



Submitting an Equity Report Amendment

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

1. Submit an equity report amendment electronically to the Division of Lobbying Disclosure Registration and Reporting (LDR) at the Pennsylvania Department of State.

Submitting an Equity Report Amendment

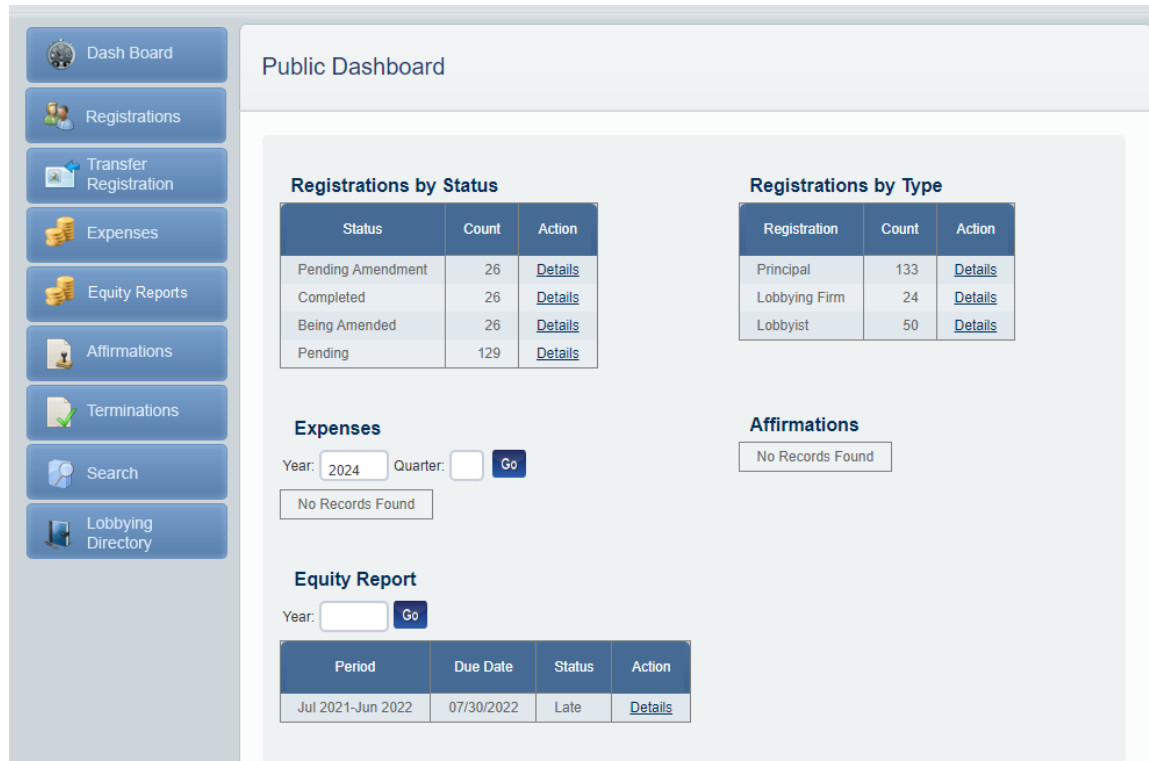
Steps	Actions
<p>1.</p>	<p>Access the LDR Website: Enter www.palobbyingservices.pa.gov in your internet browser's address line.</p>

Steps	Actions																																			
2.	<p>Log In: Enter your Keystone Login account credentials and click [Login].</p> <div data-bbox="683 527 1040 804" data-label="Image"> </div> <p>The user is presented with the Public Dashboard which displays the users Number of Registrations by Status, Number of Registrations by Type, any Equity reports which are late or due as well as the status of any Affirmations.</p> <div data-bbox="386 940 1344 1696" data-label="Image"> <p>Registrations by Status</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Pending Amendment</td> <td>26</td> <td>Details</td> </tr> <tr> <td>Completed</td> <td>25</td> <td>Details</td> </tr> <tr> <td>Being Amended</td> <td>26</td> <td>Details</td> </tr> <tr> <td>Pending</td> <td>129</td> <td>Details</td> </tr> </tbody> </table> <p>Registrations by Type</p> <table border="1"> <thead> <tr> <th>Registration</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Principal</td> <td>133</td> <td>Details</td> </tr> <tr> <td>Lobbying Firm</td> <td>24</td> <td>Details</td> </tr> <tr> <td>Lobbyist</td> <td>49</td> <td>Details</td> </tr> </tbody> </table> <p>Expenses Year: 2024 Quarter: <input type="text"/> <input type="button" value="Go"/> No Records Found</p> <p>Affirmations No Records Found</p> <p>Equity Report Year: <input type="text"/> <input type="button" value="Go"/></p> <table border="1"> <thead> <tr> <th>Period</th> <th>Due Date</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Jul 2021-Jun 2022</td> <td>07/30/2022</td> <td>Late</td> <td>Details</td> </tr> </tbody> </table> </div>	Status	Count	Action	Pending Amendment	26	Details	Completed	25	Details	Being Amended	26	Details	Pending	129	Details	Registration	Count	Action	Principal	133	Details	Lobbying Firm	24	Details	Lobbyist	49	Details	Period	Due Date	Status	Action	Jul 2021-Jun 2022	07/30/2022	Late	Details
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Steps	Actions
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3. Access the My Equity page:

To access the **Equity** page, select **[My Equity]** from the *Equity* sub-menu or by clicking the Details link in the **Equity** grid.



The screenshot shows a 'Public Dashboard' with a left-hand navigation menu and several data sections:

- Registrations by Status:**

Status	Count	Action
Pending Amendment	26	Details
Completed	26	Details
Being Amended	26	Details
Pending	129	Details
- Registrations by Type:**

Registration	Count	Action
Principal	133	Details
Lobbying Firm	24	Details
Lobbyist	50	Details
- Expenses:**

Year: Quarter:

No Records Found
- Affirmations:**

No Records Found
- Equity Report:**

Year:

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

The **Equity Reports to be Submitted** page is displayed:



Registration Requirements

Help

Welcome kevin white

Logout

Dash Board

Registrations

Transfer Registration

Expenses

Equity Reports

Affirmations

Terminations

Search

Lobbying Directory

Equity Reports

2023 Equity Reports to be Submitted

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

Equity Reports Must Disclose:

Reporting Periods

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

What is Equity?

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

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

Equity Reports to be Completed

Completed Equity Reports

Registration Period 2020-2024

Page 1 of 2

Go

Next

[View All](#)

Action Filter	Registration Name	Status	Registration No.	Registration Type	Equity Report Period	Last Update
Clear		All		All	All	
Create View Delete	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
Create View Delete	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
Create View Delete	Commonwealth Strategic Solutions, LLC	Pending	F00109	Lobbying Firm	Jul 2022-Jun 2023	02/05/2024
Create	Dunkin	Late	F48713	Lobbying Firm	Jul 2022-Jun 2023	
Create View Delete		Pending Amendment	L48737	Lobbyist	Jul 2022-Jun 2023	02/06/2024
Create	Developer 02-23, Developer 01-23	Late	L48707	Lobbyist	Jul 2022-Jun 2023	
Create View		Pending Amendment	L20410	Lobbyist	Jul 2022-Jun	02/09/2024



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<p>4. Access the Completed Equity Reports Page: Click the [Completed Equity Reports] button.</p>	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 10px;"> <p>Each lobbyist and lobbying firm registered with the Pennsylvania Department of State is required by Act 70 of 2021 to complete an Equity Report by July 30th each year.</p> <p>Equity Reports Must Disclose:</p> <p>Reporting Periods</p> <p>The 2023 reporting period runs from July 1, 2023 , through June 30, 2024 .</p> <p>What is Equity?</p> <p>Equity means any interest or ownership. 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If you do make any additional changes to the Equity Report , please reaffirm and resubmit the Equity Report.</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> <div> Equity Reports to be Completed Completed Equity Reports </div> <div> Registration Period 2020-2024 </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> <div> Page 1 of 2 Go </div> <div> Next </div> <div> View All </div> </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr style="background-color: #0056b3; color: white;"> <th style="width: 5%;">Action Filter</th> <th style="width: 20%;">Registration Name</th> <th style="width: 10%;">Status</th> <th style="width: 10%;">Registration No.</th> <th style="width: 10%;">Registration Type</th> <th style="width: 15%;">EquityReport Period</th> <th style="width: 10%;">Last Update</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Clear</td> <td><input style="width: 95%;" type="text"/></td> <td style="text-align: center;">All</td> <td><input style="width: 95%;" type="text"/></td> <td style="text-align: center;">All</td> <td style="text-align: center;">All</td> <td></td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Courtney Testing Firm</td> <td style="text-align: center;">Completed</td> <td>F42435</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Dunkin</td> <td style="text-align: center;">Completed</td> <td>F48713</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/12/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>test123</td> <td style="text-align: center;">Completed</td> <td>F48703</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View</td> <td></td> <td style="text-align: center;">Being Amended</td> <td>L48737</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/06/2024</td> </tr> <tr> <td style="text-align: center;">View</td> <td>147914, nagini</td> <td style="text-align: center;">Being Amended</td> <td>L45606</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View</td> <td>Long, Amy R</td> <td style="text-align: center;">Being Amended</td> <td>L28148</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Long, Michael S</td> <td style="text-align: center;">Completed</td> <td>L00119</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Nyquist, Noel</td> <td style="text-align: center;">Completed</td> <td>L13210</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Nyquist, Todd R</td> <td style="text-align: center;">Completed</td> <td>L20741</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td style="text-align: center;">View Amend</td> <td>Penndot, Jeff</td> <td style="text-align: center;">Completed</td> <td>L48743</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> </tbody> </table> </div>	Action Filter	Registration Name	Status	Registration No.	Registration Type	EquityReport Period	Last Update	Clear	<input style="width: 95%;" type="text"/>	All	<input style="width: 95%;" type="text"/>	All	All		View Amend	Courtney Testing Firm	Completed	F42435	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024	View Amend	Dunkin	Completed	F48713	Lobbying Firm	Jul 2022-Jun 2023	02/12/2024	View Amend	test123	Completed	F48703	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024	View		Being Amended	L48737	Lobbyist	Jul 2022-Jun 2023	02/06/2024	View	147914, nagini	Being Amended	L45606	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View	Long, Amy R	Being Amended	L28148	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Long, Michael S	Completed	L00119	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Nyquist, Noel	Completed	L13210	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Nyquist, Todd R	Completed	L20741	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Penndot, Jeff	Completed	L48743	Lobbyist	Jul 2022-Jun 2023	02/09/2024
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Based on the registration period selected from the 'Registration Period' drop-down, the grid on the **Completed Equity Reports** page will display all submitted equity reports for that registration period.



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Registration Period:

Page of 2 [View All](#)

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View Amend	Penndot, Jeff	Completed	L48743	Lobbyist	Jul 2022-Jun 2023	02/09/2024

Note: If a previously submitted equity report is currently being amended, the status of the submitted report is 'Being Amended'.



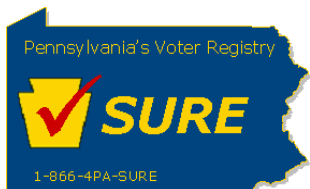
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5. Select the Equity Report to be Amended: Click the <u>Amend</u> link for the desired equity report.	<div data-bbox="349 535 1485 871" style="background-color: #0056b3; color: white; padding: 10px;"> <p>Each lobbyist and lobbying firm registered with the Pennsylvania Department of State is required by Act 70 of 2021 to complete an Equity Report by July 30th each year.</p> <p>Equity Reports Must Disclose:</p> <p>Reporting Periods</p> <p>The 2023 reporting period runs from July 1, 2023 , through June 30, 2024 .</p> <p>What is Equity?</p> <p>Equity means any interest or ownership. The term "interest or ownership" includes, but is not limited to: any interest in any shares (however designated, whether voting or nonvoting); membership interests (however designated, whether voting or nonvoting); partnership interests (whether general or limited); and, any other interest that confers the right to receive a share of the profits and losses of, or distributions of property of, any partnership or business.</p> </div> <p data-bbox="349 892 1485 934">Note: You can continue to make changes to the Equity Report report until the reporting period closes. If you do make any additional changes to the Equity Report , please reaffirm and resubmit the Equity Report.</p> <div data-bbox="349 945 1485 1039" style="border: 1px solid #0056b3; padding: 5px;"> Equity Reports to be Completed Completed Equity Reports Registration Period 2020-2024 ▼ </div> <div data-bbox="349 1008 1485 1060" style="text-align: center;"> Page 1 ▼ of 2 Go Next View All </div> <table border="1" data-bbox="349 1071 1485 1795"> <thead> <tr> <th>Action Filter</th> <th>Registration Name</th> <th>Status</th> <th>Registration No.</th> <th>Registration Type</th> <th>EquityReport Period</th> <th>Last Update</th> </tr> </thead> <tbody> <tr> <td>Clear</td> <td><input type="text"/></td> <td>All ▼</td> <td><input type="text"/></td> <td>All ▼</td> <td>All ▼</td> <td></td> </tr> <tr> <td>View Amend</td> <td>Courtney Testing Firm</td> <td>Completed</td> <td>F42435</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View Amend</td> <td>Dunkin</td> <td>Completed</td> <td>F48713</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/12/2024</td> </tr> <tr> <td>View Amend</td> <td>test123</td> <td>Completed</td> <td>F48703</td> <td>Lobbying Firm</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View</td> <td></td> <td>Being Amended</td> <td>L48737</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/06/2024</td> </tr> <tr> <td>View</td> <td>147914, nagini</td> <td>Being Amended</td> <td>L45606</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View</td> <td>Long, Amy R</td> <td>Being Amended</td> <td>L28148</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View Amend</td> <td>Long, Michael S</td> <td>Completed</td> <td>L00119</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View Amend</td> <td>Nyquist, Noel</td> <td>Completed</td> <td>L13210</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View Amend</td> <td>Nyquist, Todd R</td> <td>Completed</td> <td>L20741</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> <tr> <td>View Amend</td> <td>Penndot, Jeff</td> <td>Completed</td> <td>L48743</td> <td>Lobbyist</td> <td>Jul 2022-Jun 2023</td> <td>02/09/2024</td> </tr> </tbody> </table>	Action Filter	Registration Name	Status	Registration No.	Registration Type	EquityReport Period	Last Update	Clear	<input type="text"/>	All ▼	<input type="text"/>	All ▼	All ▼		View Amend	Courtney Testing Firm	Completed	F42435	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024	View Amend	Dunkin	Completed	F48713	Lobbying Firm	Jul 2022-Jun 2023	02/12/2024	View Amend	test123	Completed	F48703	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024	View		Being Amended	L48737	Lobbyist	Jul 2022-Jun 2023	02/06/2024	View	147914, nagini	Being Amended	L45606	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View	Long, Amy R	Being Amended	L28148	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Long, Michael S	Completed	L00119	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Nyquist, Noel	Completed	L13210	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Nyquist, Todd R	Completed	L20741	Lobbyist	Jul 2022-Jun 2023	02/09/2024	View Amend	Penndot, Jeff	Completed	L48743	Lobbyist	Jul 2022-Jun 2023	02/09/2024
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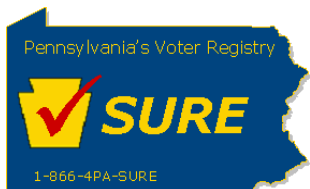
6.	<p>Amend the Submitted Equity Report:</p> <p>Navigate through the equity report to the page which needs to be edited. Make the desired changes and then navigate to the final page.</p>
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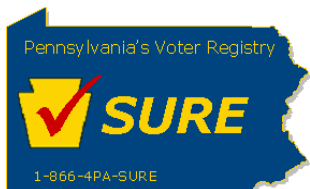
Steps	Actions																
7.	<p>Check the “Affirmation” checkbox. The user has the ability to submit the “Do you have a statement as to inability or refusal of lobbyist/lobbying firm to sign report” checkbox. If you do not wish to sign the refusal report, proceed directly to Step 11.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Affirmation</p> <p>By checking the box below, I acknowledge that I have a continuing duty to disclose any equity throughout a reporting period.*</p> <p><input type="checkbox"/> Affirm</p> <p>By typing my name below, I affirm that I have the knowledge necessary to complete the Equity Report and the foregoing information is true and correct to the best of my knowledge, information, and belief; said affirmation being made subject to the penalties prescribed by 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).*</p> <p><i>Type your name below.</i></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 30%;">First Name : *</td> <td style="width: 20%;"><input type="text" value="test"/></td> <td style="width: 15%;">Middle Initial :</td> <td style="width: 35%;"><input type="text"/></td> </tr> <tr> <td>Last Name : *</td> <td><input type="text" value="z"/></td> <td>Suffix:</td> <td><input type="text"/></td> </tr> <tr> <td>Title :</td> <td><input type="text"/></td> <td>Date Signed :</td> <td><input type="text"/></td> </tr> <tr> <td>What is your relationship to the lobbying firm (if applicable)?</td> <td colspan="3"><input type="text" value="Enter you answer"/></td> </tr> </table> </div> <p style="text-align: center; margin-top: 10px;"> Previous Save Cancel Submit </p>	First Name : *	<input type="text" value="test"/>	Middle Initial :	<input type="text"/>	Last Name : *	<input type="text" value="z"/>	Suffix:	<input type="text"/>	Title :	<input type="text"/>	Date Signed :	<input type="text"/>	What is your relationship to the lobbying firm (if applicable)?	<input type="text" value="Enter you answer"/>		
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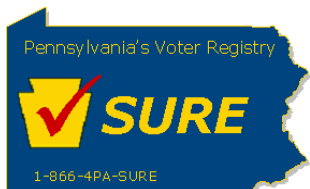
**Department of State
Statewide Uniform Registry of Electors (SURE)
Submitting an Equity Report Amendment
January 17, 2020**



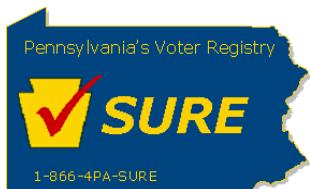
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