



# **Lobbyist Registration**

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## ***User Guide***

Department of  
Business & Neighborhood Services

**Applicant's User Guide**  
**August 2017**

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# CREATING A CITIZEN ACCESS ACCOUNT

The lobbyist registration process is through the Department of Business & Neighborhood Services' (DBNS) web-based Citizen Access Portal. This application process allows applicants to file the lobbyist registration 100% electronically without having to visit DBNS's office.

## Citizen Access Portal User Requirements

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### Internet Browser

The Citizen Access Portal will need one of the following web browsers:

Internet Explorer 10

Google Chrome 34

Mozilla Firefox 29

Safari 6

## Navigating to the Citizen's Access Portal

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The direct link to the Citizen Access Portal is:

<https://permitsandcases.indy.gov/citizenAccess/>

The Citizen Access Portal can be accessed through the DBNS website by using the link on the left side of the page.


[www.indy.gov/BNS](http://www.indy.gov/BNS)

# CREATING A CITIZEN ACCESS ACCOUNT

## 1. Account Login

On the Citizen Access Portal homepage, click the link labeled 'New Users,' located below the login fields, to create an account.

The next screen contains terms and conditions to create an account. Please read before proceeding.



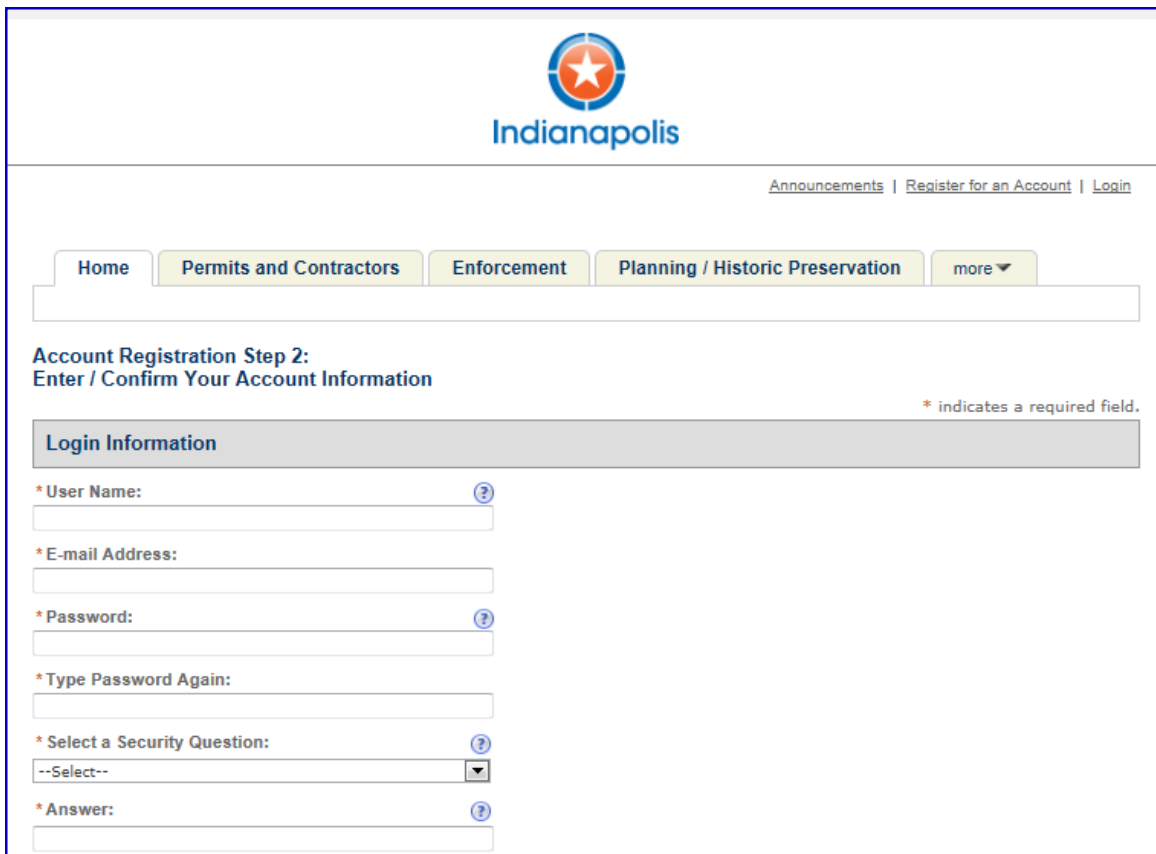
The screenshot shows the 'Account Registration' page on the Indianapolis Citizen Access Portal. At the top, there is the Indianapolis logo and navigation links for 'Announcements', 'Register for an Account', and 'Login'. Below this is a menu with 'Home', 'Permits and Contractors', 'Enforcement', 'Planning / Historic Preservation', and a 'more' dropdown. The main heading is 'Account Registration', followed by a note that users will be asked to provide information to open an account. A bulleted list includes: 'Choose a user name and password', 'Personal and Contact Information', and 'License Numbers if you are registering as a licensed professional (optional)'. A paragraph asks users to review and accept the terms. An 'IMPORTANT' notice states that the Terms of Use constitute a legal agreement between the City and the user. A scrollable text box contains the full terms and conditions. At the bottom, there is a checked checkbox for 'I have read and accepted the above terms.' and a 'Continue Registration' button. The footer includes copyright information for 2010 Accela Inc.

# CREATING A CITIZEN ACCESS ACCOUNT

## 2. Login Information

On the next screen, create a user name and password.

The user name and password created will be used to gain access into the portal.



The screenshot shows the 'Account Registration Step 2: Enter / Confirm Your Account Information' page. At the top, there is the Indianapolis logo and navigation links for 'Announcements', 'Register for an Account', and 'Login'. Below this is a menu with buttons for 'Home', 'Permits and Contractors', 'Enforcement', 'Planning / Historic Preservation', and a 'more' dropdown. The main content area is titled 'Account Registration Step 2: Enter / Confirm Your Account Information' and includes a note that an asterisk indicates a required field. The 'Login Information' section contains the following fields:

- \* User Name:
- \* E-mail Address:
- \* Password:
- \* Type Password Again:
- \* Select a Security Question:
- \* Answer:

# CREATING A CITIZEN ACCESS ACCOUNT

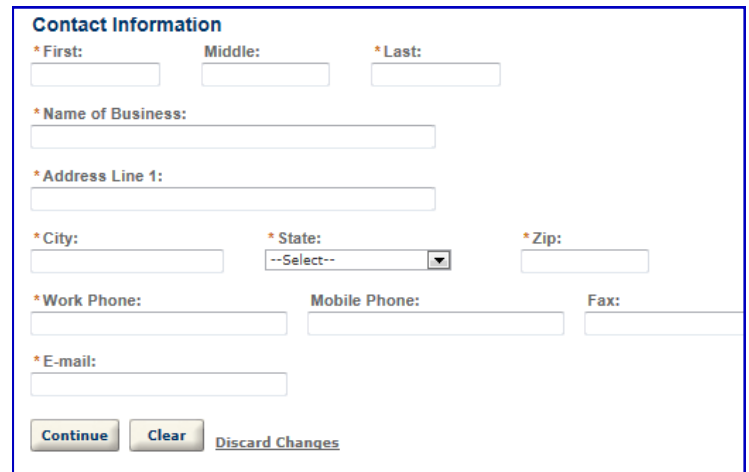
## 3. Contact Information

Below the Login Information, enter the contact information.

Click the 'Add New' button to proceed.

Input information in the popup screen and press the 'Continue' button.

Note: The email address entered will be used to verify the account in the next step.



The screenshot shows a 'Contact Information' form with the following fields: \* First, Middle, \* Last (text boxes); \* Name of Business (text box); \* Address Line 1 (text box); \* City, \* State (dropdown menu), \* Zip (text box); \* Work Phone, Mobile Phone, Fax (text boxes); and \* E-mail (text box). At the bottom are buttons for 'Continue', 'Clear', and 'Discard Changes'.

## 4. Continue Registration & Verification

After reviewing the contact information entered, click the 'Continue Registration' button to submit the new account request.



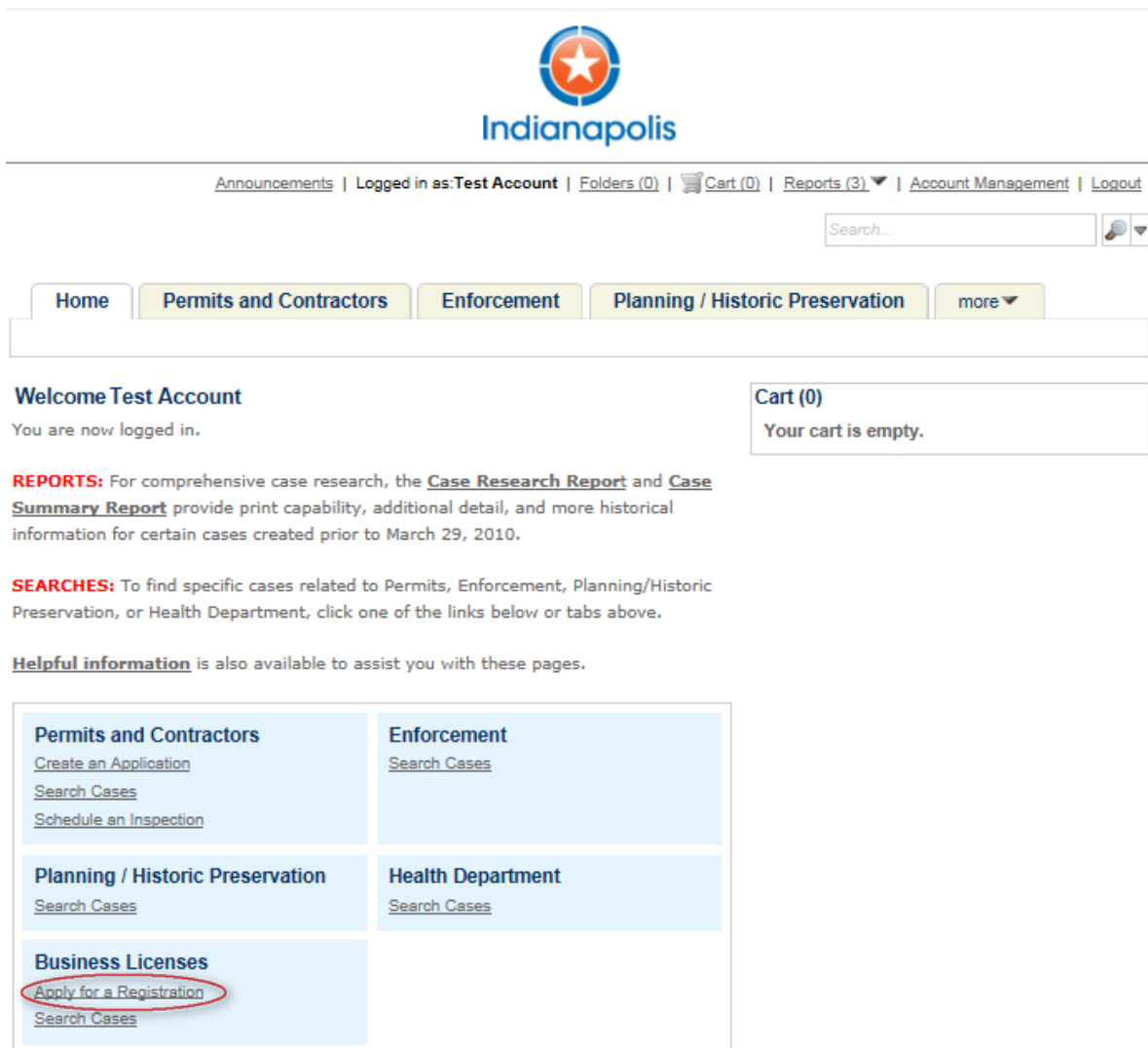
To complete the account creation, check your email for an email from BNS.noreply@indy.gov. Click the link in this email to verify the account email address and be directed back to the Citizen Access login screen. Your account cannot be used until this email verification link is clicked.

Applicants can now log in with the username and password and create a lobbyist registration.

# CREATING THE LOBBYIST REGISTRATION

## 1. Opening a new registration

After logging into the Portal, click the link 'Apply for a Registration' under the Business Licenses heading.

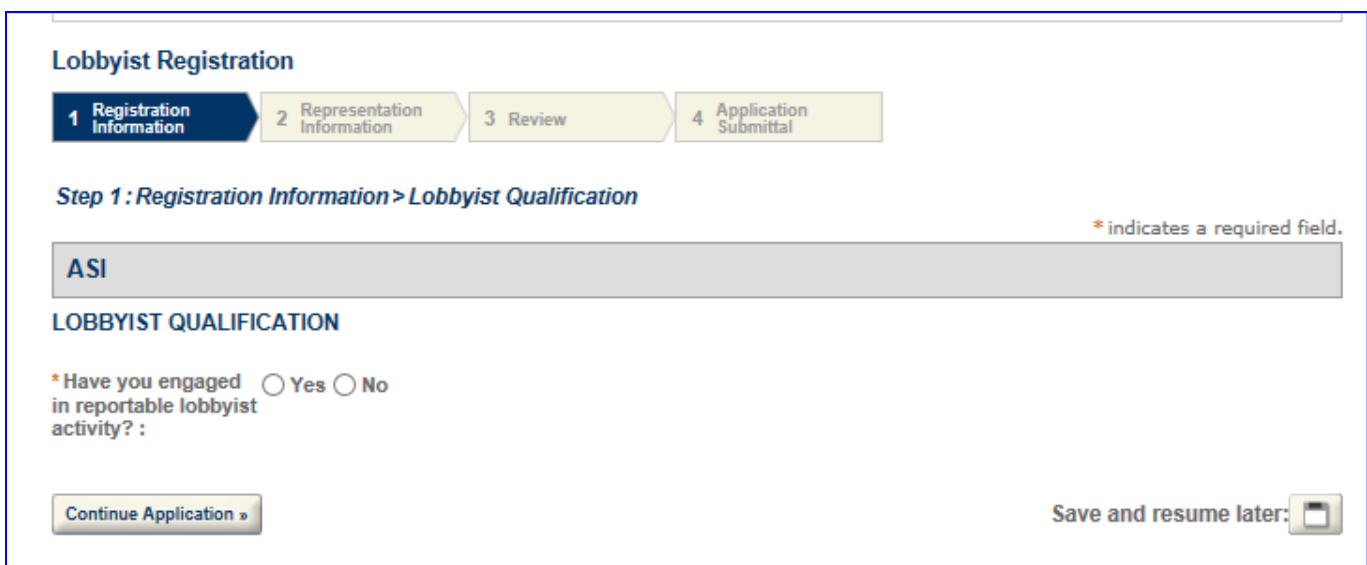


The screenshot shows the Indianapolis Portal dashboard. At the top is the Indianapolis logo. Below it is a navigation bar with links for Announcements, Logged in as: Test Account, Folders (0), Cart (0), Reports (3), Account Management, and Logout. A search bar is located to the right of the navigation bar. Below the navigation bar are several tabs: Home, Permits and Contractors, Enforcement, Planning / Historic Preservation, and more. The main content area is divided into two columns. The left column contains a welcome message for the Test Account, a section for Reports, a section for Searches, and a section for Helpful information. The right column contains a Cart (0) notification. Below the main content area is a grid of links for various services: Permits and Contractors (Create an Application, Search Cases, Schedule an Inspection), Enforcement (Search Cases), Planning / Historic Preservation (Search Cases), Health Department (Search Cases), and Business Licenses (Apply for a Registration, Search Cases). The 'Apply for a Registration' link is circled in red.

# CREATING THE LOBBYIST REGISTRATION

After clicking the link to start the registration, review the terms and conditions page and select the check box to access the registration.

The progress bar at the top of the application guides applicants through the steps of the registration. The 'Save and resume later' button at the bottom right of the screen allows applicants to save entered information and resume the registration at a later time.



The screenshot shows the 'Lobbyist Registration' progress bar with four steps: 1. Registration Information (active), 2. Representation Information, 3. Review, and 4. Application Submittal. Below the progress bar, the current step is 'Step 1: Registration Information > Lobbyist Qualification'. A text input field contains 'ASI'. A legend indicates that an asterisk (\*) denotes a required field. Below the input field, there is a question: '\* Have you engaged in reportable lobbyist activity?' with radio button options for 'Yes' and 'No'. At the bottom left is a 'Continue Application' button, and at the bottom right is a 'Save and resume later' button with a document icon.

## 1. Qualification

You will have to select whether or not you have engaged in lobbying activity at the City/County level that is required to be reported. The lobbyist registration ordinance with definitions and other resources can be found at [www.indy.gov/lobbyist](http://www.indy.gov/lobbyist)

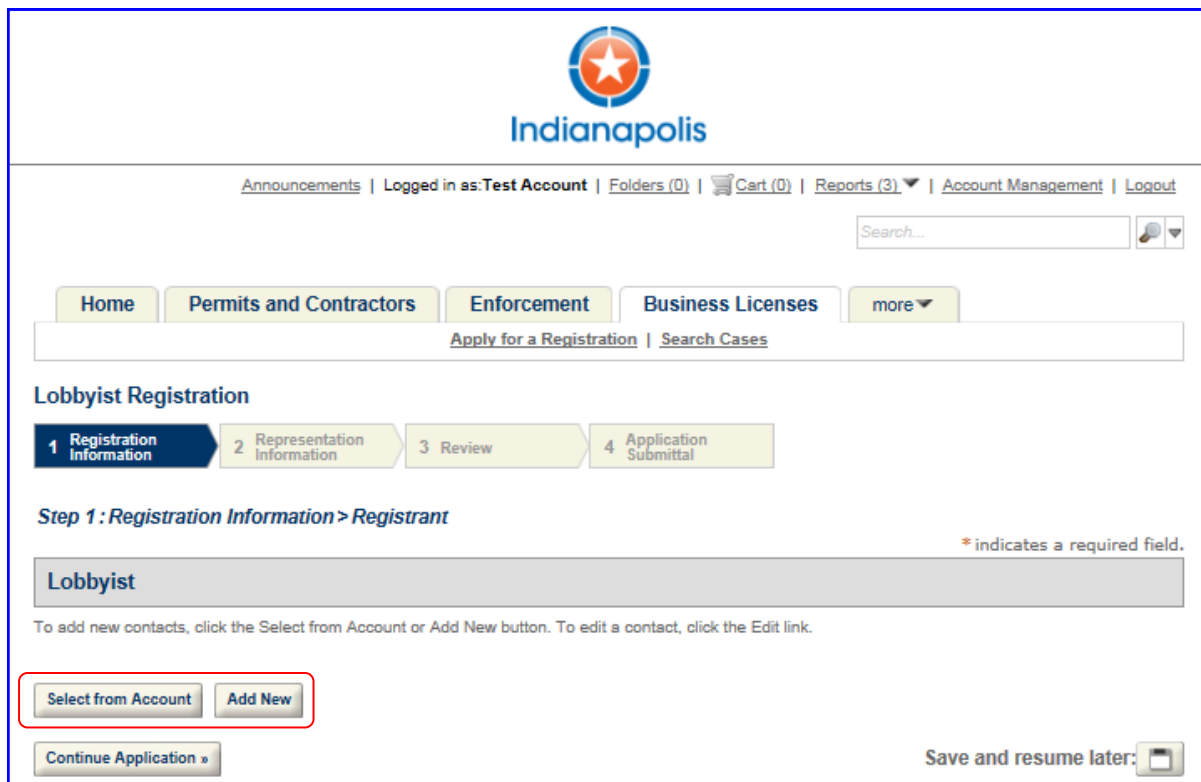
If you select no, you do not need to report at this time. If needed, please use the 'Save and resume later' button and complete the application at a later date.



# CREATING THE LOBBYIST REGISTRATION

## 2. Entering Lobbyist information on the registration

On the Registration Information page, enter the lobbyist's contact information. To use the contact information from the Citizen Access user account, click the 'Select from Account' button. Click the 'Add New' button to enter in new contact information.



The screenshot shows the Indianapolis City website interface for the Lobbyist Registration process. At the top, the Indianapolis logo is displayed. Below it, a navigation bar includes links for Announcements, Logged in as: Test Account, Folders (0), Cart (0), Reports (3), Account Management, and Logout. A search bar is also present. The main navigation menu includes Home, Permits and Contractors, Enforcement, Business Licenses, and a 'more' dropdown. Below the navigation, there are links for 'Apply for a Registration' and 'Search Cases'. The 'Lobbyist Registration' section features a progress bar with four steps: 1. Registration Information (highlighted), 2. Representation Information, 3. Review, and 4. Application Submittal. Below the progress bar, the current step is 'Step 1: Registration Information > Registrant'. A note indicates that an asterisk (\*) indicates a required field. The 'Lobbyist' form area contains a text input field. Below the form, there are instructions: 'To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link.' Two buttons, 'Select from Account' and 'Add New', are highlighted with a red box. At the bottom of the form, there is a 'Continue Application' button and a 'Save and resume later' option with a document icon.

# CREATING THE LOBBYIST REGISTRATION

## 3. Entering the representation information

On the Representation Information page, you will need to enter in the information for both the lobbyist's employer as well as any Real Party in Interest.

### Employer

Select the 'Add new' button under the Employer heading. You will be prompted to enter in the information for business contact information.

### Real Party in Interest

For each party the lobbyist represents, a new 'Real Party in Interest' contact will need to be added.

- Select the option for 'Add New'.
- You will be prompted to enter in the contact information for each Real Party in Interest.
- Before clicking the 'Continue' button, you will need to add the agencies that are lobbied to & and log any compensation.

-Click the button

for 'Add a Row'

-You will be prompted to select the agency and subject matter

-Click submit.

After all the agencies have been added, click the 'Continue' button.

After all the parties in interest have been added, click the 'Continue Application' button.

**Contact Information**

\* First:  Middle:  \* Last:

Name of Business:

\* Address Line 1:

\* City:  \* State:  \* Zip:

\* Primary Phone:  Alternate Phone:  Fax:

\* E-mail:

Web Sites:

**AGENCIES**

Showing 0-0 of 0

Agency	Subject Matter Engagement	Monetary Compensation	Non-Monetary Compensation	Individual Recipient
No records found.				

[Add a Row](#) [Edit Selected](#) [Delete Selected](#)

**AGENCIES**

\* Agency:

\* Subject Matter Engagement:

\* Monetary Compensation:

\* Non-Monetary Compensation:

\* Individual Recipient:

[Submit](#) [Cancel](#)

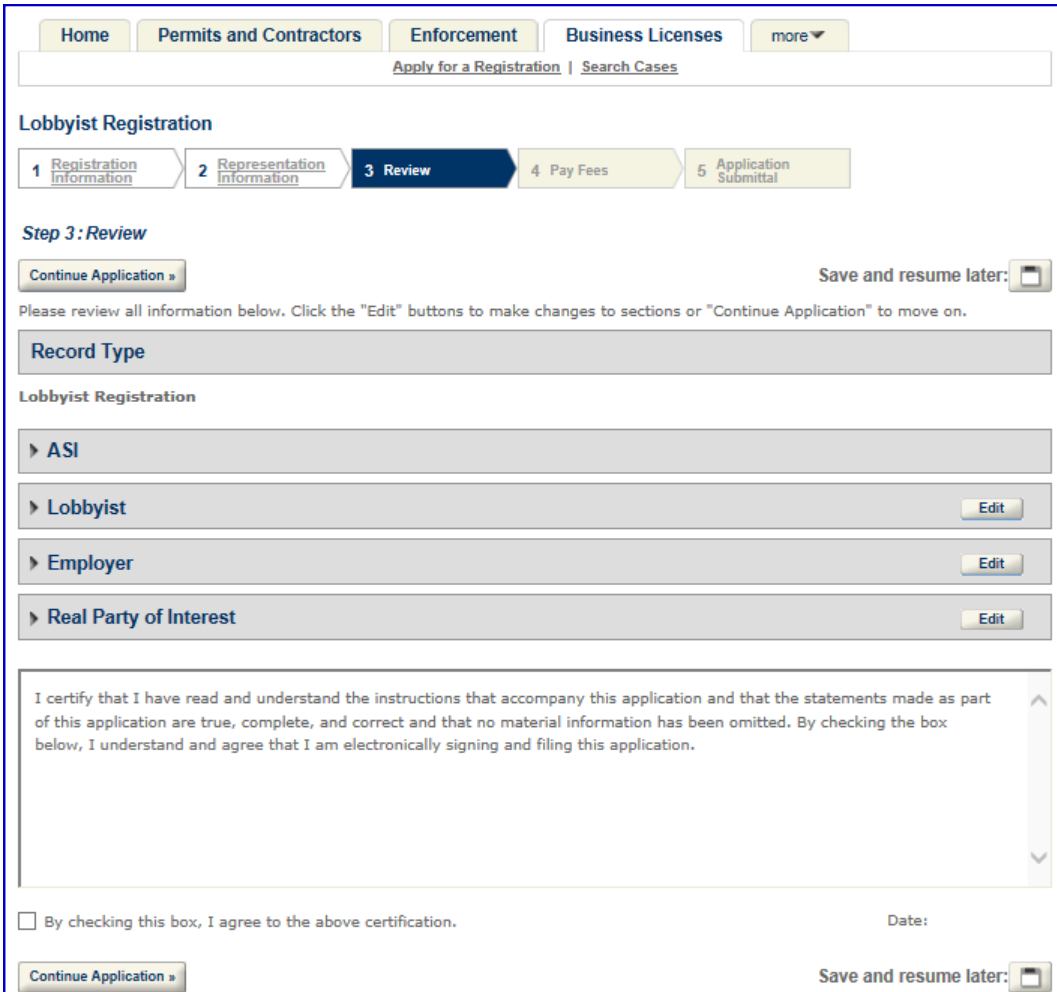
# CREATING THE LOBBYIST REGISTRATION

## 4. Reviewing the submittal

This next screen provides a summary of the overall registration.

Please review the information entered.

Once you have reviewed your application, and read the disclaimer, check the box at the bottom and click the button for 'Continue Application.'



The screenshot shows the 'Lobbyist Registration' process at Step 3: Review. The navigation bar includes 'Home', 'Permits and Contractors', 'Enforcement', 'Business Licenses', and a 'more' dropdown. Below the navigation bar are links for 'Apply for a Registration' and 'Search Cases'. The registration progress is shown as a sequence of five steps: 1. Registration Information, 2. Representation Information, 3. Review (highlighted in dark blue), 4. Pay Fees, and 5. Application Submittal. The 'Continue Application' button is visible on the left, and a 'Save and resume later' option with a floppy disk icon is on the right. A message instructs the user to review all information and click 'Edit' for changes or 'Continue Application' to proceed. The main content area is titled 'Record Type' and 'Lobbyist Registration', listing categories: ASI, Lobbyist (with an 'Edit' button), Employer (with an 'Edit' button), and Real Party of Interest (with an 'Edit' button). A large text box contains a certification statement: 'I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.' Below this text box is a checkbox labeled 'By checking this box, I agree to the above certification.' and a 'Date:' field. At the bottom, there is another 'Continue Application' button and a 'Save and resume later' option with a floppy disk icon.

# CREATING YOUR LOBBYIST REGISTRATION

## 5. Payment

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The fees page outlines the registration fee. When you click the button for 'Check Out', the fee will be added to your shopping cart.

In the shopping cart, you will have two options:

- Click on the button for 'Continue Shopping'  
This will allow you to go back to your list and start another registration. Using the shopping cart, you can pay for multiple registrations at the same time.
- Click the button for 'Check Out'  
This will take you directly to the payment screen where it will ask for your payment information.

Once you click the option to 'Check Out', you will be redirected to the City's third party payment processor's page to pay the registration fee with a credit card or an echeck. Please note the third party processor will assess a processing fee (3.2% for a credit card payment and \$.95 for an echeck).

On the next few pages, you will be prompted to enter in the credit card information or account information for an echeck.

Note: The payment receipt will be sent to the email address entered on this page.

# AMENDING A LOBBYIST REGISTRATION

## 1. Navigate to the registration

After logging into the Portal, click the tab for 'Business Licenses'  
\*You may have to click the tab for 'More' first.

**How To Instructions**  
[Creating an ACA User Account](#)  
[Frequently Asked Questions](#)  
[Instructions for Uploading Documents](#)

Home | Permits and Contractors | Enforcement | **Business Licenses** | more ▾

[Create a Registration](#) | [Search Cases](#)

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**Licenses**

Showing 1-3 of 3 | [Download results](#) | [Add to folder](#) | [Add to cart](#)

<input type="checkbox"/>	<u>Date</u>	<u>Record Number</u>	<u>Record Type</u>	<u>Description</u>	<u>Project Name</u>	<u>Action</u>
<input type="checkbox"/>	09/22/2016	<a href="#">LBY16-000062</a>	Lobbyist Registration		Lobbyist Name	<b>Amendment</b>
<input type="checkbox"/>	09/16/2016	16TMP-022851	Lobbyist Registration			<a href="#">Resume Application</a>
<input type="checkbox"/>	05/10/2016	16TMP-011073	Landlord Application			<a href="#">Resume Application</a>

Select the lobbyist you want to modify by clicking the word 'Amendment' in the right column.

Please note, this option will not be available after the January 15th reporting cut-off.

## 2. Updating your information

After you click the ‘Amendment’ option, you will see the same screens as the initial registration. This will give you the option to edit any currently reported information and to add additional information.

On Step 2, Contact List, you can use the ‘Add New’ button to add any additional Real Parties in Interest.

You can use the ‘Edit’ link on the right side to change any information that has already been entered.

### Lobbyist Amendment

1 Step 1

2 Step 2

3 Review

4 Application Submittal

**Step 2: Step 2 > Page 1** \* indicates a required field.

**Contact List**

To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link.

	Required Contact Type	Minimum
✓	Lobbyist	1
✓	Lobbyist Employer	1
✓	Lobbyist Real Party in Interest	1

✓ **Contact removed successfully.**

Showing 1-3 of 3

Full Name	Business Name	Contact Type	Work Phone	Fax	E-mail	Action
<a href="#">Jane Customer</a>	<a href="#">Company Name</a>	Lobbyist Real Party in Interest	317-327-8978		Email@email.com	<span style="border: 1px solid red; border-radius: 50%; padding: 1px 5px;">Edit</span> <a href="#">Delete</a>
<a href="#">Mary Jones</a>	<a href="#">Lobbying Company</a>	Lobbyist Employer	317-327-8978		Mary@email.com	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">John Lobbyist</a>	<a href="#">Lobbying Firm/Employer</a>	Lobbyist	317-327-8978		John.lobbyist@testemail.com	<a href="#">Edit</a> <a href="#">Delete</a>

Save and resume later:

Click the link for ‘Continue Application’ when all changes have been made to the registration.

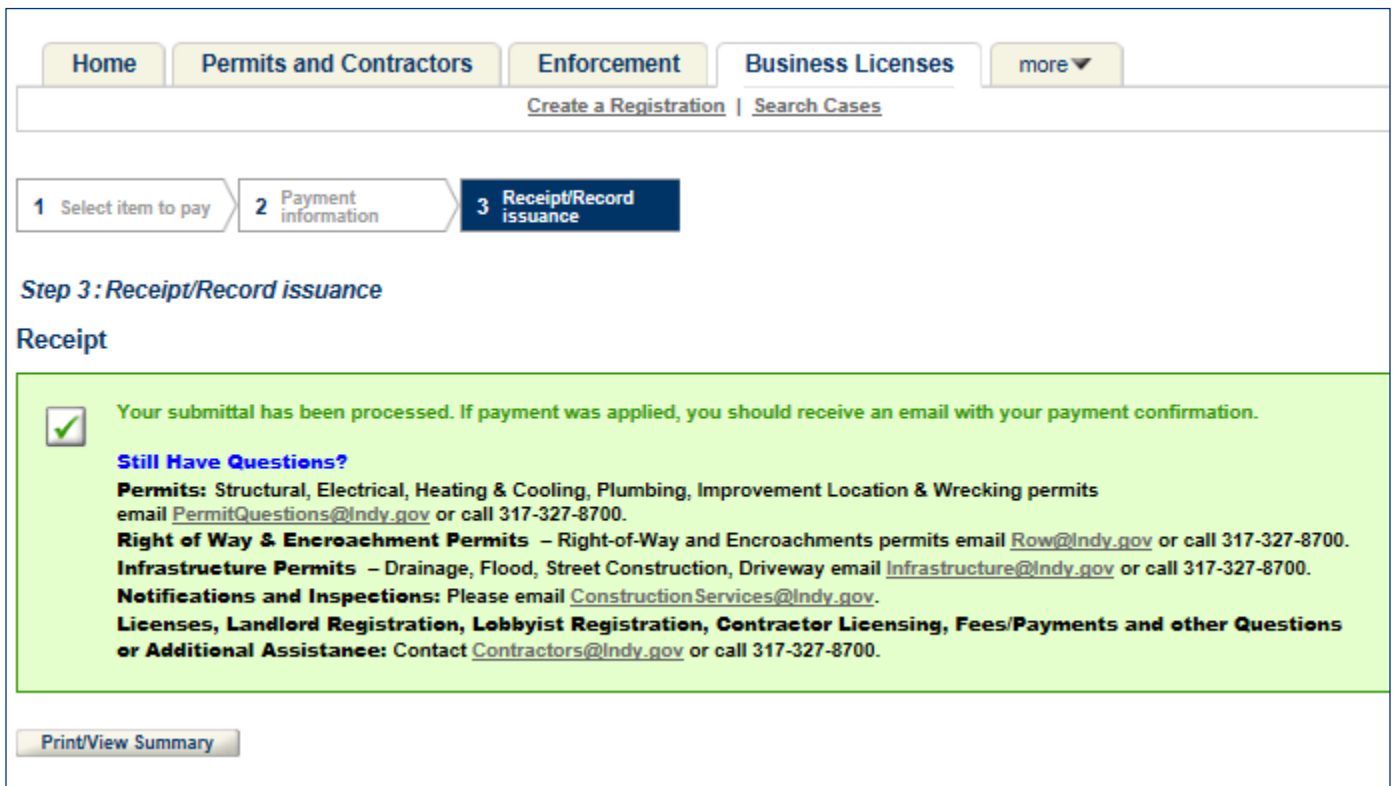
### 3. Review and submittal

Upon continuing the application, you will be shown a summary page where you can review the changes prior to submitting the changes.

If you need to make additional changes, you can use the 'Save and Resume later' option or you will also be able to start over with a new amendment later on.



Once all changes are verified, click the button for 'Continue Application.' This will take you to the confirmation page and apply your changes to the registration record.



There is no limit on the number of times a registration can be amended prior to the January 15th reporting deadline.

# USER HELP AND DBNS CONTACTS

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For all questions related to the lobbyist registration, please contact:

[Department of Business & Neighborhood Services](#)

Phone: 317.327.4316

Email: [licensing@indy.gov](mailto:licensing@indy.gov)

Check registration status online:

<https://permitsandcases.indy.gov/citizenaccess/>