

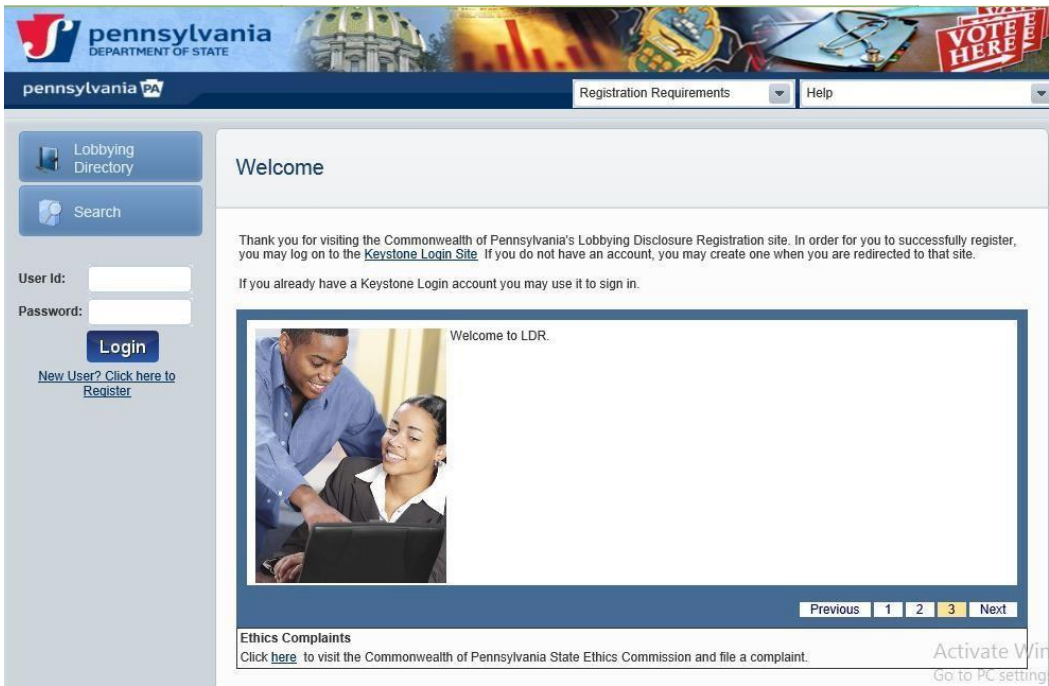


## Creating a New Equity Report

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

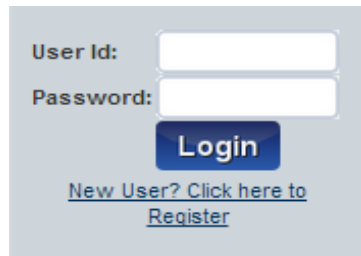
1. Electronically submit an equity report to the Division of Lobbying Disclosure Registration and Reporting at the Pennsylvania Department of State

### Submitting an Equity Report

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

Steps	Actions
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2. Log In:  
 Enter your Keystone Login account credentials and click **[Login]**.



The user is presented with the Public Dashboard which displays the user's 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.

**Registrations by Status**

Status	Count	Action
Pending Amendment	26	<a href="#">Details</a>
Completed	25	<a href="#">Details</a>
Being Amended	26	<a href="#">Details</a>
Pending	129	<a href="#">Details</a>

**Registrations by Type**

Registration	Count	Action
Principal	133	<a href="#">Details</a>
Lobbying Firm	24	<a href="#">Details</a>
Lobbyist	49	<a href="#">Details</a>

**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	<a href="#">Details</a>

Steps	Actions																																			
<p>3.</p>	<p>Access the <i>My Equity</i> page:</p> <p>To access the <b>Equity</b> page, select [<b>My Equity</b>] from the <i>Equity</i> sub-menu or by clicking the <u>Details</u> link in the <b>Equity</b> grid.</p> <div data-bbox="344 562 1425 1283" style="border: 1px solid #ccc; padding: 10px;">  <p><b>Public Dashboard</b></p> <p><b>Registrations by Status</b></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><a href="#">Details</a></td> </tr> <tr> <td>Completed</td> <td>26</td> <td><a href="#">Details</a></td> </tr> <tr> <td>Being Amended</td> <td>26</td> <td><a href="#">Details</a></td> </tr> <tr> <td>Pending</td> <td>129</td> <td><a href="#">Details</a></td> </tr> </tbody> </table> <p><b>Registrations by Type</b></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><a href="#">Details</a></td> </tr> <tr> <td>Lobbying Firm</td> <td>24</td> <td><a href="#">Details</a></td> </tr> <tr> <td>Lobbyist</td> <td>50</td> <td><a href="#">Details</a></td> </tr> </tbody> </table> <p><b>Expenses</b></p> <p>Year: <input type="text" value="2024"/> Quarter: <input type="text"/> <input type="button" value="Go"/></p> <p>No Records Found</p> <p><b>Affirmations</b></p> <p>No Records Found</p> <p><b>Equity Report</b></p> <p>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><a href="#">Details</a></td> </tr> </tbody> </table> </div> <p>The <b>Equity Reports to be Submitted</b> page is displayed:</p>	Status	Count	Action	Pending Amendment	26	<a href="#">Details</a>	Completed	26	<a href="#">Details</a>	Being Amended	26	<a href="#">Details</a>	Pending	129	<a href="#">Details</a>	Registration	Count	Action	Principal	133	<a href="#">Details</a>	Lobbying Firm	24	<a href="#">Details</a>	Lobbyist	50	<a href="#">Details</a>	Period	Due Date	Status	Action	Jul 2021-Jun 2022	07/30/2022	Late	<a href="#">Details</a>
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Registration Requirements ▼ | Help ▼ | Welcome kevin w

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## 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 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 share (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, 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	Registration Name	Status	Registration No.	Registration Type	Equity Report Period	
Filter Clear	<input type="text"/>	All <span style="font-size: 0.7em;">▼</span>	<input type="text"/>	All <span style="font-size: 0.7em;">▼</span>	All <span style="font-size: 0.7em;">▼</span>	
Create View Delete	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02
Create View	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun	02



Steps	Actions
	<p>Based on the registration period selected from the 'Registration Period' drop-down, the grid on the <b>Equity Reports to be Submitted</b> page will display all un-submitted equity reports for that registration period. Principal equity reports will show with a status of either 'Due' or 'Late'. Lobbying Firm and Lobbyist equity reports will show with a status of 'Not Due'.</p> <p>If the logged in user is the owner of multiple Principal registrations, even if one of those registrations are late or due, the registration status will appear as 'Late' or 'Due' in the <b>Status</b> column of the <b>Equity</b> grid on the <b>Public User Dashboard</b>.</p>
<p>4.</p>	<p>Select the Equity Report to be Submitted:</p> <p>Click the <u>Create</u> link for the desired equity report.</p> <p>NOTE: If an equity report has been started but not yet submitted, a View and Delete link will be displayed. <u>View</u> will display the view of the data entered so far and <u>Delete</u> will delete the un-submitted equity report.</p>



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Registration Requirements Help
Welcome kevin white Logout

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Equity Reports to be Completed
Completed Equity Reports
Registration Period 2020-2024

Page 1 of 2
Go
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View All

Action	Registration Name	Status	Registration No.	Registration Type	EquityReport Period	Last Update
<a href="#">Filter</a> <a href="#">Clear</a>		All		All	All	
<a href="#">Create</a> <a href="#">View</a> <a href="#">Delete</a>	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
<a href="#">Create</a> <a href="#">View</a> <a href="#">Delete</a>	Axe	Pending	F48709	Lobbying Firm	Jul 2022-Jun 2023	02/09/2024
<a href="#">Create</a> <a href="#">View</a> <a href="#">Delete</a>	Commonwealth Strategic Solutions, LLC	Pending	F00109	Lobbying Firm	Jul 2022-Jun 2023	02/05/2024
<a href="#">Create</a>	Dunkin	Late	F48713	Lobbying Firm	Jul 2022-Jun 2023	
<a href="#">Create</a> <a href="#">View</a> <a href="#">Delete</a>		Pending Amendment	L48737	Lobbyist	Jul 2022-Jun 2023	02/06/2024
<a href="#">Create</a>	Developer 02-23, Developer 01-23	Late	L48707	Lobbyist	Jul 2022-Jun 2023	
<a href="#">Create</a> <a href="#">View</a>		Pending Amendment	L48740	Lobbyist	Jul 2022-Jun 2023	02/09/2024

Steps	Actions
5.	<p>Enter the Filer's Information:</p> <p>Enter the 'First Name' and 'Last Name' of the person submitting the equity report. If desired a Middle Name/Initial and/or Suffix may also be entered. Click [Next].</p> 

6. Review Identification Affiliations:

The following page will display the registrations affiliated to the registration which is submitting the equity report. If submitting an equity report as a Principal, the page will show all Lobbying Firms and Lobbyist which were identified on the registration as being affiliated with the principal during the equity quarter. The filer may not make any edits or additions to the affiliations through this page. They may however view the affiliation's registration by clicking on the [View](#) action link.



**Equity Reports**

[New Registration](#)  
[Registrations](#)  
[My Registrations](#)

Name: Commonwealth Strategic Solutions, LLC  
 Registration No: F00109  
 View Principal's

**Lobbying Firm(s)/Lobbyist(s) Lobbying on Principal's Behalf** Below is a list of all the lobbying firms and lobbyists identified as lobbying on principal's behalf for the registration being processed. If this list does not match the actual list of lobbyists, you will need to amend your registration to reflect the appropriate relationships.

**Identification of Principal(s) Represented**  
 Principal(s) Represented Below is a list of all the principals represented for the registration being processed. If this list does not match the actual list of principals, you will need to amend your registration to reflect the appropriate relationships.

Action	Name	Registration Number
<a href="#">View</a>	Altria Client Services and its Affiliates	P00922
<a href="#">View</a>	Keystone Biofuels Inc	P04879

[Previous](#)
[Save](#)
[Cancel](#)
[Next](#)

If the filer is submitting an equity report as a Lobbying Firm or a Lobbyist, this page will display the Principals which the Lobbying Firm or Lobbyist identified during their registration as being affiliated to them. The user must add the Principals for which they are reporting equities. To do this, the user selects the desired Principal from the drop-down list and click **[Add]**. This will be repeated until all desired Principals have been identified.





After clicking **[Add]** a grid will be displayed containing the identified principals.

### Identification of Principal(s) Represented

Principal(s) Represented Below is a list of all the principals represented for the registration being processed. If this list does not match the actual list of principals, you will need to amend your registration to reflect the appropriate relationships.

P40861 - NG Test

**Add**

### Principal(s) Represented

Action	Name	Registration Number
<a href="#">View</a> <a href="#">Delete</a>	UAT Test	P40849
<a href="#">View</a> <a href="#">Delete</a>	NG Test	P40861

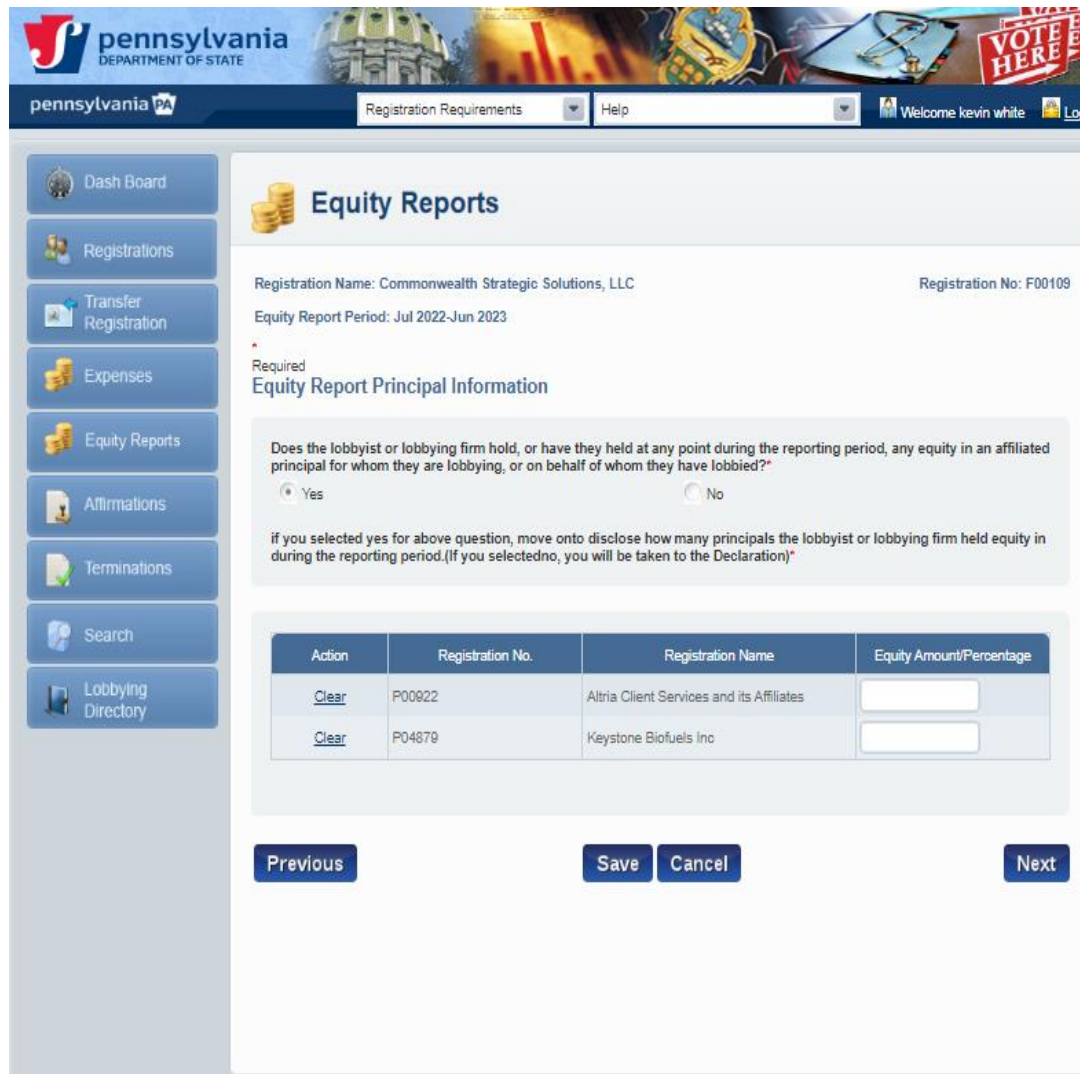
**Previous**

**Next**

Once all affiliations have been reviewed or added, click **[Next]**.

7. Submit the Equity Details:

After identifying all affiliations, the user is directed to a page to enter the equity details. There are one question on the page, each containing a 'Yes' checkbox.



The screenshot shows the 'Equity Reports' page in the SURE system. The page header includes the Pennsylvania Department of State logo and navigation links for 'Registration Requirements' and 'Help'. The user is logged in as 'Welcome kevin white'. The main content area displays the following information:

- Registration Name: Commonwealth Strategic Solutions, LLC
- Registration No: F00109
- Equity Report Period: Jul 2022-Jun 2023

A required question is displayed: "Does the lobbyist or lobbying firm hold, or have they held at any point during the reporting period, any equity in an affiliated principal for whom they are lobbying, or on behalf of whom they have lobbied?" The 'Yes' radio button is selected.

Below the question, a table lists the equity holdings for the selected 'Yes' response:

Action	Registration No.	Registration Name	Equity Amount/Percentage
<a href="#">Clear</a>	P00922	Altria Client Services and its Affiliates	<input type="text"/>
<a href="#">Clear</a>	P04879	Keystone Biofuels Inc	<input type="text"/>

At the bottom of the page, there are navigation buttons: 'Previous', 'Save', 'Cancel', and 'Next'.



Question 1:

Does the lobbyist or lobbying firm hold, or have they held at any point during the reporting period, any equity in an affiliated principal for whom they are lobbying, or on behalf of whom they have lobbied?\*

Yes

No

if you selected yes for above question, move onto disclose how many principals the lobbyist or lobbying firm held equity in during the reporting period.(If you selectedno, you will be taken to the Declaration)\*

The screenshot shows the 'Equity Reports' section of the SURE web application. The user is logged in as 'kevin white'. The page displays a form for 'Equity Report Principal Information' for registration L00119. The form includes a question: 'Does the lobbyist or lobbying firm hold, or have they held at any point during the reporting period, any equity in an affiliated principal for whom they are lobbying, or on behalf of whom they have lobbied?\*' with radio buttons for 'Yes' and 'No'. Below the question is a table with the following data:

Action	Registration No.	Registration Name	Equity Amount/Percentage
<a href="#">Clear</a>	P00922	Altria Client Services and its Affiliates	<input type="text"/>
<a href="#">Clear</a>	P01256	ASSOCIATION OF INDEPENDENT COLLEGES & UNIVERSITIES OF PA	<input type="text"/>
<a href="#">Clear</a>	P36655	Bailey Chestnut Partners, LP	<input type="text"/>
<a href="#">Clear</a>	P03652	Big Brothers/Big Sisters of Southeast Pennsylvania	<input type="text"/>
<a href="#">Clear</a>	P26623	Bridgeway Capital	<input type="text"/>
<a href="#">Clear</a>	P33836	Bucks County Services, Inc.	<input type="text"/>
<a href="#">Clear</a>	P40740	Carwash Association of Pennsylvania	<input type="text"/>
<a href="#">Clear</a>	P14875	Center for Autism and Developmental Disabilities of Philhaven	<input type="text"/>
<a href="#">Clear</a>	P23539	Citizens Public Adjusters, Inc.	<input type="text"/>
<a href="#">Clear</a>	P34307	Coalition for Procurement Reform	<input type="text"/>
<a href="#">Clear</a>	P02319	Comcast Corporation	<input type="text"/>



8.

Check the "Affirmation" checkbox. The user has the ability to sign 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 12.

### Affirmation

By checking the box below, I acknowledge that I have a continuing duty to disclose any equity throughout a reporting period.\*

Affirm

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).\*

Type your name below.

First Name : \*

test

Middle Initial :

Last Name : \*

z

Suffix:

Title :

Date Signed

02/12/2024

What is your relationship to the lobbying firm (if applicable)?

Enter you answer

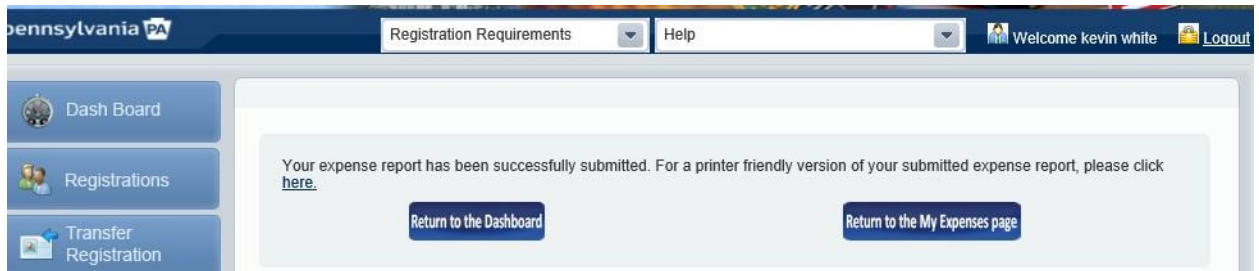
Previous

Save

Cancel

Submit

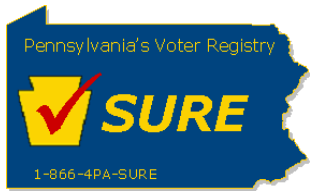
12. Click "Submit". The equity report is submitted successfully. User can print a friendly version of the equity report, return to their dashboard or return to the equitys page.





**Pennsylvania Department of State  
Statewide Uniform Registry of Electors (SURE)  
Creating a New Equity Report  
January 17, 2020**

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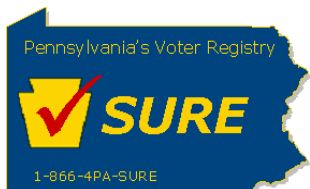
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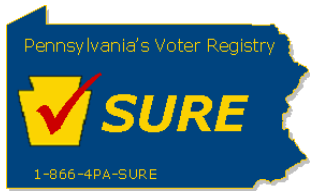




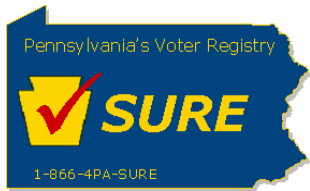
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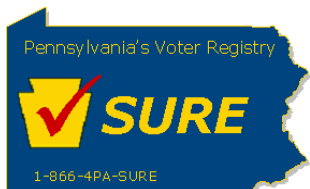
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