information

Expenditure Date *	Type *
Explanation *	
Cost *	
Principal *	

Cancel Save

Figure 60 View PDF

Users view the anticipated PDF report prior to Submission of a Report



Submitting Expenditure Reports

Figure 50 Submit Report to Preview or Submit and Esign

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

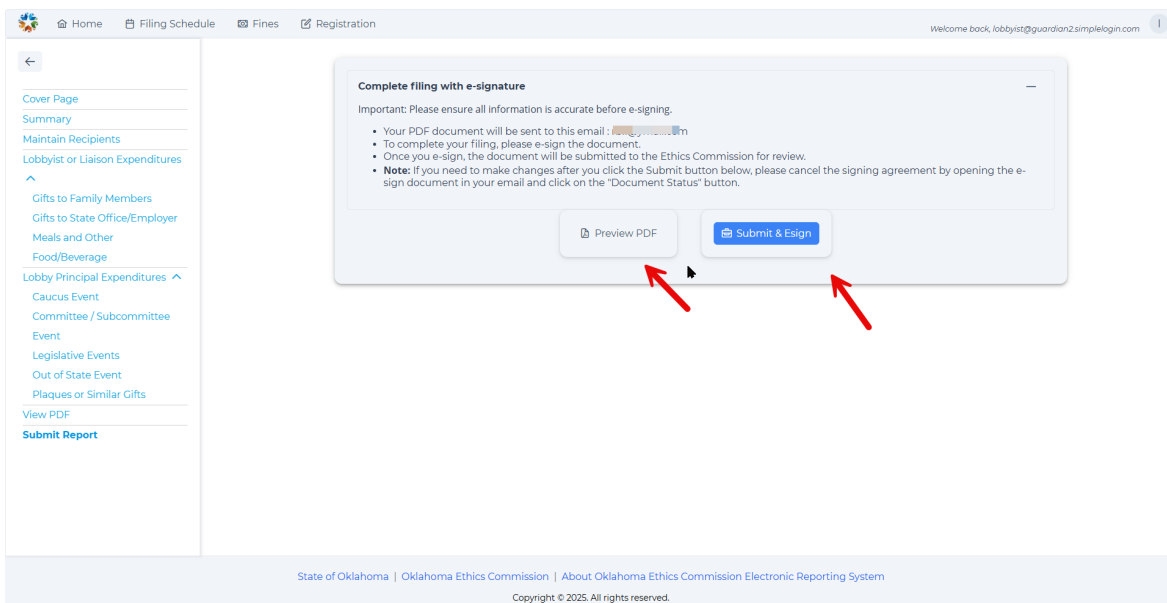


Figure 6251 Complete Esign of PDF

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.

The screenshot shows the Guardian 2.0 System Onboarding Guide interface. The left sidebar contains a navigation menu with the following items: Cover Page, Summary, Maintain Recipients, Lobbyist or Liaison Expenditures (expanded), Gifts to Family Members, Gifts to State Office/Employer, Meals and Other, Food/Beverage, Lobby Principal Expenditures (expanded), Caucus Event, Committee / Subcommittee, Event, Legislative Events, Out of State Event, Plaques or Similar Gifts, View PDF, and Submit Report. The main content area displays the 'Complete filing with e-signature' section. It includes an 'Important' note about ensuring accurate information before e-signing, followed by three bullet points: 'Your PDF document will be sent to this email', 'To complete your filing, please e-sign the document', and 'Once you e-sign, the document will be submitted to the Ethics Commission for review'. A 'Note' states that if changes are needed after clicking the Submit button, the user should cancel the signing agreement by opening the e-sign document in their email and clicking on the 'Document Status' button. Below this, the 'Esign' section shows the 'Current Document status: Out For Signature'. The 'E-sign Instructions' section prompts the user to 'Please check your email' or 'Click the button below to complete e-sign'. Two buttons are visible: 'Complete Esign' (highlighted with a red arrow) and 'Document Status'.

Figure 63 View and Esign PDF

The screenshot displays the Oklahoma Ethics Commission Lobbyist or Liaison Expenditure Report PDF document. The header includes the Oklahoma Ethics Commission logo, the text 'Powered by Adobe Acrobat Sign', and a '[DEMO USE ONLY]' watermark. The report title is 'OKLAHOMA ETHICS COMMISSION LOBBYIST OR LIAISON EXPENDITURE REPORT'. The 'AMENDED: NO' status is indicated. The report includes fields for 'Full Legal Name (Last, First, Middle)', 'Ethics Number 1', 'Lobbyist or Liaison', 'Reporting Period: 07/01/2022 - 11/30/2022', and 'Year'. The 'Verification of information on Registration' section contains three checkboxes, all of which are checked: 'Verification of information on Registration', 'Other Lobbyist Reporting', and 'FINAL REPORT'. The 'Lobbyist or Liaison Expenditures Summary' table shows the following data:

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

The 'Lobbyist Principal's Expenditures Summary' section includes a note: '(Note these totals may include multiple lobbyist principals)'. The table shows the following data:

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

A blue button with the text '1 required field remaining' and a right arrow is located at the bottom of the report.

Figure 52 Click to Sign PDF

Powered by Adobe Acrobat Sign

[DEMO USE ONLY]

Options

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: _____

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 535 PDF Options to Decline and Other Options

Powered by Adobe Acrobat Sign

[DEMO USE ONLY]

Options

OKLAHOMA ETHICS COMMISSION

PHONE: (405) 521-3451 • FAX: (405) 521-4895 • WEBSITE: WWW.OK.GOV/ETHICS

LOBBYIST OR LIAISON EXPENDITURE REPORT

AMENDED: NO

Full Legal Name (Last, First, Middle): _____

Reporting Period: 07/01/2022 - 11/30/2022

Year: _____

☒ 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

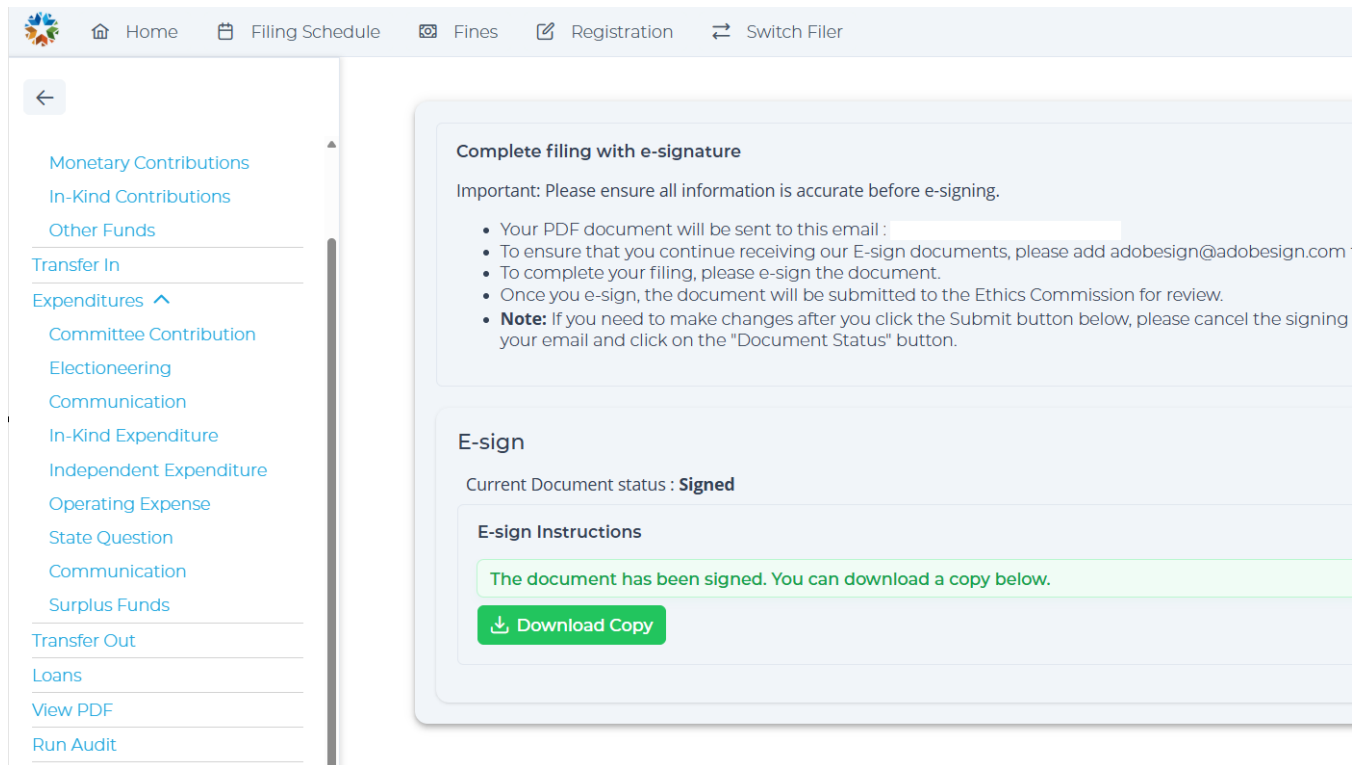
Lobbyist Principal's Expenditures Summary (Note these totals may include multiple lobbyist principals).

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

Options:

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

Figure 66 Option to Download copy of Signed PDF*Figure 547 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.

