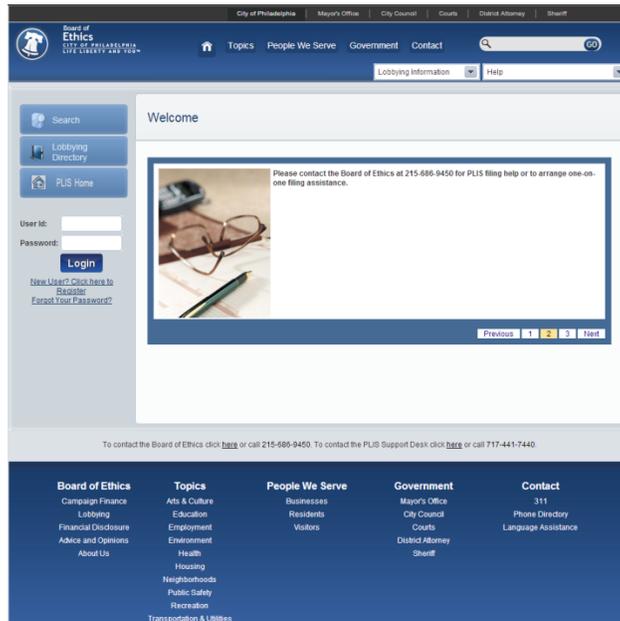


Submitting an Expense Report or Expense Report Amendment

This guide outlines the steps to electronically submit a new expense report or to amend an already-submitted expense report in the Philadelphia Lobbying Information System (PLIS).

Step 1. Access the PLIS Website:

Enter www.phila.gov/Lobbying in your internet browser's address line.

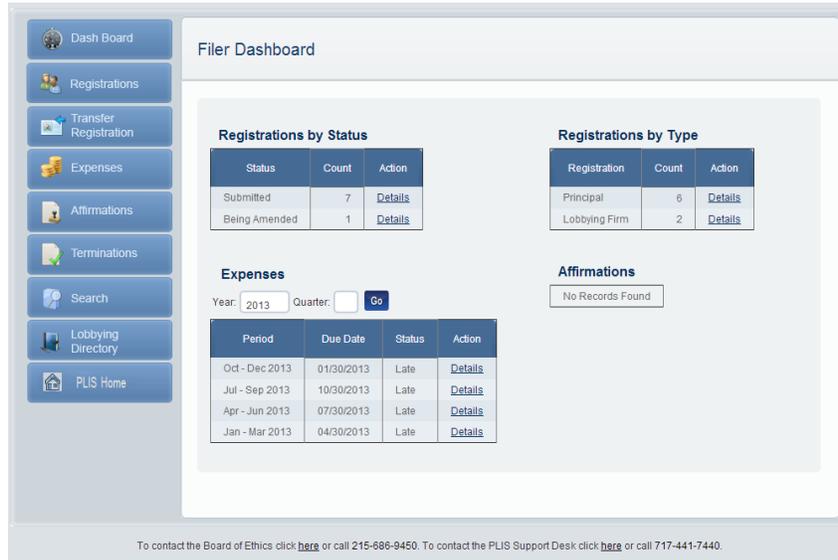


Step 2. Log In

To log into the system, the user must be registered with the PLIS system. Once the user is registered, enter your account credentials and click [Login].



The user is presented with the Filer Dashboard which displays the user’s Registrations by Status, Registrations by Type, Expense Reports for the selected year (defaulted to the current year), and Affirmations Due for the current year.



Filer Dashboard

Registrations by Status

Status	Count	Action
Submitted	7	Details
Being Amended	1	Details

Registrations by Type

Registration	Count	Action
Principal	5	Details
Lobbying Firm	2	Details

Expenses

Year: Quarter:

Period	Due Date	Status	Action
Oct - Dec 2013	01/30/2013	Late	Details
Jul - Sep 2013	10/30/2013	Late	Details
Apr - Jun 2013	07/30/2013	Late	Details
Jan - Mar 2013	04/30/2013	Late	Details

Affirmations

No Records Found

To contact the Board of Ethics click [here](#) or call 215-686-9450. To contact the PLIS Support Desk click [here](#) or call 717-441-7440.

Step 3. Access the My Expenses Page

Access the My Expenses page either by selecting ‘My Expenses’ from the Expenses sub-menu or by clicking Details for the desired Expense Reporting Period on the Filer Dashboard.



Or

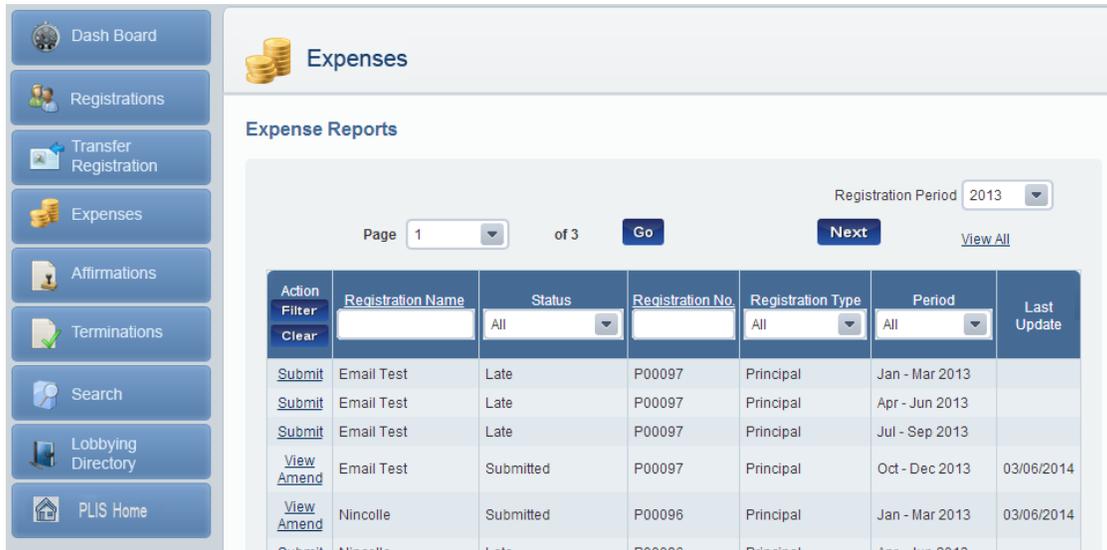


Expenses

Year: Quarter:

Period	Due Date	Status	Action
Oct - Dec 2013	01/30/2013	Late	Details
Jul - Sep 2013	10/30/2013	Late	Details
Apr - Jun 2013	07/30/2013	Late	Details
Jan - Mar 2013	04/30/2013	Late	Details

The My Expenses page is displayed and is defaulted to show the expense reports due or submitted for the current Registration Period. To prepare an Expense Report for a prior quarter or to amend a previously submitted Expense Report, the Registration Period may be changed by selecting a previous Registration Period from the 'Registration Period' drop-down. The user may also view all submitted and due expense reports for all Registration Periods by clicking the [View All](#) link.



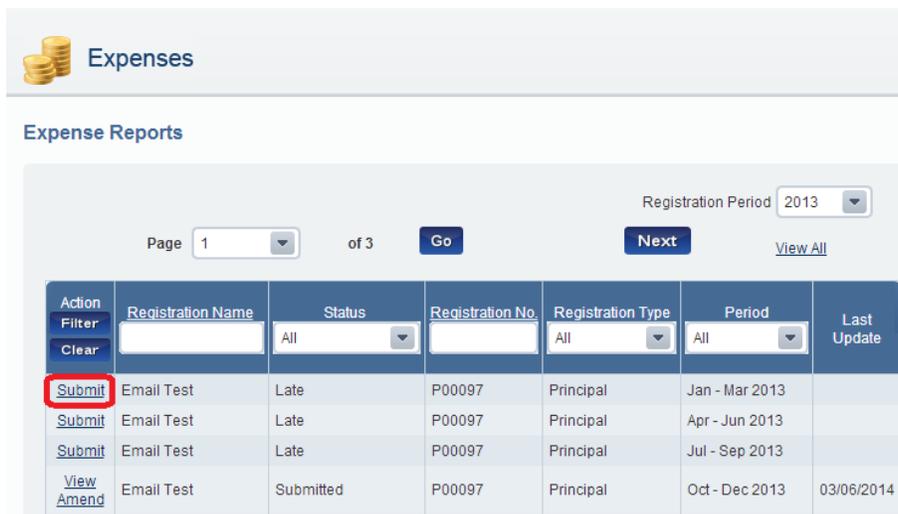
The screenshot shows the 'Expenses' dashboard with a sidebar on the left containing navigation links: Dash Board, Registrations, Transfer Registration, Expenses, Affirmations, Terminations, Search, Lobbying Directory, and PLIS Home. The main content area is titled 'Expenses' and 'Expense Reports'. It features a registration period dropdown set to '2013', a page indicator 'Page 1 of 3', and buttons for 'Go', 'Next', and 'View All'. Below this is a table with the following data:

Action Filter	Registration Name	Status	Registration No.	Registration Type	Period	Last Update
Clear	<input type="text"/>	All	<input type="text"/>	All	All	
Submit	Email Test	Late	P00097	Principal	Jan - Mar 2013	
Submit	Email Test	Late	P00097	Principal	Apr - Jun 2013	
Submit	Email Test	Late	P00097	Principal	Jul - Sep 2013	
View Amend	Email Test	Submitted	P00097	Principal	Oct - Dec 2013	03/06/2014
View Amend	Nincolle	Submitted	P00096	Principal	Jan - Mar 2013	03/06/2014
Submit	Nincolle	Late	P00096	Principal	Apr - Jun 2013	

Step 4. Access the Expense Report to be Submitted

From the My Expenses page, the user may enter information for a new Expense Report by clicking [Submit](#) or may amend an existing Expense Report by clicking [Amend](#). Advance to the 'Submitting an Expense Report Amendment' section of this job aid if you are submitting an expense report amendment.

Clicking **Submit** for any Principal Registration will open the first page of the Expense Report wizard.



This screenshot is identical to the previous one, but the 'Submit' button in the first row of the table is highlighted with a red border to indicate the action to be taken.

NOTE: If you are submitting the expense report as a Lobbying Firm or Lobbyist, clicking Submit will open a new screen containing each Principal with which you were affiliated during that expense quarter. Clicking the Submit link on this grid will open the Expense Report wizard for the selected Lobbying Firm or Lobbyist and its affiliated Principal.

 Expenses

Expense Reports

Page 1 of 1

Action	Registration Name	Status	Registration No.	Principal Name	Principal Registration No.	Period	Last Update
Filter Clear	<input type="text"/>	All	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	
View	PLIS Testing	Being Amended	F00090	Payment Testing -2	P00080	Jan - Mar 2013	02/21/2014
View Submit Delete	PLIS Testing	Pending Amendment	F00090	Payment Testing -2	P00080	Jan - Mar 2013	02/27/2014
Submit	PLIS Testing	Not Due	F00090	test	P00085	Jan - Mar 2013	
View Submit Delete	PLIS Testing	Pending	F00090	Test Payment Redirect	P00086	Jan - Mar 2013	02/24/2014
Submit	PLIS Testing	Not Due	F00090	Test Submit Payment Link	P00084	Jan - Mar 2013	

Step 5. Verify the Filer Information

Your Filer Information will be populated based upon your most current Registration. Verify that the Filer Information is correct for the registration for which the expense report is being submitted and click [Next].

 Expenses

Lobbying Disclosure Quarterly Expense Report

Below is the filer information for the expense report.

Filer's Information

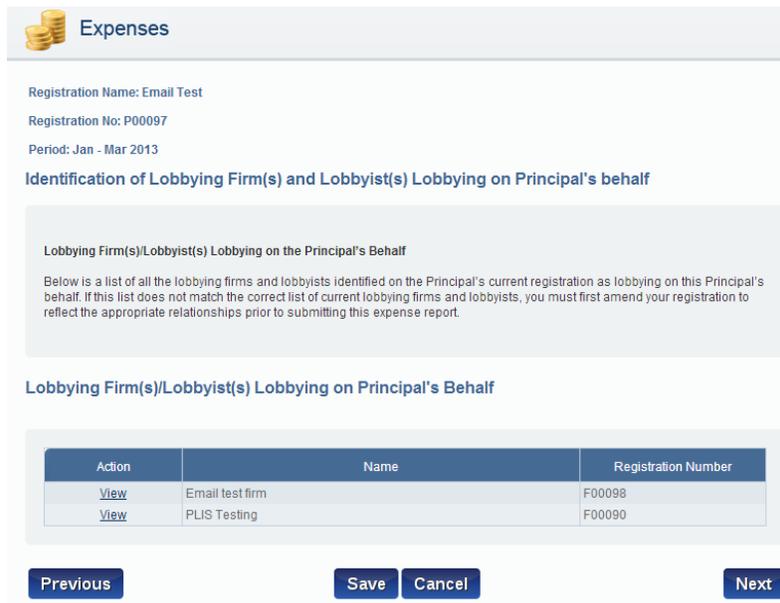
Name:	Email Test	Registration No:	P00097
Address:	100 Abington Executive Park Anytown PA 77777	E-mail:	nincollej@yahoo.com
Phone:	717-999-9999	Period:	Jan - Mar 2013

Step 6. Verify the Identification of Affiliations

If submitting an expense report as a Principal, all affiliated registrations will be displayed on the 'Identification of Lobbying Firm(s) and Lobbyist(s) Lobbying on Principal's Behalf' page.

If you are submitting an Expense Report as a Lobbying Firm or Lobbyist, the Affiliations page will not be displayed.

Click [Next] to advance to the next page of the wizard.



Expenses

Registration Name: Email Test
Registration No: P00097
Period: Jan - Mar 2013

Identification of Lobbying Firm(s) and Lobbyist(s) Lobbying on Principal's behalf

Lobbying Firm(s)/Lobbyist(s) Lobbying on the Principal's Behalf

Below is a list of all the lobbying firms and lobbyists identified on the Principal's current registration as lobbying on this Principal's behalf. If this list does not match the correct list of current lobbying firms and lobbyists, you must first amend your registration to reflect the appropriate relationships prior to submitting this expense report.

Lobbying Firm(s)/Lobbyist(s) Lobbying on Principal's Behalf

Action	Name	Registration Number
View	Email test firm	F00098
View	PLIS Testing	F00090

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

Step 7. Submit the Lobbying Expenses for the Quarter

The following steps will explain how to enter the following details:

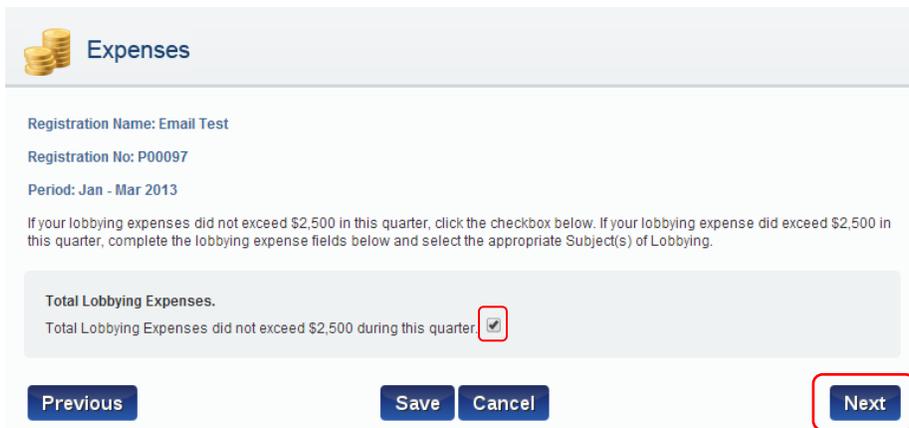
- Indication that Total Lobbying Expenses did not exceed \$2,500 during this quarter.
- Total Lobbying Expenses
 - Total Expenditures for Direct Communications
 - Total Expenditures for Indirect Communications
 - Total Expenditures for Gifts, Hospitality, Transportation, and Lodging to City Officials, Employees or their immediate families
- Lobbying Subject
- Direct Communication details
- Indirect Communication details
- Gifts, Hospitality, Transportation or Lodging to a City Official or Employee details
- Repayment details
- Source(s) of Contributions details

NOTE: Periodically clicking the [Save] button as you enter Expense Report details will save the details you have already entered up to that point. Otherwise, the data on the page will not be saved until the you click [Next] to advance to the next page of the wizard.

[Indicate if Lobbying Expenses did not exceed \\$2,500 during the quarter](#)

The user may indicate that the total lobbying expenses for the quarter did not exceed \$2,500 by selecting the 'Total Lobbying Expenses did not exceed \$2,500 during this quarter' checkbox. Selecting this checkbox will hide the remaining expense report details fields.

The user may proceed to the Summary and Affirmation page by clicking [Next].



Expenses

Registration Name: Email Test
Registration No: P00097
Period: Jan - Mar 2013

If your lobbying expenses did not exceed \$2,500 in this quarter, click the checkbox below. If your lobbying expense did exceed \$2,500 in this quarter, complete the lobbying expense fields below and select the appropriate Subject(s) of Lobbying.

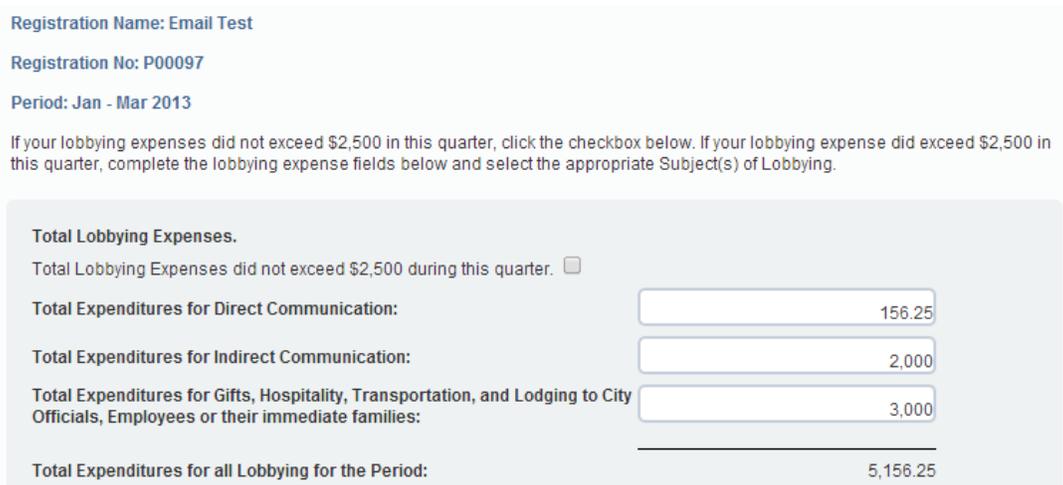
Total Lobbying Expenses.
Total Lobbying Expenses did not exceed \$2,500 during this quarter.

Previous Save Cancel **Next**

[If Lobbying Expenses Exceeded \\$2,500, Enter Total Lobbying Expense Details](#)

Enter the following Lobbying Expense details as applicable:

- Total Expenditures for Direct Communications
- Total Expenditures for Indirect Communications
- Total Expenditures for Gifts, Hospitality, Transportation, and Lodging to City Officials, Employees or their immediate families



Registration Name: Email Test
Registration No: P00097
Period: Jan - Mar 2013

If your lobbying expenses did not exceed \$2,500 in this quarter, click the checkbox below. If your lobbying expense did exceed \$2,500 in this quarter, complete the lobbying expense fields below and select the appropriate Subject(s) of Lobbying.

Total Lobbying Expenses.
Total Lobbying Expenses did not exceed \$2,500 during this quarter.

Total Expenditures for Direct Communication: 156.25

Total Expenditures for Indirect Communication: 2,000

Total Expenditures for Gifts, Hospitality, Transportation, and Lodging to City Officials, Employees or their immediate families: 3,000

Total Expenditures for all Lobbying for the Period: 5,156.25

Select Lobbying Subject(s)

Select the desired Subject of Lobbying by clicking on the relevant subject in the list and click [Add]. You may select multiple lobbying subjects by holding the 'ctrl' key while clicking on the desired lobbying subjects.



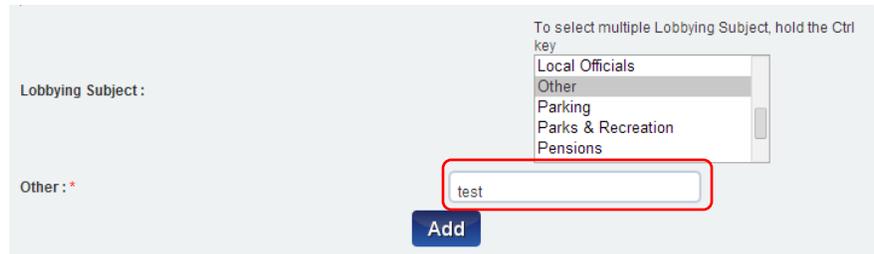
To select multiple Lobbying Subject, hold the Ctrl key

Lobbying Subject :

Add

Action	Subject of Lobbying
Delete	Alcoholic Beverages
Delete	Arts & Culture

If the desired Lobbying Subject does not appear in the list, select 'Other' from the list. A new field will be displayed for the user to enter the desired subject.



To select multiple Lobbying Subject, hold the Ctrl key

Lobbying Subject :

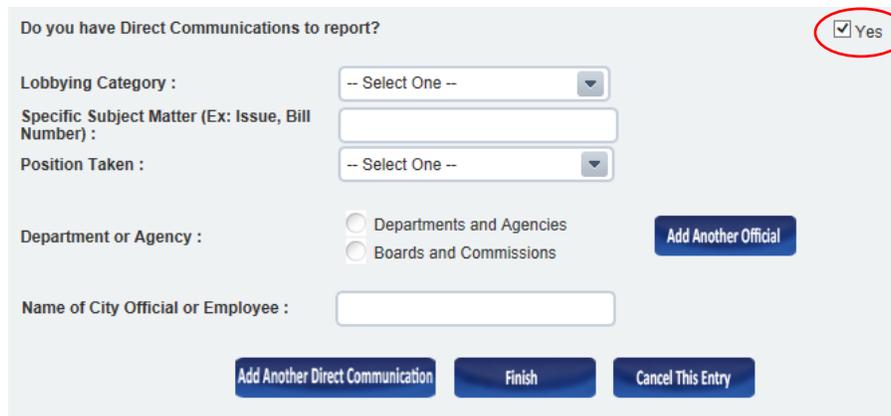
Other : *

test

Add

Enter any Direct Communication Details

If the user has any Direct Communications details to report, first select the 'Yes' checkbox for 'Do you have Direct Communications to report?'. Upon selecting this checkbox, the Direct Communication fields will be displayed.



Do you have Direct Communications to report? Yes

Lobbying Category : -- Select One --

Specific Subject Matter (Ex: Issue, Bill Number) :

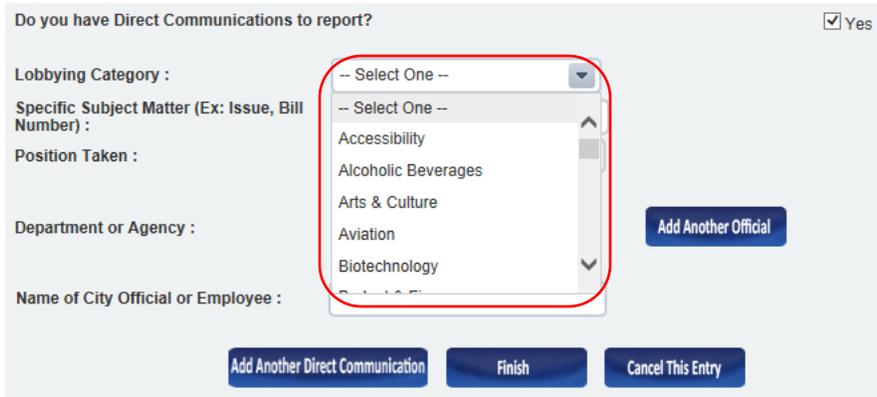
Position Taken : -- Select One --

Department or Agency : Departments and Agencies Boards and Commissions **Add Another Official**

Name of City Official or Employee :

Add Another Direct Communication **Finish** **Cancel This Entry**

Select the desired Lobbying Category from the drop-down list:



Do you have Direct Communications to report? Yes

Lobbying Category : -- Select One --

Specific Subject Matter (Ex: Issue, Bill Number) : -- Select One --

Position Taken : -- Select One --

Department or Agency : -- Select One --

Name of City Official or Employee : -- Select One --

Accessibility

Alcoholic Beverages

Arts & Culture

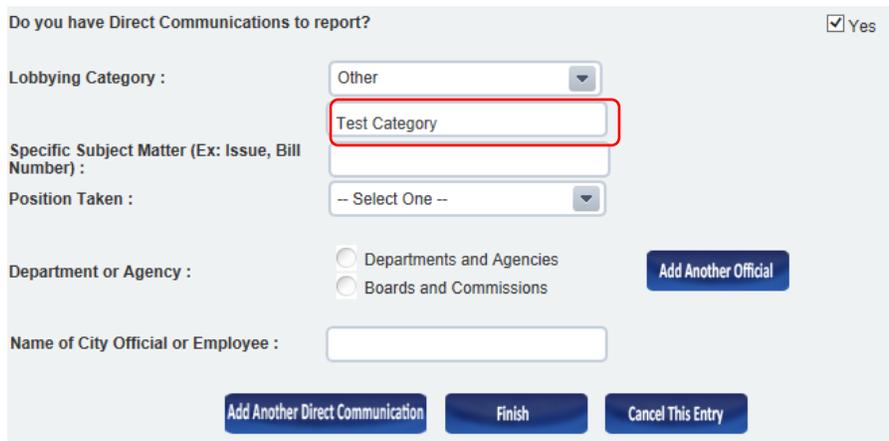
Aviation

Biotechnology

Add Another Official

Add Another Direct Communication Finish Cancel This Entry

If there is no applicable Lobbying Category in the drop-down list, select 'Other' and enter the Lobbying Category into the textbox.



Do you have Direct Communications to report? Yes

Lobbying Category : Other

Specific Subject Matter (Ex: Issue, Bill Number) : Test Category

Position Taken : -- Select One --

Department or Agency : Departments and Agencies Boards and Commissions

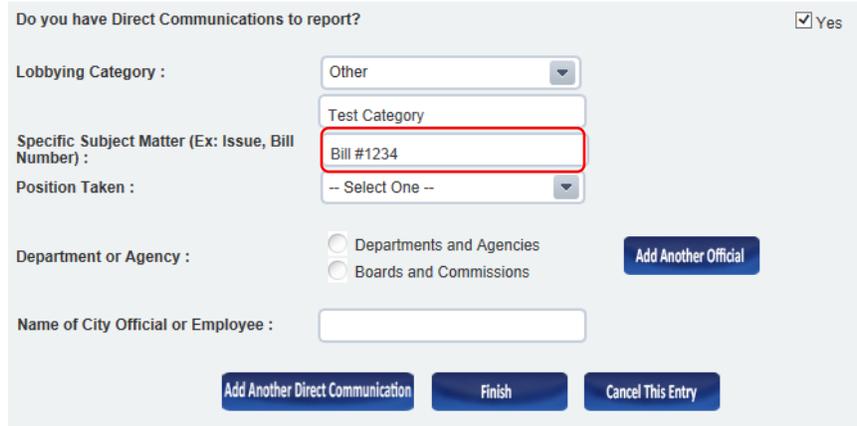
Name of City Official or Employee : -- Select One --

Add Another Official

Add Another Direct Communication Finish Cancel This Entry

Enter the Specific Subject Matter

Enter the specific subject matter (e.g., Bill number or contract number) by typing in the 'Specific Subject Matter' textbox:



Do you have Direct Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : -- Select One --

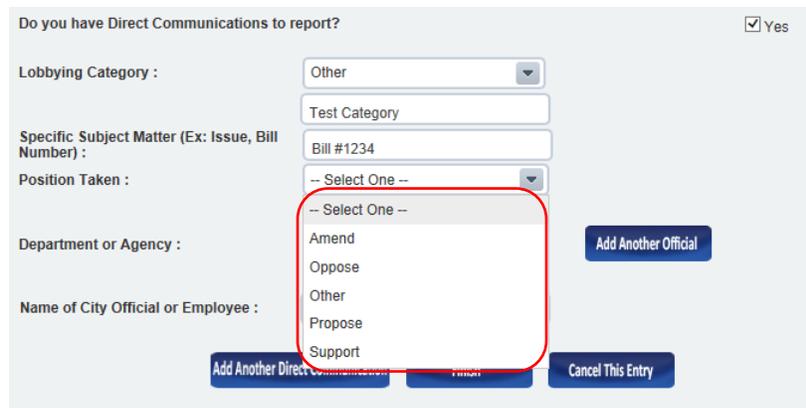
Department or Agency : Departments and Agencies Boards and Commissions [Add Another Official](#)

Name of City Official or Employee :

[Add Another Direct Communication](#) [Finish](#) [Cancel This Entry](#)

Select the Position Taken

Select the appropriate Position Taken from the drop-down.



Do you have Direct Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : -- Select One --

Department or Agency : Amend Oppose Other Propose Support [Add Another Official](#)

Name of City Official or Employee :

[Add Another Direct Communication](#) [Finish](#) [Cancel This Entry](#)

If none of the listed positions is correct, select 'Other' and enter the Position Taken in the textbox.

Do you have Direct Communications to report? Yes

Lobbying Category :

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

Select the Department or Agency

Select the appropriate radio button for a list of Departments and Agencies or Boards and Commissions:

Do you have Direct Communications to report? Yes

Lobbying Category :

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

Based on this selection, either the Departments and Agencies or Boards and Commissions drop-down will be populated. Select the desired Department/Agency or Board/Commission. Select “Other” if the Department, Agency, Board or Commission is not on the list.

Do you have Direct Communications to report? Yes

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

Enter the Name of the City Official or Employee

Based on the selected Department/Agency or Board/Commission, the Name of City Official or Employee will either be a drop-down or a textbox. Select an Official/Employee name from the drop-down, if available. If the name of the desired Official/Employee is not available in the drop-down, select ‘Other’. A textbox will be presented where the user may type the name of the Official/Employee.

Do you have Direct Communications to report? Yes

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

Enter Additional Officials

If there have been additional direct communications with other City officials and employees on the identical item (Category, Specific Subject Matter, and Position Taken), click the [Add Another Official] button. Then add the name of the additional City official or employee who was contacted on the identical matter. You will therefore not have to re-enter the 'Lobbying Category', 'Specific Subject Matter', and 'Position Taken' fields for that same matter.

Do you have Direct Communications to report? Yes

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency :
 Departments and Agencies
 Boards and Commissions

Name of City Official or Employee :

Add Another Official

Add Another Direct Communication **Finish** **Cancel This Entry**

Clicking the [Add Another Official] button will add the existing entry to the Direct Communications grid and only clear the 'Department or Agency' radio button selection, the drop-down and the 'Name of City Official or Employee' fields.

Do you have Direct Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Department or Agency	Name of City Official
Edit Delete	Test Category	Bill #1234	Test position	City Commissioners	Test Official

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency :
 Departments and Agencies
 Boards and Commissions

Name of City Official or Employee :

Add Another Official

Add Another Direct Communication **Finish** **Cancel This Entry**

Enter a new Direct Communication

To report a new Direct Communication click [Add Another Direct Communication].

Do you have Direct Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Department or Agency	Name of City Official
Edit Delete	Test Category	Bill #1234	Test Position	City Commissioners	Test Official

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

[Add Another Direct Communication](#) [Finish](#) [Cancel This Entry](#)

Clicking this button will update the Direct Communications grid with the currently populated Direct Communication details and will clear all Direct Communication fields so that you can add a new communication.

Do you have Direct Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Department or Agency	Name of City Official
Edit Delete	Test Category	Bill #1234	Test position	City Commissioners	Test Official
Edit Delete	Test Category	Bill #1234	Test position	Airport Advisory Board	John Smith

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Department or Agency : Departments and Agencies Boards and Commissions

Name of City Official or Employee :

[Add Another Direct Communication](#) [Finish](#) [Cancel This Entry](#)

If this is the user’s final Direct Communication entry, click [Finish]. Clicking [Finish] will update the Direct Communications grid and the Direct Communication fields will be hidden.



At any point the user may cancel an entry without deleting the grid entry by clicking [Cancel This Entry]. Upon clicking [Cancel This Entry], the Direct Communication fields will be hidden.



The user may add additional Direct Communication entries by clicking the [Add Another Direct Communication] button directly below the Direct Communications grid.

Do you have Direct Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Department or Agency	Name of City Official
Edit Delete	Test Category	Bill #1234	Test Position	City Commissioners	Test Official
Edit Delete	Test Category	Bill #1234	Test Position	Airport Advisory Board	John Smith

[Add Another Direct Communication](#)

[Enter Indirect Communication Details](#)

If the user has any Indirect Communications details to report, first select the 'Yes' checkbox for 'Do you have Indirect Communications to report?'. Upon selecting this checkbox, the Indirect Communication fields will be displayed.



Do you have Indirect Communications to report? Yes

Lobbying Category : -- Select One --

Specific Subject Matter (Ex: Issue, Bill Number) :

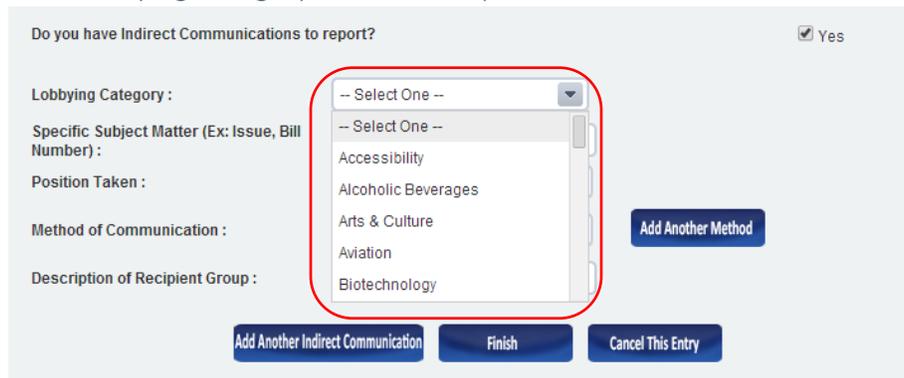
Position Taken : -- Select One --

Method of Communication : -- Select One -- **Add Another Method**

Description of Recipient Group :

Add Another Indirect Communication **Finish** **Cancel This Entry**

Select the desired Lobbying Category from the drop-down list:



Do you have Indirect Communications to report? Yes

Lobbying Category : -- Select One --

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken : -- Select One --

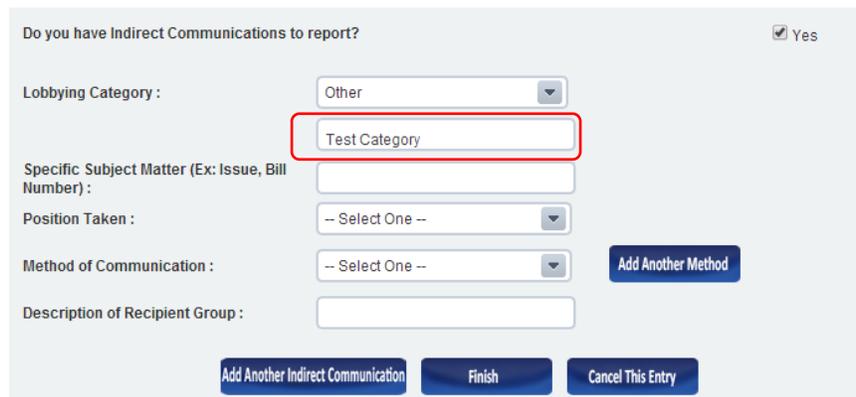
Method of Communication : -- Select One -- **Add Another Method**

Description of Recipient Group :

Add Another Indirect Communication **Finish** **Cancel This Entry**

- Select One --
- Accessibility
- Alcoholic Beverages
- Arts & Culture
- Aviation
- Biotechnology

If there is no applicable Lobbying Category, select 'Other' and enter the Lobbying Category into the textbox.



Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken : -- Select One --

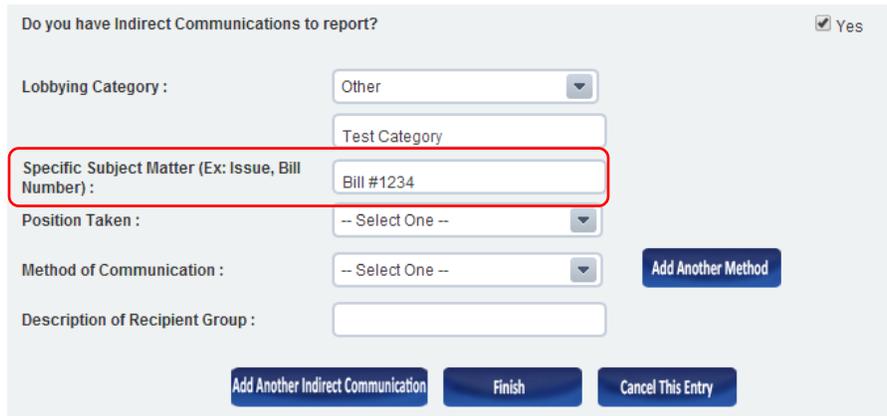
Method of Communication : -- Select One -- **Add Another Method**

Description of Recipient Group :

Add Another Indirect Communication **Finish** **Cancel This Entry**

Enter the Specific Subject Matter

Enter the subject matter by typing in the 'Specific Subject Matter' textbox:



Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : -- Select One --

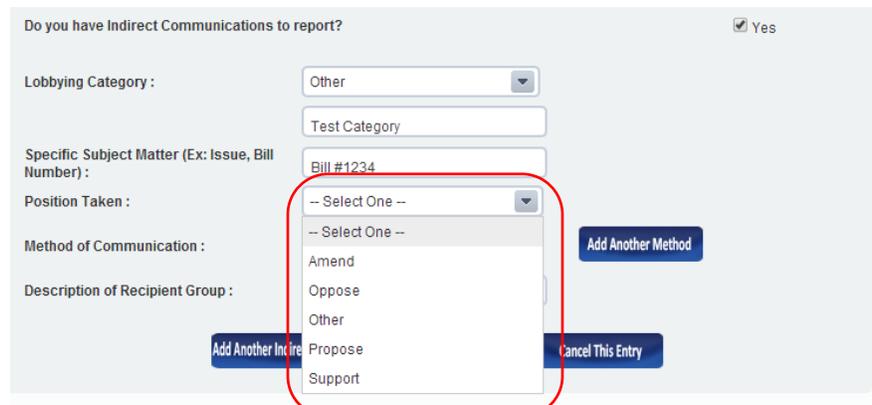
Method of Communication : -- Select One -- [Add Another Method](#)

Description of Recipient Group :

[Add Another Indirect Communication](#) [Finish](#) [Cancel This Entry](#)

Select the Position Taken

Select the appropriate Position Taken from the drop-down.



Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : -- Select One --

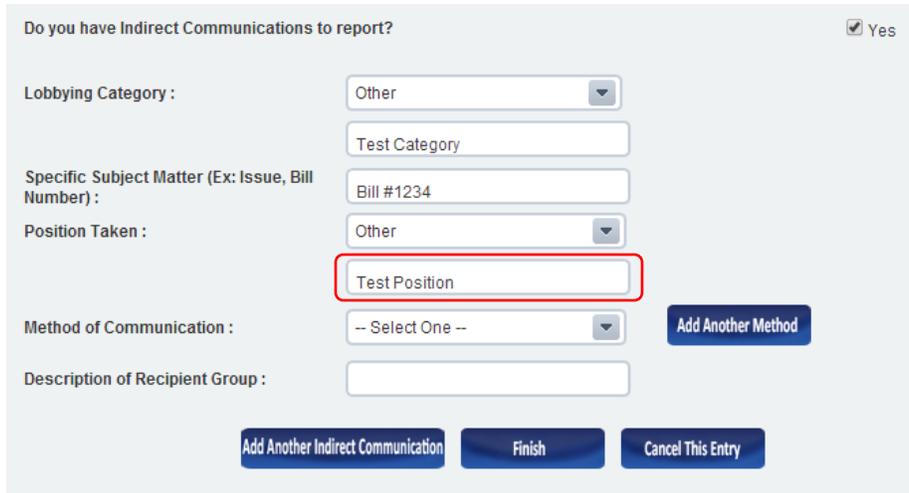
Method of Communication : -- Select One -- [Add Another Method](#)

Description of Recipient Group :

[Add Another Indirect Communication](#) [Cancel This Entry](#)

- Select One --
- Amend
- Oppose
- Other
- Propose
- Support

If none of the listed positions is correct, select 'Other' and enter the Position Taken in the textbox.



Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : Other

Test Position

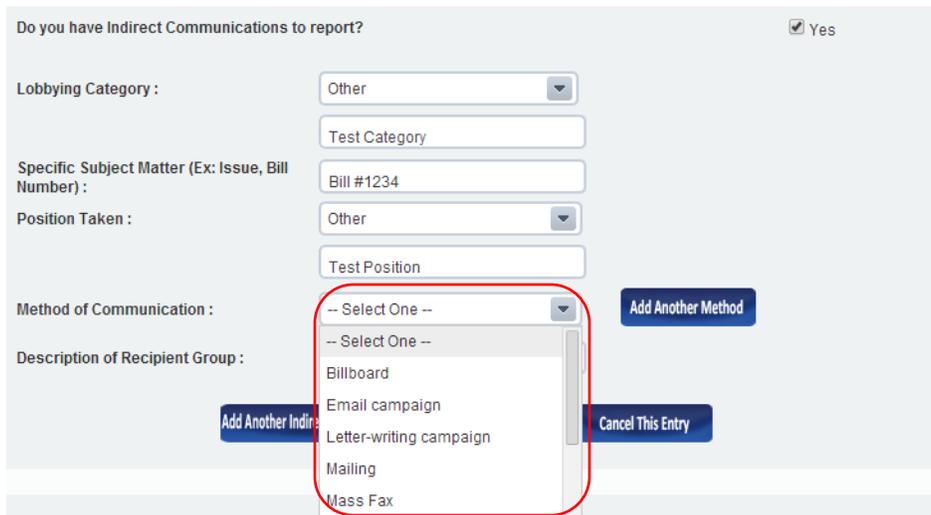
Method of Communication : -- Select One -- [Add Another Method](#)

Description of Recipient Group :

[Add Another Indirect Communication](#) [Finish](#) [Cancel This Entry](#)

Select a Method of Communication

Select the appropriate Method of Communication from the drop-down.



Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : Other

Test Position

Method of Communication : -- Select One --

- Select One --
- Billboard
- Email campaign
- Letter-writing campaign
- Mailing
- Mass Fax

Description of Recipient Group :

[Add Another Indirect Communication](#) [Add Another Method](#) [Cancel This Entry](#)

If none of the listed methods is correct, select 'Other' and enter the Method in the textbox.

Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : Other

Test Position

Method of Communication : Other

Test Method

Description of Recipient Group :

Enter the Description of Recipient Group

Enter the recipient group description by typing in the 'Description of Recipient Group' textbox.

Do you have Indirect Communications to report? Yes

Lobbying Category : Other

Test Category

Specific Subject Matter (Ex: Issue, Bill Number) : Bill #1234

Position Taken : Other

Test Position

Method of Communication : Other

Test Method

Description of Recipient Group : Testing group

Clicking the [Add Another Method] button will add the existing entry to the Indirect Communications grid and will clear the 'Method of Communication' and 'Description of Recipient Group' fields.

Do you have Indirect Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Method of Communication	Recipient Group
Edit Delete	Test Category	Bill #1234	Test Position	Test Method	Testing Group

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Method of Communication :

Enter a new Indirect Communication

Report another Indirect Communication by clicking [Add Another Indirect Communication].

Do you have Indirect Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Method of Communication	Recipient Group
Edit Delete	Test Category	Bill #1234	Test Position	Test Method	Testing Group

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Method of Communication :

Clicking this button will update the Indirect Communications grid with the currently populated Indirect Communication details and will clear all Indirect Communication fields.

Do you have Indirect Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Method of Communication	Recipient Group
Edit Delete	Test Category	Bill #1234	Test Position	Test Method	Testing Group
Edit Delete	Test Category	Bill #1234	Test Position	Billboard	General public

Lobbying Category :

Specific Subject Matter (Ex: Issue, Bill Number) :

Position Taken :

Method of Communication : [Add Another Method](#)

Description of Recipient Group :

[Add Another Indirect Communication](#) [Finish](#) [Cancel This Entry](#)

If this is the user's final Indirect Communication entry, click [Finish]. Clicking [Finish] will update the Indirect Communications grid and the Indirect Communication fields will be hidden.



At any point the user may cancel the current entry without deleting the grid entry by clicking [Cancel This Entry]. Upon clicking [Cancel This Entry], the Indirect Communication fields will be hidden.



The user may add additional Indirect Communication entries by clicking the [Add Another Indirect Communication] button directly below the Indirect Communications grid.

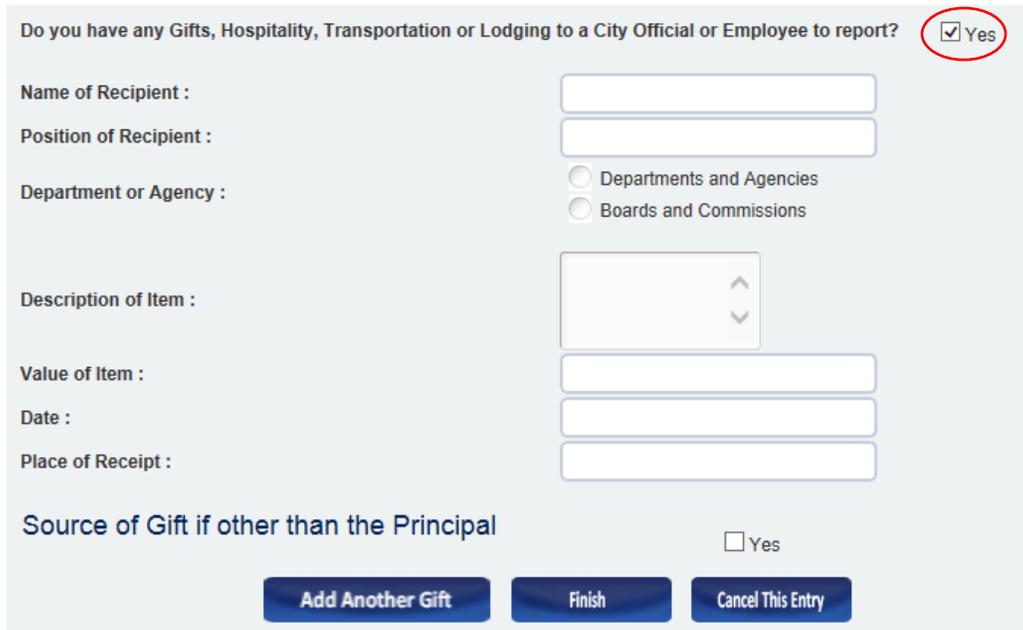
Do you have Indirect Communications to report? Yes

Action	Lobbying Category	Subject Matter	Position Taken	Method of Communication	Recipient Group
Edit Delete	Test Category	Bill #1234	Test Position	Test Method	Testing Group
Edit Delete	Test Category	Bill #1234	Test Position	Billboard	General public

[Add Another Indirect Communication](#)

[Enter any Gifts, Hospitality, Transportation, or Lodging to a City Official or Employee](#)

If the user has any Gifts, Hospitality, Transportation, or Lodging to a City Official or Employee details to report, first select the 'Yes' checkbox for 'Do you have any Gifts, Hospitality, Transportation, or Lodging to a City Official or Employee to report?'. Upon selecting this checkbox, the Gifts, Hospitality, Transportation, or Lodging to a City Official or Employee fields will be displayed.



Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

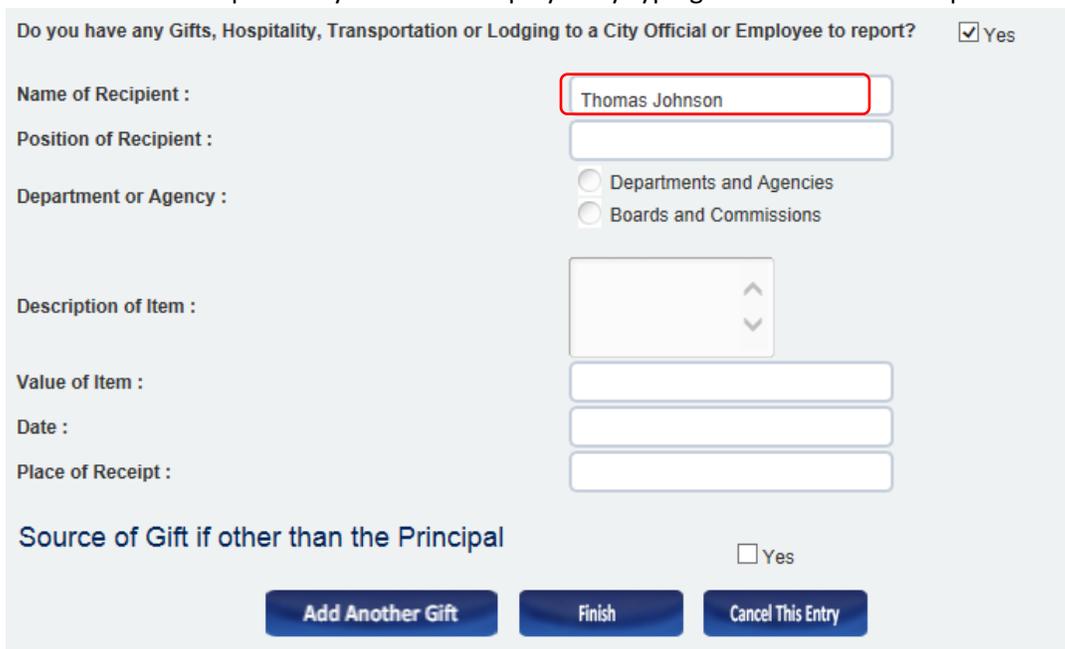
Place of Receipt :

Source of Gift if other than the Principal Yes

[Add Another Gift](#) [Finish](#) [Cancel This Entry](#)

Enter the Name of Recipient

Enter the name of the recipient City official or employee by typing in the 'Name of Recipient' textbox.



Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

[Add Another Gift](#) [Finish](#) [Cancel This Entry](#)

Enter the Position of the Recipient

Enter the position of the recipient City official or employee by typing in the 'Position of Recipient' textbox.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Select the Department or Agency

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Use the radio buttons to select either the Department and Agency or Board and Commission drop-down list.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency :
 Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Enter the Item Description

Enter the description of the item by typing in the 'Description of Item' textbox.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Enter the Item's Value

Enter the value of the item by typing in the 'Value of Item' textbox.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Enter the Date

Enter the date the item was given by typing in the 'Date' textbox.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Enter the Place of Receipt

Enter the place of receipt of the item by typing in the 'Place of Receipt' textbox.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

Indicate if the Source of the Gift was not the Principal

If a source other than the Principal provided the item on behalf of the Principal, click the “Yes” checkbox to report the ‘Source of Gift if other than the Principal.’

Source of Gift if other than the Principal Yes

This will display additional fields to capture the source details.

Source of Gift if other than the Principal Yes

Name :

Source Address Information

Address Line 1 :

Address Line 2 :

City :

State : PA

Zip :

Populate the ‘Name’ and ‘Address’ fields.

To Submit another Gift, click on the [Add Another Gift] button. This will update the Gifts grid with the current Gift data and clear the fields for a new entry.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Action	Name of Recipient	Department	Position	Description	Value	Date	Place of Receipt	Source of Gift
Edit Delete	Thomas Johnson	Revenue Department	Revenue CIO	NFL Tickets	\$350.00	1/1/2013	Le Meridian Hotel	

Name of Recipient :

Position of Recipient :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Date :

Place of Receipt :

Source of Gift if other than the Principal Yes

[Add Another Gift](#) [Finish](#) [Cancel This Entry](#)

If this is the final Gift, click the [Finish] button. This will update the Gifts grid and hide the Gifts fields.



At any point the user may cancel the current entry without deleting the grid entry by clicking [Cancel This Entry]. Upon clicking [Cancel This Entry], the Gifts fields will be hidden.



The user may add additional Gifts entries by clicking the [Add Another Gift] button directly below the Gifts grid.

Do you have any Gifts, Hospitality, Transportation or Lodging to a City Official or Employee to report? Yes

Action	Name of Recipient	Department	Position	Description	Value	Date	Place of Receipt	Source of Gift
Edit Delete	Thomas Johnson	Revenue Department	Revenue CIO	Weekend cabin rental	\$250.00	2/01/2013	Bedford, PA	

[Add Another Gift](#)

[Enter any Repayments from City Officials or Employees for Gifts, Hospitality, Transportation, or Lodging](#)

If the user has received any Repayments from City Officials or Employees for Gifts, Hospitality, Transportation, or Lodging, first select the 'Yes' checkbox for 'Do you have any Repayments from City Officials or Employees for Gifts, Hospitality, Transportation, or Lodging details to report?'. Upon selecting this checkbox, the Repayments from City Officials or Employees for Gifts, Hospitality, Transportation, or Lodging details fields will be displayed.

[Enter the Recipient Name](#)

Enter the name of the City official or employee who made a repayment to you by typing the name into the 'First Name', 'Middle Initial' (if applicable) and 'Last Name' fields

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Middle Initial :

Last Name :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Repayment Amount :

Select the Department or Agency

Select the appropriate radio button for either Departments and Agencies or Boards and Commissions:

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Terry Middle Initial :

Last Name : Smith

Department or Agency : Departments and Agencies
 Boards and Commissions

-- Select One --

Description of Item :

Value of Item :

Repayment Amount :

[Add Another Repayment](#) [Finish](#) [Cancel This Entry](#)

Use the drop down list to select the desired Department or Agency or Board or Commission.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Terry Middle Initial :

Last Name : Smith

Department or Agency : Departments and Agencies
 Boards and Commissions

Arts, Culture & Creative Econom

Description of Item :

Value of Item :

Repayment Amount :

[Add Another Repayment](#) [Finish](#) [Cancel This Entry](#)

Enter the Item Description

Enter the description of the item for which you received the repayment by typing in the 'Description of Item' textbox.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Middle Initial :

Last Name :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Repayment Amount :

Enter the Item's Value

Enter the value of the item by typing in the 'Value of Item' textbox.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Middle Initial :

Last Name :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Repayment Amount :

Enter the Repayment Amount

Enter the amount that was repaid by typing the value in the 'Repayment Amount' textbox.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Recipient Information

First Name : Middle Initial :

Last Name :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Repayment Amount :

[Add Another Repayment](#) [Finish](#) [Cancel This Entry](#)

To Submit another Repayment, click on the [Add Another Repayment] button. This will update the Repayments grid with the current Repayment data and clear the fields for a new entry.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Action	Recipient Name	Department or Agency	Value of Item	Repayment Amount
Edit Delete	Terry Smith	Arts, Culture & Creative Economy	\$250.00	\$125.00

Recipient Information

First Name :

Last Name :

Department or Agency : Departments and Agencies
 Boards and Commissions

Description of Item :

Value of Item :

Repayment Amount :

[Add Another Repayment](#) [Finish](#) [Cancel This Entry](#)

If this is the last Repayment item, click on the [Finish] button. This will update the Repayments grid and hide the Repayment fields.



At any point the user may cancel a current entry without deleting the grid entry by clicking [Cancel This Entry]. Upon clicking [Cancel This Entry], the Gifts fields will be hidden.



The user may add additional Repayment entries by clicking the [Add Another Repayment] button directly below the Repayments grid.

Do you have any repayments from City Officials or Employees for Gifts, Hospitality, Transportation or Lodging to report? Yes

Action	Recipient Name	Department or Agency	Value of Item	Repayment Amount
Edit Delete	Terry Smith	Arts, Culture & Creative Economy	\$250.00	\$125.00

[Add Another Repayment](#)

[Enter any Sources of Contribution](#)

If any individual, association, corporation, partnership, business trust or other business entity contributed more than 10% of the principals resources in this quarter, select the 'Yes' checkbox for 'Do you have any Source(s) of Contributions of more than 10% of your resources in this quarter details to report?'. Upon selecting this checkbox, the Sources of Contribution detail fields will be displayed.

Do you have any Source(s) of Contributions of more than 10% of your resources in this quarter to report? Yes

Source of Contribution

Name :

Address Information

Address Line 1 :

Address Line 2 :

City :

State : PA

Zip :

Contact Information

Phone Number : Ext.

Fax Number :

Email Address :

Enter the Source of Contribution Name

Enter the name of the Source of the Contribution by typing in the 'Name' textbox.

Do you have any Source(s) of Contributions of more than 10% of your resources in this quarter to report? Yes

Source of Contribution

Name :

Enter the Address of the Source of the Contribution

Enter the address of the Source of the Contribution by typing in the address fields.

Address Information

Address Line 1 :

Address Line 2 :

City :

State :

Zip :

Enter the Contact Details for the Source of the Contribution

Enter the contact details of the Source of Contribution by typing in the contact fields.

Contact Information

Phone Number : Ext.

Fax Number :

Email Address :

To Submit another Source of Contributions, click on the [Add Another Source] button. This will update the Source of Contribution grid with the current Source of Contribution data and clear the fields for a new entry.

Do you have any Source(s) of Contributions of more than 10% of your resources in this quarter to report? Yes

Source of Contributions

Action	Name
Edit Delete	Test Contributor

Source of Contribution

Name :

Address Information

Address Line 1 :

Address Line 2 :

City :

State : PA

Zip :

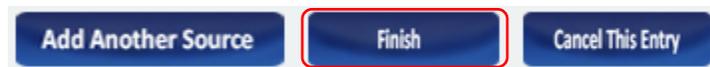
Contact Information

Phone Number : Ext.

Fax Number :

Email Address :

If this is the final Source of Contribution, click on the [Finish] button. This will update the Source of Contribution grid and hide the Source of Contribution fields.



At any point the user may cancel the current entry without deleting the grid entry by clicking [Cancel This Entry]. Upon clicking [Cancel This Entry], the Source of Contribution fields will be hidden.



The user may add additional Sources of Contributions by clicking the [Add Another Source] button directly below the Source of Contribution grid.

Do you have any Source(s) of Contributions of more than 10% of your resources in this quarter to report? Yes

Source of Contributions

Action	Name
Edit Delete	Test Contributor

[Add Another Source](#)

[Save or Submit the Expense Report](#)

Click [Next] to advance to the Expense Report Summary page.

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

User with Filing Permissions:

If the user is a **User with Filing Permissions**, the user will see a [Save and Close] button.

[Previous](#)
[Cancel](#)
[Save and Close](#)

Registration Owner:

If the user is the **Registration Owner**, click to Affirm, complete the identification fields, and click the [Submit] button.

Affirmation

By affixing my signature to this expense report, I affirm that I have actual knowledge of the contents of this expense report and that the information reported herein is valid, accurate, and complete to the best of my knowledge. To the best of my knowledge at all times relevant to this quarterly expense reporting period, I have complied with the requirements of City Code §20-1205(5). I acknowledge that this affirmation is being made subject to 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities). I consent to receive service of notices, other official mailings, or process at the address or email listed in this expense report.

First Name :
Middle Initial :

Last Name :

Title :

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

[Submitting an Expense Report Amendment](#)

To amend an Expense Report, click Amend next to the Submitted Expense Report to be amended. Proceed through the Expense Report Wizard making the desired changes.

Expense Reports

Registration Period

Page of 3 [View All](#)

Action	Registration Name	Status	Registration No.	Registration Type	Period	Last Update
Filter Clear	<input type="text"/>	All	<input type="text"/>	All	All	
View Amend	Email Test	Submitted	P00097	Principal	Jan - Mar 2013	03/11/2014
Submit	Email Test	Late	P00097	Principal	Apr - Jun 2013	
Submit	Email Test	Late	P00097	Principal	Jul - Sep 2013	
View Amend	Email Test	Submitted	P00097	Principal	Oct - Dec 2013	03/06/2014