Lobbyist onboarding for Identity and Access Management system

These instructions are also available at:
https://cfb.mn.gov/pdf/quicklinks/lobbyist_onboarding_instructions.pdf

If you have questions or need assistance with the procedures described in this document, contact Jon Peterson at 651-539-1186 or at jon.c.peterson@state.mn.us.

The Board's IAM system is designed to ensure that lobbyists certify their own reports and to provide lobbyists with flexibility and control to give others the right to fill out (but not file) reports or to view, but not fill out or amend reports.

To file reports online, lobbyists will have to establish an account in the Board's IAM system. People to whom a lobbyist grants read-write or view-only rights will also have to establish accounts.

Preconfigured accounts for existing lobbyists
The Board has created preconfigured accounts for all existing lobbyists.

Using your existing MyCFB account
If either a lobbyist or a recipient of delegated reporting rights has established an account to use the MyCFB customization features of the Board's new website, they may use that account for lobbyist reporting purposes as long as the account includes complete name, address, email, and telephone information. If the existing account does not include complete information, the user may complete that information using the Manage Edit Profile feature.

Activating your preconfigured account
Your preconfigured account is activated with the username and password provided in the Board's report filing informational letter.

1. Go to the Campaign Finance Board's website and access the lobbyist disbursement reporting page, which is here:
   https://cfb.mn.gov/reports/#/lobbyist-reports/

2. Click the button that says "Click here to file your lobbyist report online now. The sign in page will open.

3. Enter your temporary user name and password, provided in the lobbyist report filing informational letter from the Board.

4. After signing in, your preconfigured account page will open.

5. **If you already have a MyCFB account set up and you want to use that account for lobbyist reporting:**

Click the button at the top of the form that says “Use my existing account”.
Log in to your existing account.
Continue at step 7.

6. **If you do not have a MyCFB account:**
   You must enter and confirm a new password on your account page and you must provide a password hint, which we can use later to help you remember your password.

7. On your account page, you may change your username to something that is more familiar to you. You may also change other information on this form. It is important that you provide an accurate email address. Your email address will be used for password resets and similar IAM administrative tasks.

8. **Please note:** Although this account is created based on your lobbyist registration information, it is a multiple-purpose account. Changing information in your website account does not result in an amendment to your lobbyist registration.

9. After you make required and optional changes to your account information, click the “Create account” button at the bottom of the form.

10. An email verification form will open. Check your incoming email for a message from the Board containing your verification code. The code is sent to the email address that you submitted with your account information.

11. If you don’t get the validation code in your email box, be sure that your email system recognizes the domain state.mn.us as a trusted sender.

12. You can have the verification code resent if you didn’t get it the first time. If you still have the verification page open, click the “Send new email verification code” button.

13. If you closed the verification page, repeat steps 1 and 2. When you get to the login screen, enter the username and password that you saved when you created your account in step 9. You can’t use the temporary user name and password that the Board provided because it has now been replaced by the user name and password you created.

14. Once you enter the verification code and submit, your account will be fully functional.

15. You can login to your account and begin filing reports or delegating rights right away, or you can come back later by following steps 1 and 2 above and entering your new user name and password.

Filing reports – Lobbyist view

1. Go to the Campaign Finance Board's website and access the lobbyist disbursement reporting page, which is here:
   https://cfb.mn.gov/reports/#/lobbyist-reports/

2. Click the button that says "Click here to file your lobbyist report online now." The sign in page will open. Enter your user name and password.

3. Your lobbyist reporting page will open. You will have two options available (in addition to the options of editing your profile and logging out). You may go to the reporting system or you may delegate rights to another user.

4. To go to the reporting system, click the "Report online" button.

5. On the reporting instructions page, select whether you want to file a report for the current period or amend a report for a previous period.

6. Select the option to file a report for the current period.

7. If you report for more than one association, a list of your associations opens. Click the Select button next to the association for which you want to report.

8. Follow the separate instructions in the Online Reporting System Instructions to complete and save or file the report.

Delegating rights

Lobbyists can delegate two levels of rights to other users: read-write rights and view-only rights.

A user who has read-write rights can fill out, amend, and save reports for you, but cannot certify and file the reports. In all cases, the lobbyist must certify and file the lobbyist's own reports.

A user who has view-only rights can view reports prior to the time they are filed, but cannot change them or certify and file them.

To delegate rights:

1. Go to the Campaign Finance Board's website and access the lobbyist disbursement reporting page, which is here:
   https://cfb.mn.gov/reports/#/lobbyist-reports/

2. Click the button that says "Click here to file your lobbyist report online now. The sign in page will open.

3. Sign in with your user name and password.

4. Click the “Grant reporting rights” button.

5. Fill out the grant form by selecting the association for which you want to grant rights, providing the name of the person getting the rights and the person’s email, and selecting the level of rights you want to grant.

   Note: The person’s email must be correct because it will be used to send the person the invitation to accept rights as well as a verification code that the person must use to accept the rights.

   The Delegate name field is to help you identify who you are granting rights to. Its format is not critical to proper operation of the IAM system.

6. Click the “Add” button.

7. The application will take you back to your lobbyist page. The new rights will be listed in the Pending grants of reporting rights section. Once the other user accepts the rights, you will receive an email notification and the rights will be listed in the Approved grants section.

Accepting delegated rights
A lobbyist who delegates rights to someone else should notify the person that they will receive an email about the delegation and that they should follow the instructions in the email. The lobbyist should also provide the recipient of the rights with a copy of these instructions.

1. As a recipient of delegated rights, you will receive an email from the Board with a verification code and a link to click to accept the delegated rights and create your account.

2. After you visit the link and submit the verification code, the account page will open.

3. **If you already have a MyCFB account set up and you want to use that account for lobbyist reporting:**
   Click the button at the top of the form that says “Use my existing account”.
   Log in to your existing account. If you have not provided complete address, telephone, and email information, you will need to add that before your rights are approved.
   Continue at step 6.

4. **If you do not have a MyCFB account:**
   You must fill out all of the information on the account holder page, including providing complete name, address, telephone, and email information. You must enter and confirm a new password on your account page and you must provide a password hint, which we can use later to help you remember your password.

5. On your account page, you may change your username to something that is more familiar to you. You may also change other information on this form. It is important that you provide an accurate email address. Your email address will be used for password resets and similar IAM administrative tasks.

6. Once you complete the acceptance process, you will have the rights granted.

7. You can log into your newly created or existing account after you accept the delegation and you will see a list of the rights you have. You may do this right after accepting the delegation or any time later.

Filing reports – User with delegated rights

1. Go to the Campaign Finance Board's website and access the lobbyist disbursement reporting page, which is here: https://cfb.mn.gov/reports/#/lobbyist-reports/

2. Click the button that says "Click here to file your lobbyist report online now." The sign in page will open. Enter your user name and password.

3. Your delegated user rights page will open. Select the lobbyist whose reports you wish to view or edit.

4. The reporting page will open. Indicate whether you wish to view or edit the current report or a previously filed report.

5. On the available associations page, select which of the lobbyist's associations is the subject of the report you want to work with.

Follow the separate instructions in the Online Reporting System Instructions to complete and save or file the report.