

Oklahoma Ethics Commission



Oklahoma Ethics Commission Guardian 2.0 System Onboarding Guide Political Action 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 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

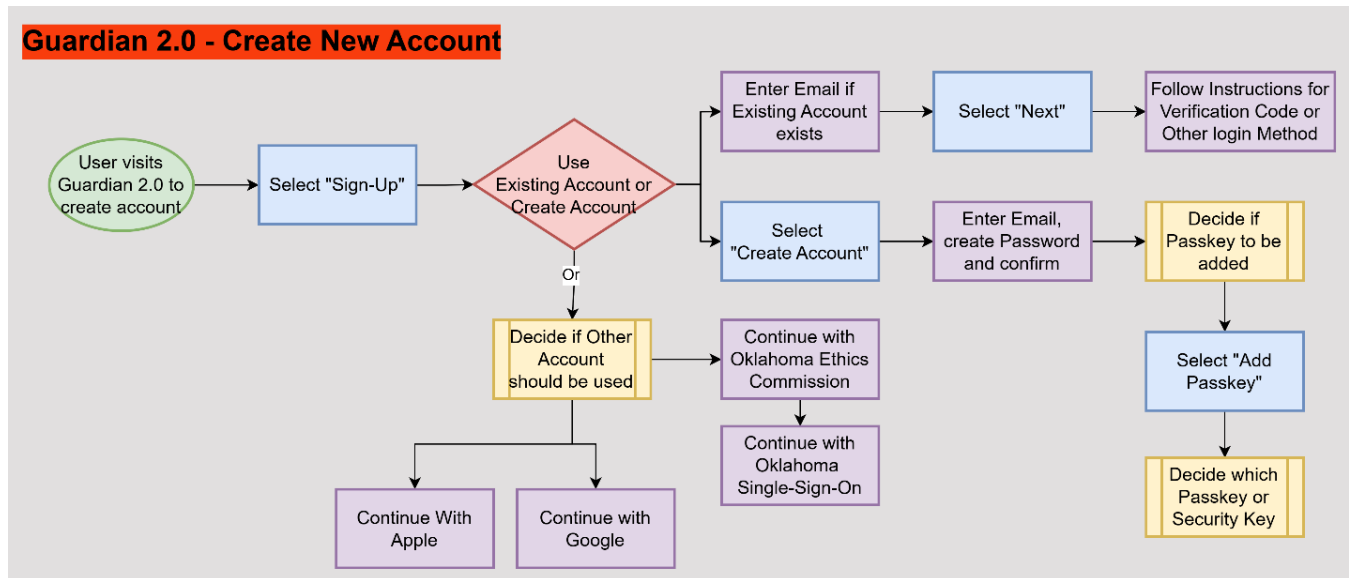


Figure 2 The Guardian 2.0 Landing Page

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.

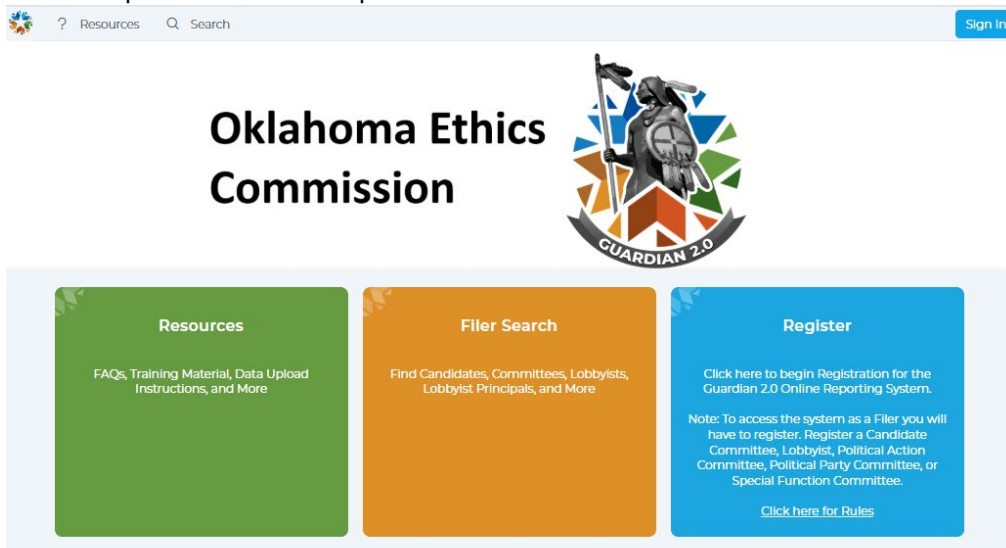


Figure 3 Select Sign In to Create Account

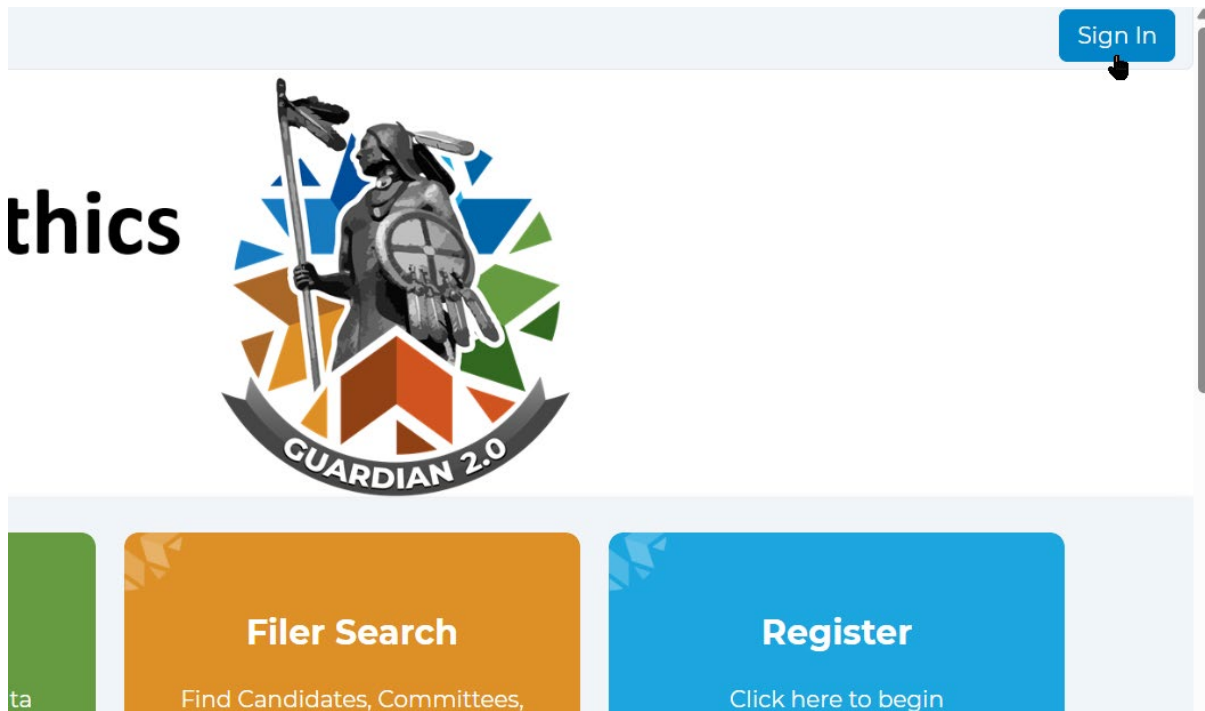


Figure 4 Enter Email to Create Account

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.

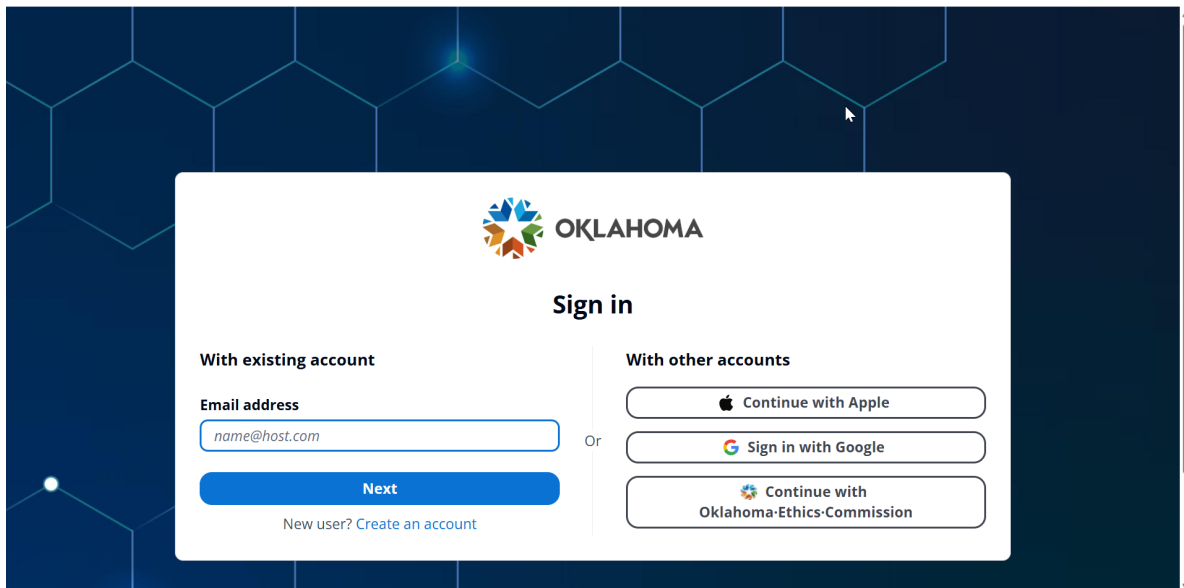
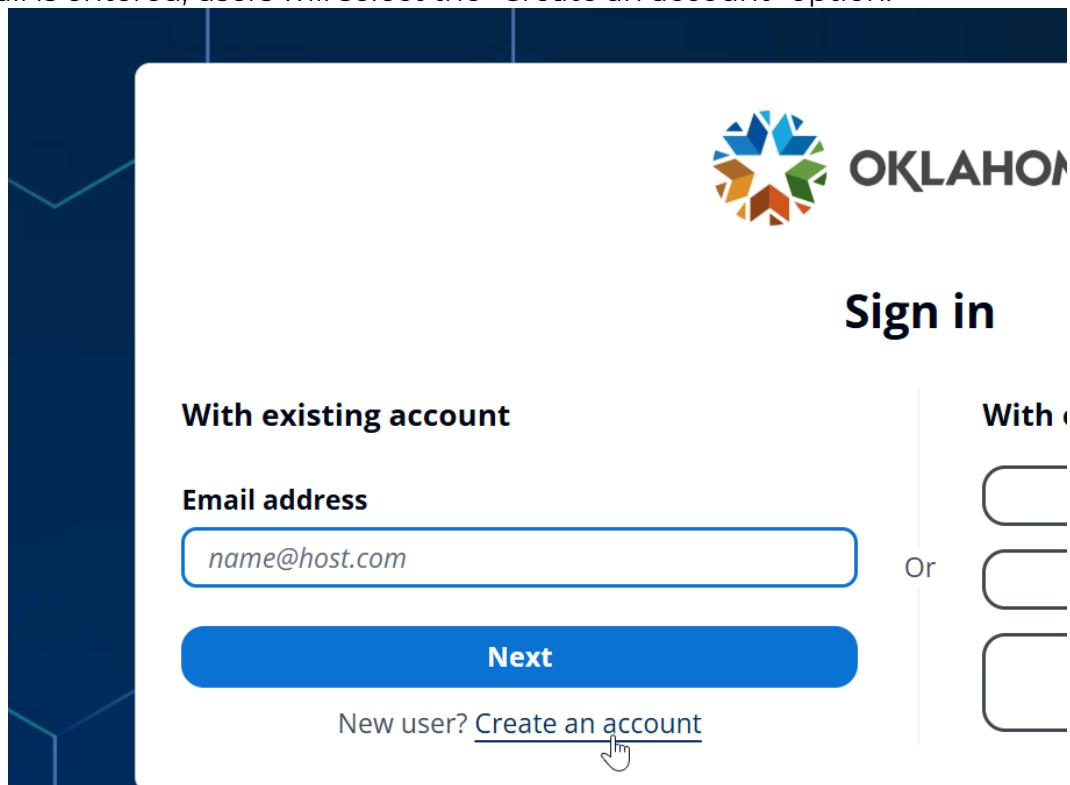


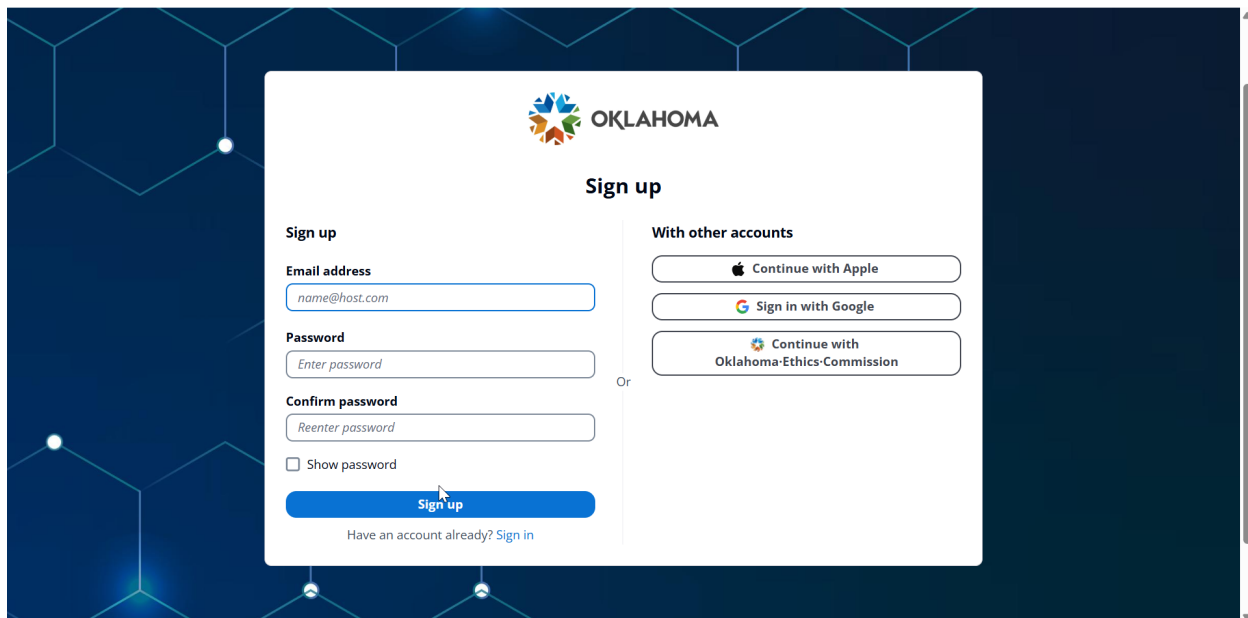
Figure 5 Select Create Account

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. Under 'With existing account', 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. To the right of the 'Next' button is the word 'Or' and three empty input fields for social login options.

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. Under 'Sign up', there are three input fields: 'Email address' (containing 'name@host.com'), 'Password' (containing 'Enter password'), and 'Confirm password' (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](#)'. Under 'With other accounts', there are 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 input fields: "Email address" and "Password". The "Password" field is followed by a list of password requirements, each with a green checkmark: "Password must be at least 8 characters", "Use a number", "Use a lowercase letter", "Use an uppercase letter", and "Use a symbol". To the right of the password requirements, there is a vertical line with the word "Or" below it. Further right, there is a "Sign up" button. Below the button, there is 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. At the top, the OKLA logo is visible. Below it, there is a green box with a checkmark and the text "Your registration has been confirmed!". The main heading is "Set up sign-in with a passkey". Below the heading, there is a blue button labeled "Add passkey" and a link labeled "Not now". To the right of the "Add passkey" button, there is a vertical line with the word "Or" below it. Further right, there is a "Sign up" button. Below the button, there is a link that says "Have an account already? Sign in".

Figure 7 Passkey Creation via Google Password Manager

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

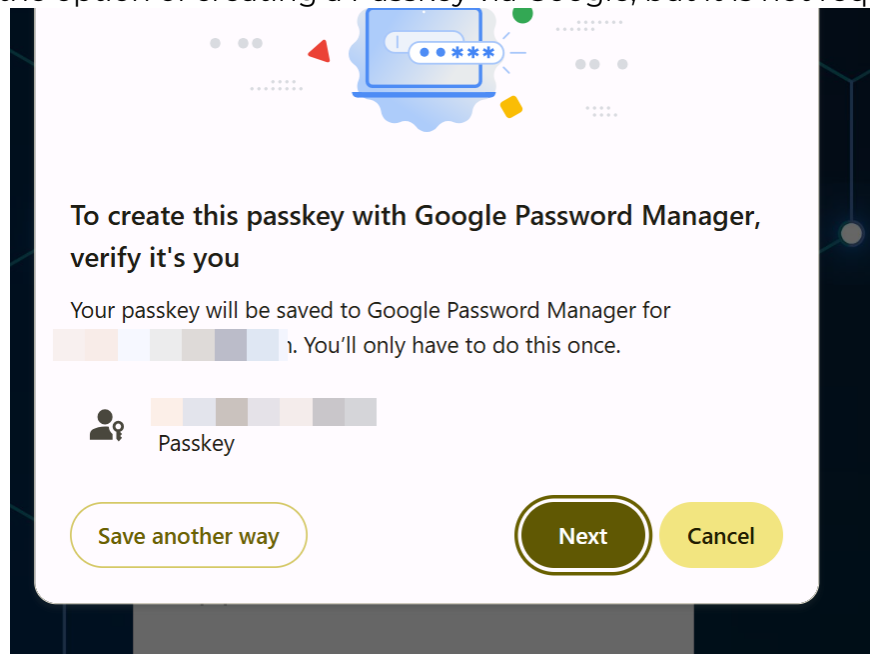
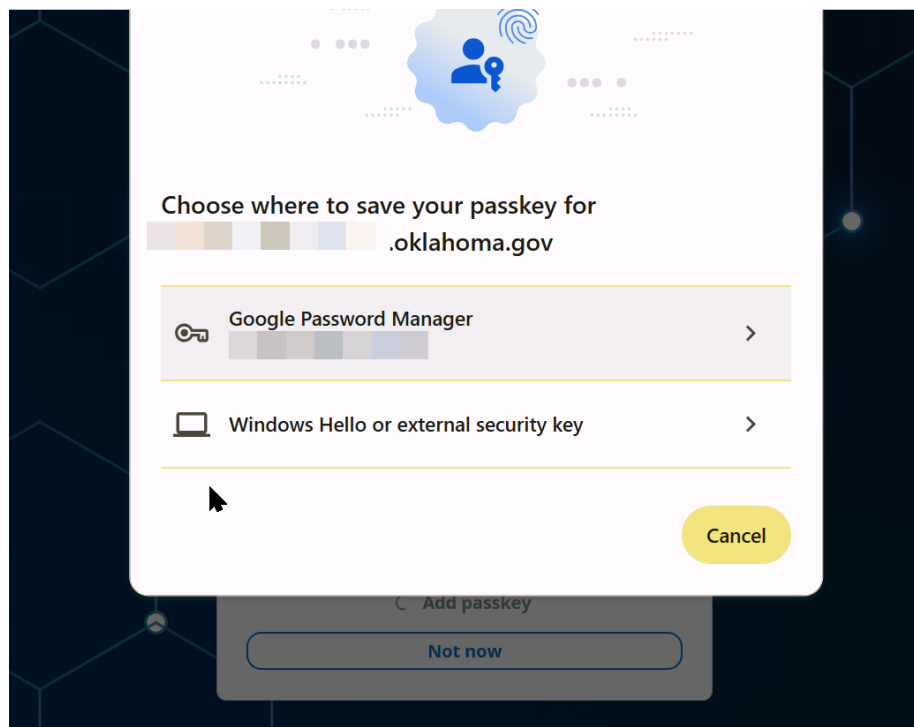


Figure 8 Passkey Setup



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

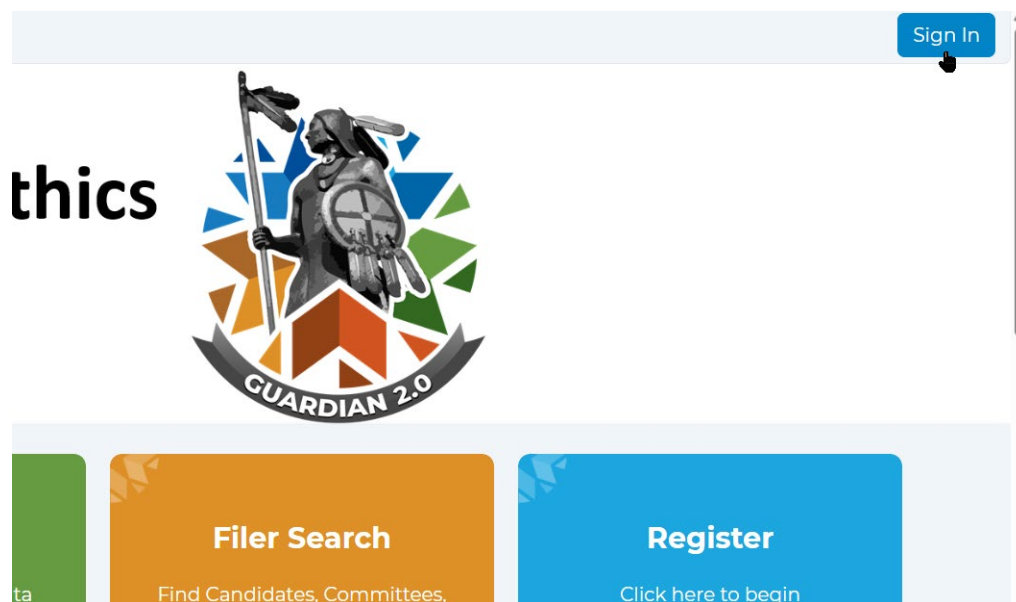


Figure 11 Existing Account Login Enter Email or select “Create an Account”

The screenshot shows the 'Sign in' screen for the Oklahoma Guardian 2.0 system. At the top is the Oklahoma logo, a colorful star, followed by the word 'OKLAHOMA'. Below the logo is the heading 'Sign in'. The screen is divided into two main sections: 'With existing account' and 'With other accounts'. In the 'With existing account' section, there is a label 'Email address' with a cursor pointing to it, a text input field containing 'name@host.com', and a blue 'Next' button. Below the 'Next' button is a link: 'New user? [Create an account](#)'. In the 'With other accounts' section, there are three buttons: 'Continue with Apple', 'Sign in with Google', and 'Continue with Oklahoma Ethics Commission'.

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

The screenshot shows the 'Check your email' screen for the Oklahoma Guardian 2.0 system. At the top is the Oklahoma logo, a colorful star, followed by the word 'OKLAHOMA'. Below the logo is the heading 'Check your email'. There is an icon of an envelope with a code '1234' and a message: 'Enter the code that we sent to the email address r***@y***. The code expires in 15 minutes.' Below this is a label 'Verification code' and a text input field with the placeholder 'Enter code'. There are two buttons: a blue 'Continue' button and a white 'Back' button. Below these buttons is a horizontal line with the word 'OR' in the center. At the bottom is a button labeled 'Try another way'.

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

OKLAHOMA

Choose a sign-in method

☒ Email one-time password

☐ Password

Continue

Back

OKLAHOMA

Choose a sign-in method

☐ Email one-time password

☒ Password

Continue

Back

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

OKLAHOMA

Enter your password

Password

.....

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

Continue

Back

OKLAHOMA

Forgot your password?

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

Email address

name@host.com

Reset my password

Back

V. Registration

Figure 17 Guardian 2.0 System Registration Workflow

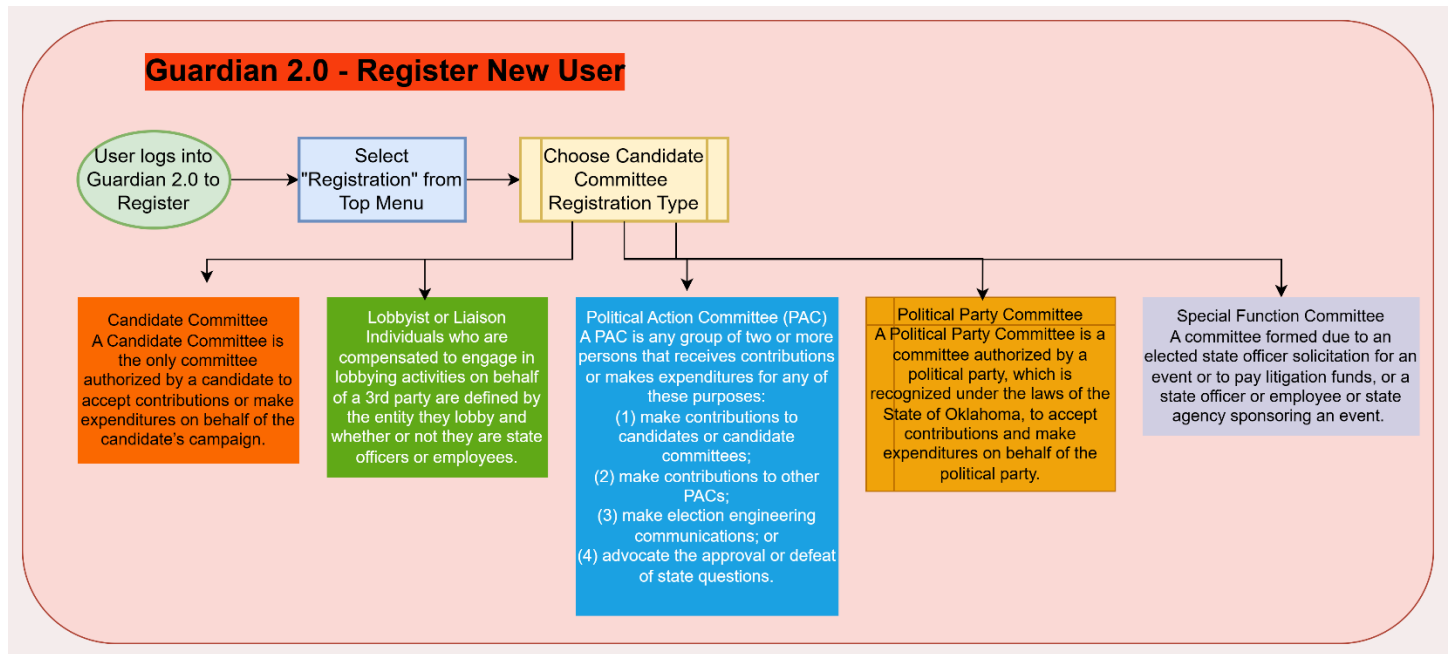
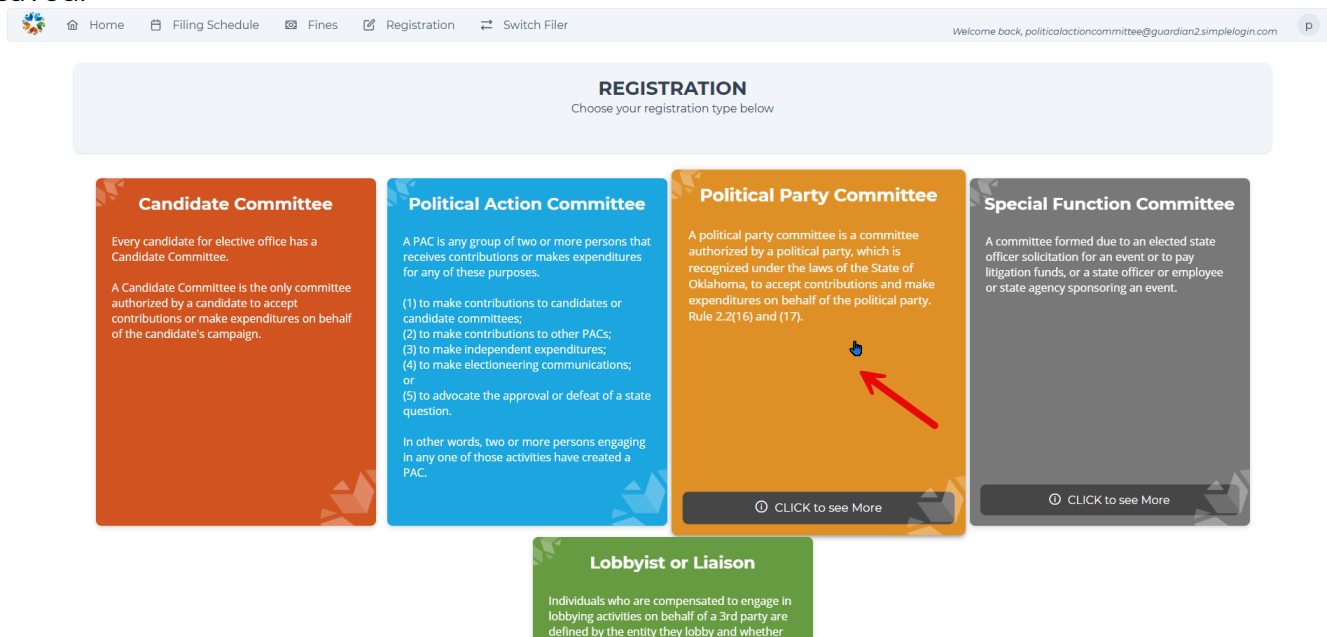


Figure 18 Select Registration Type

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.



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.

Figure 19 Guardian 2.0 Register Political Action Committee Workflow

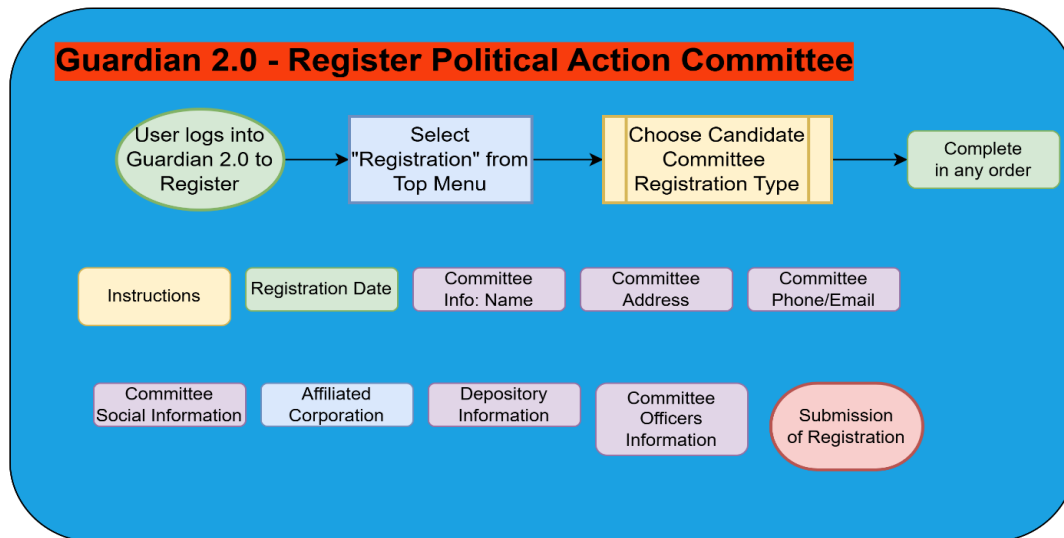
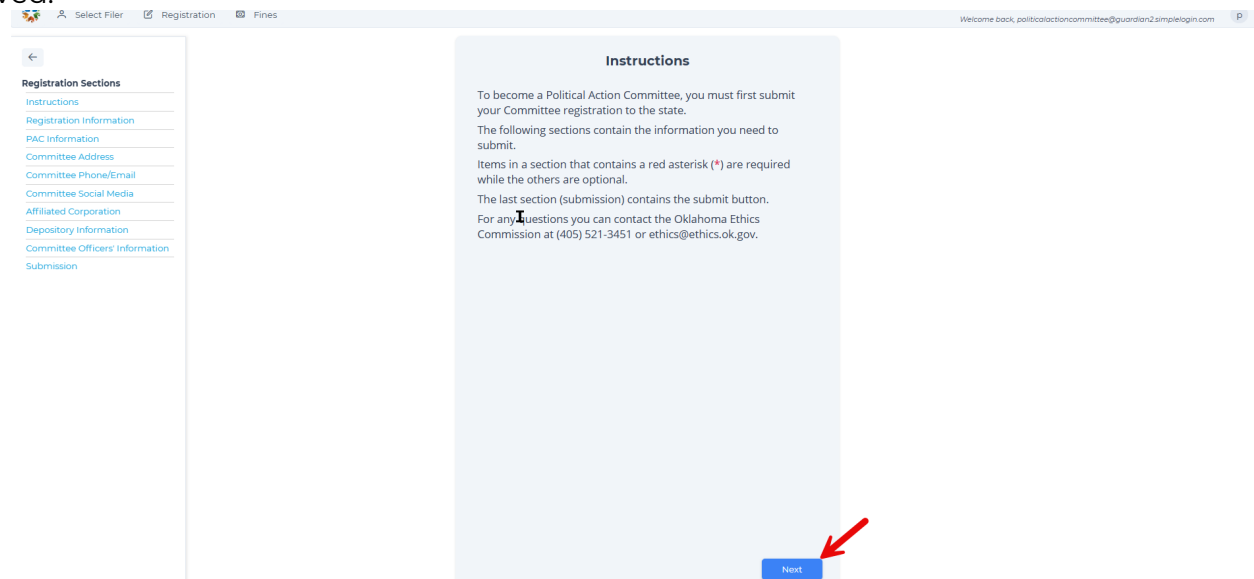


Figure 20 Political Action Committee Instructions – Select Next or Jump to each item

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.



Registration

Figure 21 PAC Registration Information

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

The screenshot shows the 'Registration Information' form. On the left is a sidebar with 'Registration Sections' including Instructions, Registration Information, PAC Information, Committee Address, Committee Phone/Email, Committee Social Media, Affiliated Corporation, Depository Information, Committee Officers' Information, and Submission. The main form has a 'Registration Year' dropdown menu with options for 2024 and 2025. A red arrow points to the 2025 option. At the bottom of the form are 'Previous' and 'Next' buttons. Another red arrow points to the 'Next' button.

Committee Name and Type

Figure 22 PAC Information

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

The screenshot shows the 'PAC Information' form. The sidebar is the same as in Figure 21. The main form contains two numbered instructions about Limited and Unlimited Committees. Below the instructions are four input fields: 'PAC Type' (a dropdown menu), 'Committee Full Name', 'Acronym', and 'Purpose'. A red error message 'PAC Type is required.' is shown below the dropdown. Red arrows point to the dropdown menu, the 'Committee Full Name' field, the 'Purpose' field, and the 'Next' button at the bottom. The 'Next' button is labeled 'Next'.

Committee Address

Figure 23 PAC Address

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

The screenshot shows the "Committee Address" form within the Guardian 2.0 system. The form is titled "Committee Address" and contains a section for "Physical Address". 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 present below the fields. A red asterisk and the text "* - Required" are shown at the bottom right of the form. The form is part of a larger interface with a left sidebar titled "Registration Sections" containing links like "Instructions", "Registration Information", "PAC Information", "Committee Address" (which is highlighted), "Committee Phone/Email", "Committee Social Media", "Affiliated Corporation", "Depository Information", "Committee Officers' Information", and "Submission". At the bottom of the form, there are two buttons: "Previous" and "Next". Red arrows point to the "Address Line 1" field and the "Next" button.

Committee Phone/Email

Figure 24 PAC Phone / Email

Complete PAC Phone and Email entry 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 within 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. The first section is for "Phone Number" with fields for "Phone Number*" and "Extension", followed by a button labeled "+ Save and Add to List". The second section is for "Email" with a field for "Email*" and a button labeled "+ Save and Add to List". A red asterisk and the text "* - Required" are shown at the bottom right of the form. The form is part of a larger interface with a left sidebar titled "Registration Sections" containing links like "Instructions", "Registration Information", "PAC Information", "Committee Address", "Committee Phone/Email" (which is highlighted), "Committee Social Media", "Affiliated Corporation", "Depository Information", "Committee Officers' Information", and "Submission". At the bottom of the form, there are two buttons: "Previous" and "Next". Red arrows point to the "Phone Number" field, the "+ Save and Add to List" button, the "Email" field, the "+ Save and Add to List" button, and the "Next" button.

Committee Social Media

Figure 25 PAC Social Media Information

Enter PAC 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, PAC Information, Committee Address, Committee Phone/Email, Committee Social Media (highlighted), Affiliated Corporation, Depository Information, Committee Officers' Information, and Submission. The main form area has a title "Committee Social Media" and a dropdown for "Social Media Type". Below it is a "URL" input field. A red arrow points to the "+ Save and Add to List" button. Another red arrow points to the "Next" button at the bottom right. A "Previous" button is at the bottom left. A red asterisk and "Required" text are next to the "Save and Add to List" button. The top navigation bar includes "Select Filer", "Registration", and "Fines". The top right shows a welcome message and a user profile icon.

Affiliated Corporation

Figure 26 PAC Affiliated Corporation Information

This information is required if the PAC is affiliated with a corporation or a labor union. Complete the entry or if no affiliation exists, continue to submit the registration.

The screenshot shows the "Affiliated Corporation" form. On the left is the same sidebar as in Figure 25, with "Affiliated Corporation" highlighted. The main form area has a title "Affiliated Corporation" and a note: "This section is required only if this PAC is affiliated with a Corporation or Labor Union." Below this are input fields for "Name", "Address Line 1", "Address Line 2", "City", "State" (a dropdown menu showing "Oklahoma"), and "Postal Code". There is a checkbox for "Mailing address is different than residence address." Below this is a section titled "Contact Information" with input fields for "Phone Number", "Extension", "Email", and "Website". Red arrows point to the "Name" field, the "Extension" field, and the "Next" button at the bottom right. A "Previous" button is at the bottom left. The top navigation bar and welcome message are the same as in Figure 25.

Depository Information

Figure 27 PAC 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 in the Guardian 2.0 system. The form is titled "Depository Information" and includes a description: "A depository is a financial institution that regularly conducts business in the state where the committee will maintain an account. At least one Depository is Required." The form fields include: "Depository Name: *" (text input), "Address Line 1*" (text input), "Address Line 2" (text input), "City*" (text input), "State*" (dropdown menu with "Oklahoma" selected), and "Postal Code*" (text input). Below the fields is a button labeled "+ Save and Add to List". At the bottom of the form are two buttons: "Previous" and "Next". Red arrows point to the "Depository Name" field, the "+ Save and Add to List" button, and the "Next" button. On the left side of the screen, there is a sidebar with "Registration Sections" including: Instructions, Registration Information, PAC Information, Committee Address, Committee Phone/Email, Committee Social Media, Affiliated Corporation, Depository Information (highlighted), Committee Officers' Information, and Submission.

Committee Officers' Information

Figure 28 PAC Committee Officers Information – Role

Users are required to add at least one Chairperson and one Treasurer. Select the list to begin entering the officers' information and for each entry, select "Save and Add to List."

The screenshot shows the "Committee Officers' Information" form in the Guardian 2.0 system. The form is titled "Committee Officers' Information" and includes a description: "Registering a Political Action 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." The form has a "Role *" dropdown menu. Below the dropdown is a button labeled "+ Save and Add to List". At the bottom of the form are two buttons: "Previous" and "Next". Red arrows point to the "Role" dropdown, the "+ Save and Add to List" button, and the "Next" button. On the left side of the screen, there is a sidebar with "Registration Sections" including: Instructions, Registration Information, PAC Information, Committee Address, Committee Phone/Email, Committee Social Media, Affiliated Corporation, Depository Information, Committee Officers' Information (highlighted), and Submission.

Figures 29 & 35 Political Action Committee - Committee Officers Information

Committee Officers' Information

Registering a Political Action 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.

Role *

- Chairperson
- Treasurer
- Deputy Treasurer
- Designated Filing Agent

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.

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.

Committee Officers' Information

Registering a Political Action 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.

Role *

Chairperson

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

Previous

Next

Submission

Figure 30 Political Action Committee - User Submission

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 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'.

Registration Sections

- Instructions
- Registration Information
- PAC Information
- Committee Address
- Committee Phone/Email
- Committee Social Media
- Affiliated Corporation
- Depository Information
- Committee Officers' Information
- Submission**

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 31 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 of pending registrations. The table has columns for 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 Action Select. The bottom of the screen shows pagination controls with the number 1 in the center.

Select a Filer

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

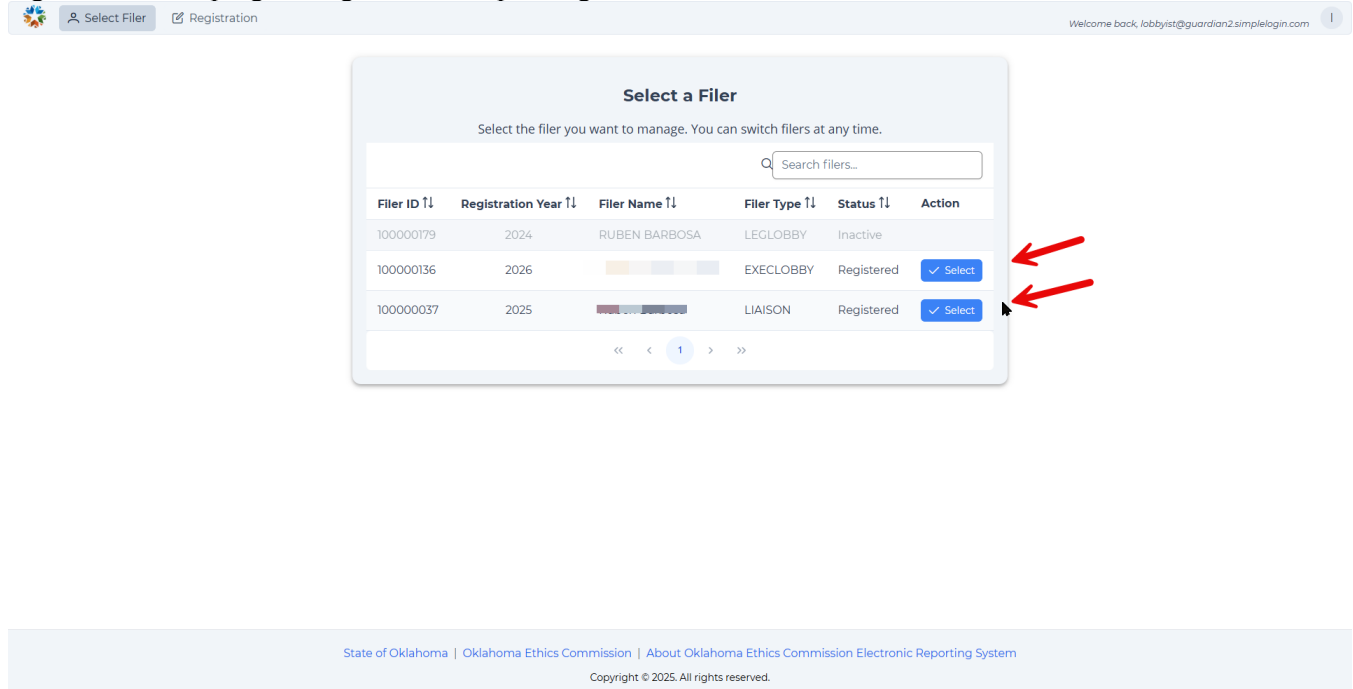
Filer ID	Filer Name	Filer Type	Status	Action
100000047		CANDIDATE	Pending Approval	Select

<< < 1 > >>

VI. Filing Contributions and Expenditures

Figure 32 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 a web application interface for selecting a filer. At the top, there is a navigation bar with a logo, a 'Select Filer' button, and a 'Registration' link. A welcome message 'Welcome back, lobbyist@guardian2.simplelogin.com' is displayed on the right. The main content area is titled 'Select a Filer' and includes a sub-header: 'Select the filer you want to manage. You can switch filers at any time.' Below this is a search bar labeled 'Search filers...'. A table lists the available filers:

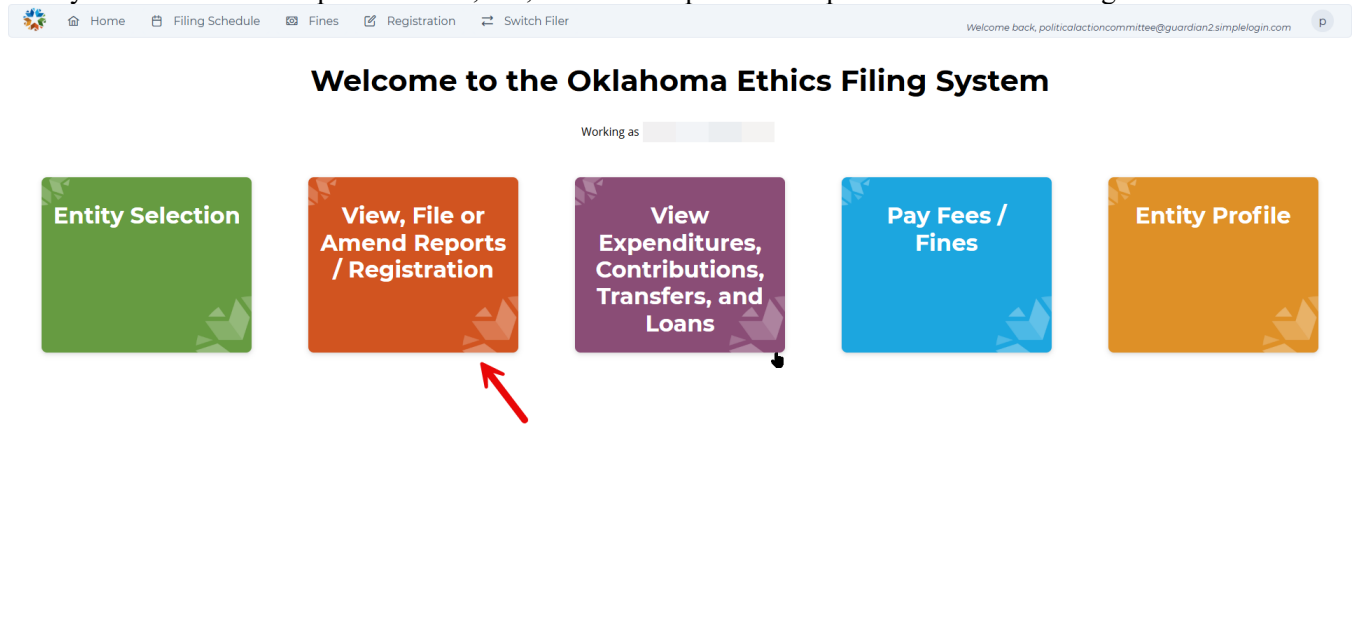
Filer ID ↑↓	Registration Year ↑↓	Filer Name ↑↓	Filer Type ↑↓	Status ↑↓	Action
100000179	2024	RUBEN BARBOSA	LEGLOBBY	Inactive	
100000136	2026		EXECLOBBY	Registered	✓ Select
100000037	2025		LIAISON	Registered	✓ Select

At the bottom of the table, there are pagination controls: '<<' '<' '1' '>' '>>'. Two red arrows point to the 'Select' buttons for the 'EXECLOBBY' and 'LIAISON' filers.

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Figure 33 Filing Reports Option

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



The screenshot shows the 'Welcome to the Oklahoma Ethics Filing System' dashboard. At the top, there is a navigation bar with a logo, a 'Home' link, and links for 'Filing Schedule', 'Fines', 'Registration', and 'Switch Filer'. A welcome message 'Welcome back, politicalactioncommittee@guardian2.simplelogin.com' is displayed on the right. The main content area is titled 'Welcome to the Oklahoma Ethics Filing System' and includes a 'Working as' dropdown menu. Below this are five large, colorful buttons representing different actions:

- Entity Selection (Green)
- View, File or Amend Reports / Registration (Orange) - A red arrow points to this button.
- View Expenditures, Contributions, Transfers, and Loans (Purple)
- Pay Fees / Fines (Blue)
- Entity Profile (Yellow)

Figure 34 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. Users may also view or amend their Registration.

The screenshot shows the 'Filing Schedule' section of the Guardian 2.0 interface. It includes a search bar, a dropdown for 'Select Year to Display', and a table with columns: Report Type, Due Date, Period Covered, Status, Filed Date, Filed Timeliness, and Action. A red arrow points to the 'Start Work' button in the Action column for the 'First Quarterly Contrib/Expend Report'. Below the table is a pagination control showing page 1 of 10. The 'Filed Reports' section below shows a table with columns: Report Type, Due Date, Period Covered, Status, Filed Date, and Action. A red arrow points to the 'Amend' and 'View PDF' buttons in the Action column for the '2025 PAC Registration'.

Report Type	Due Date	Period Covered	Status	Filed Date	Filed Timeliness	Action
First Quarterly Contrib/Expend Report	04/30/2025	01/01/2025 - 03/31/2025	Past Due		Not Yet Filed	Start Work

Report Type	Due Date	Period Covered	Status	Filed Date	Action
2025 PAC Registration			Filed	08/11/2025	Amend View PDF

Figure 35 Begin Work Filing Activities

Users should select “Yes” to report activity from the distinct types of contributions and expenditures. Select “Next.”

The screenshot shows the 'Begin Work Filing Activities' form. It includes a sidebar with links: Cover Page, View PDF, Run Audit, and Submit Report. The main form has a header section with fields: Filer Information, Report Name, Period Covered, and Report Due Date. Below this are two questions with radio button options. A red arrow points to the 'Yes' option for the first question, and another red arrow points to the 'Next' button.

Filer Information	Report Name	Period Covered	Report Due Date
	First Quarterly Contrib/Expend Report	01/01/2025 - 03/31/2025	04/30/2025

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

Do you wish to Dissolve this committee? ☒ No ☐ Yes

[Next](#)

Figure 36 Complete the Activity

Users can now select the type of activity from the left menu as well as see the Summary for items previously submitted. Fill in each of the fields based upon the type of activity selected and “Save” the record.

Contributions Summary

Date	Contributor	Amount	Type
No contributions found Contributions will appear here once added			

Transfer-In Summary

Date	Contributor	Amount	Type
No transfer-ins found Transfer-ins will appear here once added			

Expenditures Summary

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

Figure 37 Enter Cost Paid by Affiliated Entity

Fill in each of the fields based upon the type of activity selected and “Save” the record. Records will be listed at the top of this screen.

Saved Costs Paid by Affiliated Entity

Table Search...

No Affiliated Entity Expenditures found.

Costs Paid by Affiliated Entity

Affiliated Entity *

Cost Type *

Date *

Amount *

Recipient Type *

Cancel Save

Figure 383, 44, 45 Contributions

Select each appropriate option and fill in each of the fields based upon the type of activity selected and “Save” the record. Records will be listed at the top of this screen.

The screenshot displays the Guardian 2.0 System Onboarding Guide interface. On the left, a navigation menu lists various sections: Cover Page, Summary, Costs Paid by Affiliated Entity, Contributions (circled in red), Transfer In, and Expenditures. Under the 'Contributions' section, 'Monetary Contributions' is highlighted. Below the menu, three forms are shown: 'Monetary Contribution', 'In-Kind Contribution', and 'Other Funds'. Each form includes fields for Contribution Date, Contribution Amount, EDI Number (EDI Users Only), and Contributor Type. A checkbox labeled 'Itemize this contribution' is present in each form. The 'Other Funds' form also includes a 'Description of Other Funds Accepted' field. At the bottom of each form are 'Cancel' and 'Save' buttons.

Contributions Menu:

- Cover Page
- Summary
- Costs Paid by Affiliated Entity
- Contributions** (circled in red)
 - Monetary Contributions** (highlighted)
 - In-Kind Contributions
 - Other Funds
- Transfer In
- Expenditures
 - Committee Contribution
 - Electioneering Communication
 - In-Kind Expenditure
 - Independent Expenditure

Monetary Contribution Form:

- * Required
- Contribution Date *
- Contribution Amount *
- ☐ Itemize this contribution
- EDI Number (EDI Users Only)
- Contributor Type *
- Buttons: Cancel, Save

In-Kind Contribution Form:

- * Required
- Contribution Date *
- Contribution Amount *
- ☐ Itemize this contribution
- EDI Number (EDI Users Only)
- Contributor Type *
- Buttons: Cancel, Save

Other Funds Form:

- * Required
- Contribution Date *
- Contribution Amount *
- ☐ Itemize this contribution
- EDI Number (EDI Users Only)
- Description of Other Funds Accepted
- Type of Other Funds *
- Contributor Type *
- Buttons: Cancel, Save

Figure 46 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 picker field.
- 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:

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

Figure 47 Expenditure Activity

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

Committee Contribution

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 *

Cancel Save

Navigation Menu:

- Cover Page
- Summary
- Costs Paid by Affiliated Entity
- Contributions ^
 - Monetary Contributions
 - In-Kind Contributions
 - Other Funds
- Transfer In
- Expenditures ^
 - Committee Contribution**
 - Electioneering Communication
 - In-Kind Expenditure
 - Independent Expenditure
 - Operating Expense
 - State Question Communication
 - Surplus Funds
- Transfer Out
- Loans
- View PDF
- Run Audit
- Submit Report

Figures 48, 29, 50, & 51 Expenditure Activity

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

Ectoneering Communication

*** Required**

Expenditure Date *

Expenditure Amount *

☐ Itemize this expense

Description of Goods or Services *

EDI Number (EDI Users Only)

Recipient Information

Recipient Type *

Associated Candidate

It is required that you provide the name and office of the candidate(s) impacted. Select from the list of candidates below. If a candidate you need is not in the list, enter name and office in the space provided. You must also indicate the stance.

Candidate

Candidate First Name *

Candidate Last Name *

Office *

District

Stance*

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 *

Cancel

Save

Operating Expense

*** Required**

Expenditure Date *

Expenditure Amount *

☐ Itemize this expense

Description of Goods or Services *

EDI Number (EDI Users Only)

Recipient Information

Recipient Type *

Cancel

Save

Independent Expenditure

*** Required**

Expenditure Date *

Expenditure Amount *

☐ Itemize this expense

Description of Goods or Services *

EDI Number (EDI Users Only)

Recipient Information

Recipient Type *

Associated Candidate

It is required that you provide the name and office of the candidate(s) impacted. Select from the list of candidates below. If a candidate you need is not in the list, enter name and office in the space provided. You must also indicate the stance.

Candidate

Candidate First Name *

Candidate Last Name *

Office *

District

Stance*

Cancel

Save

Figures 52 & 53 Expenditure Activity

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

State Question Communication

*** Required**

Expenditure Date *

Expenditure Amount *

☐ Itemize this expense

Description of Goods or Services *

EDI Number (EDI Users Only)

Recipient Information

Recipient Type *

State Question Information

Verify the information in the grid below shows the correct state question number and stance. For incorrect or incomplete data you will need to add, edit, or delete the information to display the correct information.

State Question Number *

Stance

Cancel

Save

Surplus Funds

*** Required**

Expenditure Date *

Expenditure Amount *

☐ Itemize this expense

Description of Goods or Services *

EDI Number (EDI Users Only)

Transfer From Committee

Select a committee

Committee Number

Address

Country *

United States

Address Line 1 *

Address Line 2

City *

State *

Oklahoma

Postal Code *

Cancel

Save

Figure 54 Transfer Out

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

The screenshot displays the 'Transfer Out' form in the Guardian 2.0 system. On the left, a navigation sidebar lists various menu items, with 'Transfer Out' highlighted and circled in red. The main content area shows the 'Transfer Out' form with the following fields:

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

At the bottom of the form, there are two buttons: 'Cancel' and 'Save' (with a dropdown arrow).

Figures 55 & 56 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>	
<div><< < 1 > >></div>							

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 57, 58, & 59 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.

Table Search...

Date of Payment ↑↓

Date Payment Entered ↑↓

Principal Payment ↑↓

Action

10/01/2025

10/01/2025

\$750.00

Edit Payment

Delete Payment

<< < 1 > >>

Add New Payment

Figures 60, 61, & 62 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

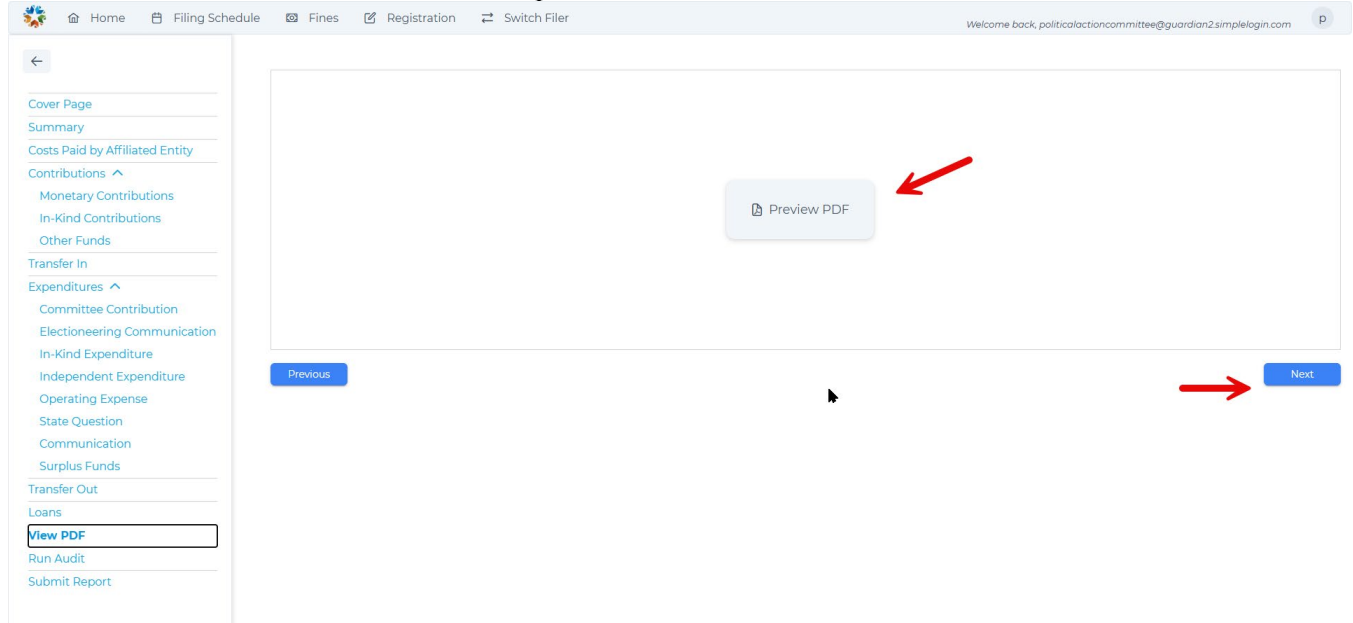
<< < 1 > >>

[Add New Forgiveness](#)

View PDF Report

Figure 63 View PDF Screen

Users can access and the “Preview PDF” Report.”



Submitting Expenditure Reports

Figure 39 Submit Report to Preview or Submit and Esign

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

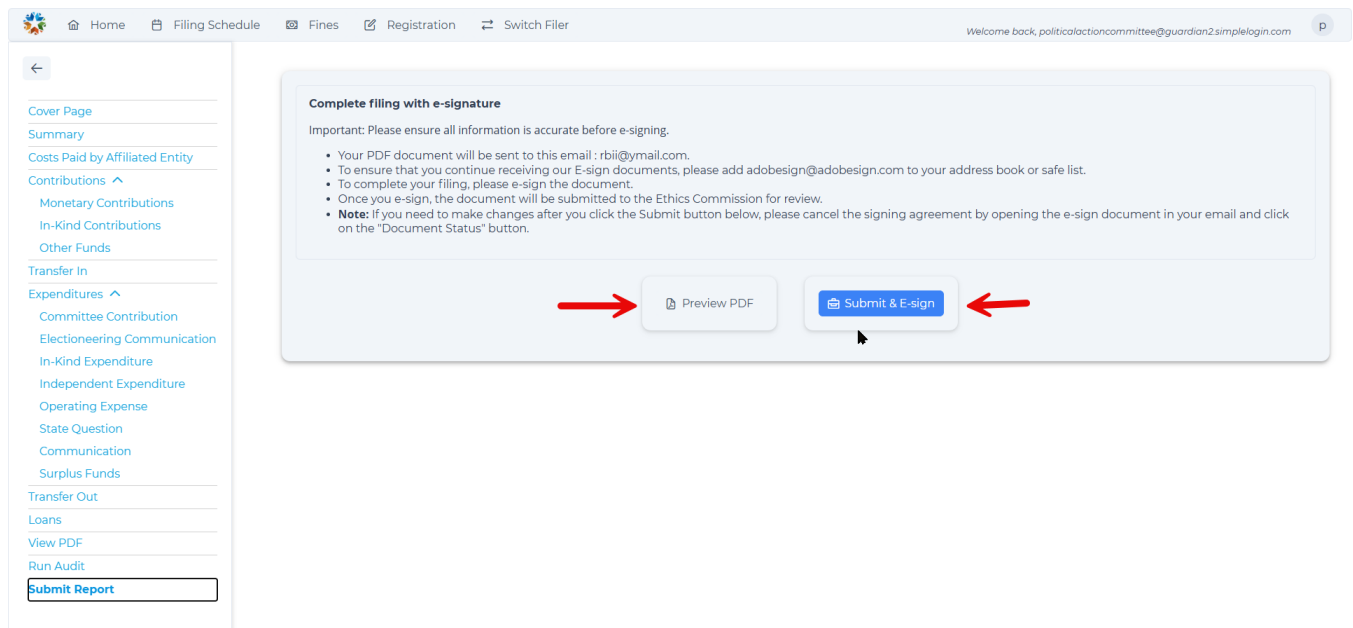


Figure 40 Complete Esign of PDF

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.

Complete filing with e-signature

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

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

Esign

Current Document status : **Out For Signature**

E-sign Instructions

Please check your email: [redacted] **OR** Click the button below to complete e-sign.

Complete Esign **Document Status**

Figure 41 & 67 View and Esign PDF

OKLAHOMA ETHICS COMMISSION
PHONE: (405) 221-3401 • FAX: (405) 221-4995 • WEBSITE: WWW.OK.GOV/ETHICS

LOBBYIST OR LIAISON EXPENDITURE REPORT

AMENDED: NO

Full Legal Name (Last, First, Middle): [redacted] Ethics Number: 16 [redacted]

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

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

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

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

Lobbyist or Liaison Expenditures Summary:

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

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

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

1 required field remaining

Figure 67 View and Esign PDF

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 42 PDF Options to Decline and Other Options

Powered by **Adobe Acrobat Sign**

[DEMO USE ONLY]

Options | Q | ? |

FROM SAMBA NAGABHYRU

Decline to sign

Delegate signing to another

Download PDF

View document history

Report abuse

OKLAHOMA ETHICS COMMISSION

PHONE: (405) 522-3451 • FAX: (405) 522-4905 • WEBSITE: WWW.OK.GOV/ETHICS

LOBBYIST OR LIAISON EXPENDITURE REPORT

AMENDED: NO

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

Lobbyist or Liaison: _____

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.

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

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

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

1 required field remaining

Figure 69 Option to Download copy of Signed PDF

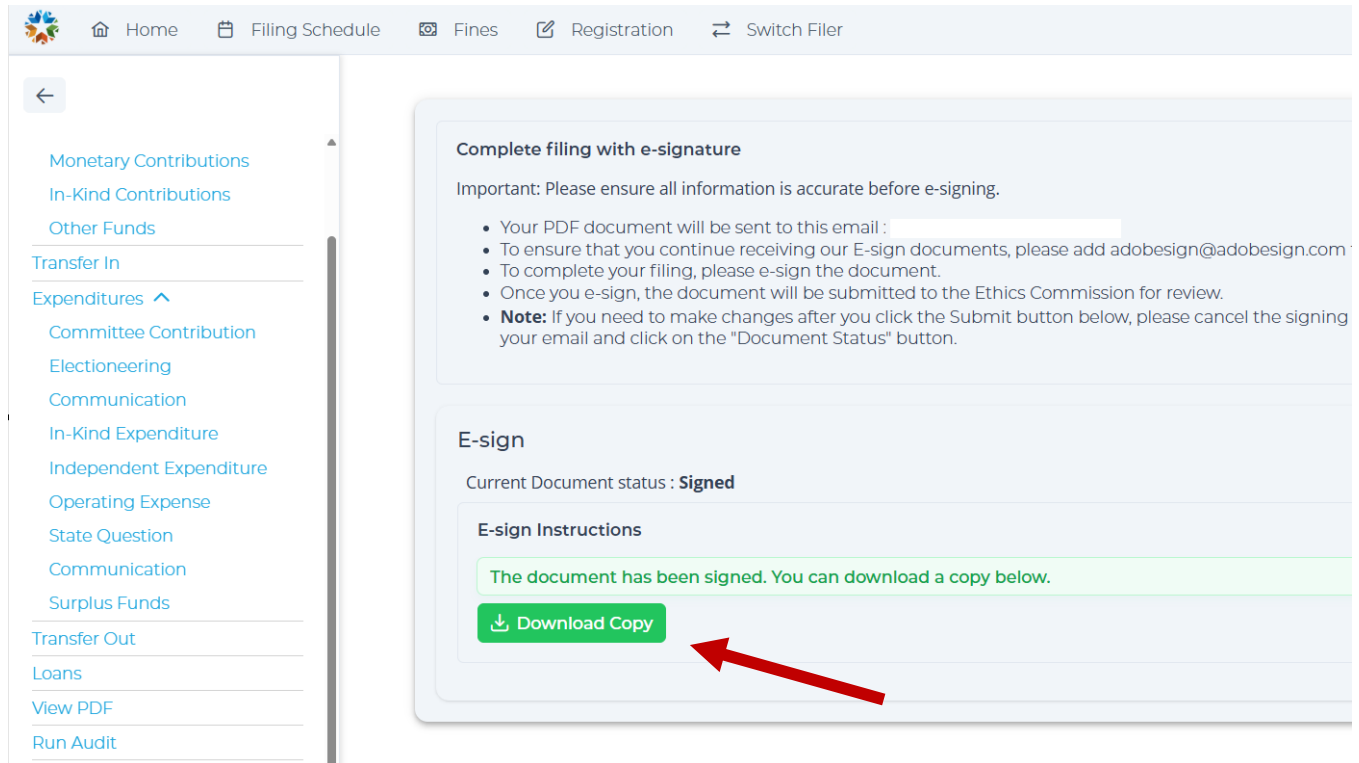


Figure 430 View or Amend Filed Report Option

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.

