Quarterly Disclosure Reports

Quarterly reports filed with the Secretary of State disclose receipts and payments in connection with lobbying activity.

Although there are four different forms, the disclosure provisions are similar and, therefore, have been summarized into general guidelines.

Filer	Form
Lobbyist	615
Lobbying Firm	625
Lobbyist Employer	635
$5,000 filer	645

Reporting Period	Deadline
January, February, and March	April 30
April, May, and June	July 31
July, August, and September	October 31
October, November, and December	January 31

A. General Guidelines

- File reports at the end of the month following the end of each calendar quarter. File a report for each calendar quarter, regardless of the level of activity.

  Exception: $5,000 filers only file a report for each calendar quarter in which they spend $5,000 or more to influence legislative or administrative action.

- The reporting period covers the entire calendar quarter. Generally, the cumulative period begins with January 1 of the current biennial legislative session. (Legislative sessions begin in odd-numbered years.)

- For a person who qualifies as a lobbying filer after the first quarter of the current legislative session, the cumulative period begins with the first day of the calendar quarter in which the lobbying entity qualified.

- Retain records and substantiating documents for five years following the date you reported the activities.

B. Allocating Payments

If you engage in lobbying and non-lobbying activities, only report those payments you make or receive that relate to attempting to influence the California State Legislature, Governor, or state administrative agencies.

Ex 5.1 - A lobbying firm received $50,000 from a client to:

- Engage in direct communication with the State Legislature on a pending law enforcement bill, $15,000;
- Lobby the U.S. Congress on a similar bill, $10,000; and
- Provide legal representation in a court case, $25,000.

The lobbying firm reports $15,000 on its Form 625.

In some circumstances, you may need to allocate payments based on the percentage of lobbying activity. If you need to allocate, prepare a written statement that details the percentages that apply for the reporting periods and the allocation method. Retain this written statement with your records. Review your allocation formula on a regular basis.

Memorandum

To: File
From: Accounting Office
Subject: Lobbying Activity

Based on a review of our lobbyist's timesheets for last year, we have determined that during the first three quarters of the prior year, she spent 75 percent of her time on lobbying activities. During the fourth quarter, the rate was 10 percent. Because our activities are fairly consistent from year to year, we have decided to apply the prior year's allocations. We will review our activities each quarter to ensure that no significant changes have occurred. Therefore, for purposes of reporting salary to our lobbyist and other expenses to support the lobbyist, we will allocate as follows:

1st, 2nd, and 3rd Quarters	75%
4th Quarter	10%

On a quarterly basis, we will calculate compensation we pay to other employees who spend 10 percent or more of their compensated time in a calendar month on lobbying activities.

With respect to overhead and operating expenses, a review of our records for the year indicates that during the first, second, and third quarters, lobbying activities accounted for 15 percent of our overhead and operating expenses. During the fourth quarter, the rate was less than one percent. Unless significant changes occur, we will allocate operating and overhead expenses as follows:

1st, 2nd, and 3rd Quarters	15%
4th Quarter	- 0 -

Quick Tip

FPPC Regulation 18614 clarifies when payments to a lobbying firm are reportable as payments for "lobbying services." The regulation addresses legislative-related services, initiative-related services, and litigation services.

C. Legislative or State Agency Administrative Action "Actively" Lobbied

Report only those legislative or administrative actions that were "actively lobbied" during the quarter. An action has been "actively lobbied" if a partner, owner, officer, or employee of the filer, or a lobbying firm with which the filer has contracted, has either engaged in direct communication or been directed by the filer to engage in direct communication with a qualified official for the purpose of influencing the action on behalf of the filer.

When listing state administrative actions, provide the name of the state agency or department. In lieu of bill numbers and regulation numbers, you may provide a specific description of each legislative or administrative action you actively lobbied during the quarter.

Do not list bills or administrative actions that:

- Have died prior to the reporting period;
- You are only monitoring; or
- The lobbying filer has not attempted to influence during the calendar quarter.

D. Activity Expenses

Itemize all activity expenses that you incurred or arranged during the quarter, regardless of whether you actually paid them during the calendar quarter. Once you report an activity expense, you do not report it again.

An itemized activity expense must include the date, name and address of payee, name and position of each reportable person, and a description of the purpose. Disclose the amount of benefit for each reportable person and the total amount of the activity. Do not list employees or other non-reportable individuals.

Lobbying firms must report activity expenses for which a contract lobbyist employer/lobbying coalition reimburses the firm.

Important Notes:

- Do not attach copies of invoices, credit card receipts, or checks to the statement. Keep such documents in your records.
- When a filer shares an activity expense, list the filer's portion in the "Total Amount of Activity" column. Indicate in a note the total cost of the activity expense and that the filer shared the cost.
- Report both the credit card company and the vendor (e.g., restaurant) if you charge an activity expense to a credit card.

- When a lobbyist employer's or lobbying firm's sponsored recipient committee pays for an activity expense, report the expense on the quarterly report as though the filer made it directly. In addition, if a filer's subsidiary pays for an activity expense on the filer's behalf, the filer must report the payment.

E. Campaign Contribution Disclosure

Lobbying filers must disclose contributions totaling $100 or more made in a calendar year to state candidates, elected state officers, their controlled committees (including controlled ballot measure committees, legal defense committees, and officeholder committees), and committees primarily formed to support or oppose such officers or candidates.

Report the date and amount of the contribution, the name of the recipient, and the recipient's committee identification number, if applicable.

If a lobbying filer makes a contribution prior to qualifying, but within the same calendar quarter of registering to lobby, the filer must disclose the contribution.

Do not report contributions to federal candidate committees even if a state officeholder is seeking the office.

If a lobbying filer or the filer's sponsored committee has filed a campaign report (e.g., Form 497, Form 460 or Form 461) with the Secretary of State disclosing a reportable contribution, the contribution does not need to be listed again on the lobbying report. The filer must report the committee's name and identification number on the lobbying report.

Ex 5.2 - In January, Emily Brown made a contribution from her personal funds to State Senator Perez's local committee for mayor. In March, Emily became a lobbyist registered to lobby the Legislature. Because Senator Perez is an elected state officer, Emily must report the contribution on her Form 615 for the first quarter of the year. (As a lobbyist, Emily may not make future contributions to a state or local committee the Senator controls.) Later that year, Emily made a personal contribution to a candidate for Attorney General. This contribution was permissible because Emily does not lobby the Department of Justice. If the contribution was $100 or more, she must report it.

F. Delivering Campaign Contributions

Contributions and the original or a copy of a contribution transmittal letter may not be personally delivered in the State Capitol, in any state office building, or in any office for which the State of California pays the majority of the rent. The only exception to this prohibition is a legislative district office. “Personally delivered” includes delivering a copy or facsimile of a contribution. “Personally delivered” does not include contributions sent through the mail.

Lobbyists must report contributions they make during the calendar quarter that total $100 or more in the calendar year and those that they personally deliver to state candidates or elected state officers, regardless of the source. A lobbyist need not report contributions delivered on behalf of a lobbyist employer or another person unless the lobbyist personally delivers the contribution to the candidate or officeholder or to the candidate/officeholder’s treasurer or agent, in the candidate/officeholder’s presence, and with his or her knowledge.

G. Verification

In the case of the Lobbyist Report, Form 615, the lobbyist must verify that the information provided on the report is true by signing the paper copy. If the lobbyist is not available to sign the report on or before the filing deadline, an agent may sign. The agent should attach a note stating that, as soon as the lobbyist is available, he or she will sign the report and file an amendment.

In the case of the Lobbying Firm Report, Form 625, the individual who is designated on the lobbying firm’s registration statement as the responsible officer must sign and verify the paper copy. If the designated responsible officer is not available to sign the report on or before the filing deadline, another responsible officer or an attorney or certified public accountant may sign the report. The filer should attach a note stating that, as soon as the designated responsible officer is available, he or she will file an amendment.

In the case of the Lobbyist Employer/Lobbying Coalition Report, Form 635, and $5,000 Filer Report, Form 645, a responsible officer,

an attorney, or a certified public accountant who acts as an agent for the entity or organization must sign and verify the report. The same individual is not required to sign all statements.

Amendments to Disclosure Reports

To amend information on a lobbying disclosure report, file an Amendment to Lobbying Disclosure Report, Form 690.

H. Quarterly Reports and Attachments

The following section provides instructions and examples for completing the four quarterly reports: Forms 615, 625, 635, and 645. This section also addresses the most commonly used attachment forms: Forms 640, 635C, and 630. The form to amend the quarterly reports, Form 690, concludes the chapter.

I. Form 615 – Lobbyist Report

A lobbyist must identify his or her name and address and disclose activity expenses and campaign contributions.

All activity expenses the lobbyist arranged, incurred or paid must be itemized during the period in which they occurred regardless of whether they were actually paid during the period. When reporting under the "Name and Official Position of Reportable Person and Amount Benefiting Each," neither the lobbyist nor any other person who is not a reportable person is required to be listed. The total number of persons who benefited must be kept in the lobbyist's records. When reporting under the "Total Amount of Activity," the lobbyist reports the total amount he or she paid, arranged or incurred for the activity, not just the amount benefiting reportable people.

The completed Form 615 must be submitted to the lobbyist's employer or lobbying firm for filing within two weeks following the end of each calendar quarter.

If a lobbyist changes employers in the middle of a quarter, the lobbyist will file two Forms 615: one covering the period with the former employer and one covering the period with the new employer.

LOBBYIST REPORT
(Government Code Section 86116)

PAGE 1 OF 1

FORM 615
2015

REPORT COVERS PERIOD FROM 1/1/20XX THROUGH 3/31/20XX

IMPORTANT: This report is to be completed by the lobbyist and attached to the Report of Lobbying Firm (Form 625) or Report of Lobbyist Employer/ Report of Lobbying Coalition (Form 635), whichever is applicable.

TYPE OR PRINT IN INK

For information required to be provided to you pursuant to the Information Practices Act of 1977, see Information Manual on Lobbying Disclosure Provisions of the Political Reform Act.

FOR OFFICIAL USE ONLY

A

B

NAME: (Last) Marks (First) Jennifer (M.I.) J.

NAME OF FIRM, EMPLOYER, OR COALITION: California Care Providers' Association

BUSINESS ADDRESS: (Number and Street) 819 L Street, Suite 900 (City) Sacramento (State) CA (Zip Code) 95814

TELEPHONE NUMBER: (916) 444-5555

MAILING ADDRESS: (If different than above.)

PART I - ACTIVITY EXPENSES PAID, INCURRED, ARRANGED OR PROVIDED BY THE LOBBYIST (See definitions and instructions on reverse.)

☐ I have reviewed the form and instructions for reporting Activity Expenses and I have nothing to report.

Date	Name and Address of Payee	Name and Official Position of Reportable Persons and Amount Benefiting Each		Description of Consideration	Total Amount of Activity
1/19/XX	Jay's Florist 2300 Watt Avenue, #19 Sacramento, CA 95864	Kris Dillon Daughter of Senator Dillon	$ 9.50	Get Well Gift Basket	$ 9.50

☐ If more space is needed, check box and attach continuation sheets/

PART II - CAMPAIGN CONTRIBUTIONS MADE OR DELIVERED (See instructions on reverse.)
I have reviewed the form and instructions for reporting Campaign Contributions Made or Delivered and:

☒ Part II has been completed and is attached. ☐ I have nothing to report.

VERIFICATION

I have used all reasonable diligence in preparing this Report. I have reviewed the Report and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

C

D

E

F

EXECUTED ON (DATE)	AT (CITY AND STATE)	BY (SIGNATURE OF LOBBYIST)
4/20/XX	Sacramento, CA	[Signature Required]

FPPC Form 615 (10/15)
FPPC Advice Email: advice@fppc.ca.gov
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

J. Form 625 – Report of Lobbying Firm

A lobbying firm will file reports and include lobbyist reports as attachments.

Partners, Owners, Officers, and Employees Who Engaged in Direct Communication

If no partner, owner, officer or employee of the firm qualifies as a lobbyist, list the name and title of each partner, owner, officer or employee of the lobbying firm who, on at least five separate occasions during the quarter, engaged in direct communication with any elected state official, legislative official or agency official for the purpose of influencing legislative or administrative action. Do not include employees whose actions were solely clerical.

REPORT OF LOBBYING FIRM
(Government Code Section 86114)

FORM 625
2015

REPORT COVERS PERIOD FROM 1/1/20XX THROUGH 3/31/20XX

CUMULATIVE PERIOD BEGINNING 1/1/20XX

FOR OFFICIAL USE ONLY

A

B

TYPE OR PRINT IN INK

For information required to be provided to you pursuant to the Information Practices Act of 1977, see Information Manual on Lobbying Disclosure Provisions of the Political Reform Act.

NAME OF LOBBYING FIRM:

Capitol Care, Inc.

BUSINESS ADDRESS: (Number and Street)	(City)	(State)	(Zip Code)	TELEPHONE NUMBER:
1180 Hudson	Sacramento	CA	95822	(916)555-4214

MAILING ADDRESS: (If different than above)

PART I - (Read the instructions on the reverse before completing this section. Then, check one of the boxes below and complete Part I.)

[X] PARTNERS, OWNERS, OFFICERS, OR EMPLOYEES WHOSE "LOBBYIST REPORTS" (FORM 615) ARE ATTACHED TO THIS REPORT OR

[ ] PARTNERS, OWNERS, OFFICERS, OR EMPLOYEES WHO ENGAGED IN DIRECT COMMUNICATION ON AT LEAST FIVE SEPARATE OCCASIONS DURING THE PERIOD

Sean Spencer	
Matt Wilder	

[ ] If more space is needed, check box and attach continuation sheets.

SUMMARY OF PAYMENTS THIS PERIOD

A. GRAND TOTAL PAYMENTS RECEIVED: (From Subtotals in Part II) $ 19,000.00

B. TOTAL ACTIVITY EXPENSES: (From Part III, Section A, 3) $ 0

C. TOTAL PAYMENTS TO OTHER LOBBYING FIRMS: (From Part III, Section B) $ 0

D. GRAND TOTAL PAYMENT MADE: (B + C, above) $ 0

E. CAMPAIGN CONTRIBUTIONS MADE:

[X] None This Period [ ] Part IV Completed and Attached

F. IS THE FIRM A MEMBER OF A LOBBYING COALITION?

[X] No [ ] Yes (complete and attach Form 630)

VERIFICATION

I have used all reasonable diligence in preparing this Report. I have reviewed the Report and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on (Date)	At (City and State)	By (Signature of Responsible Officer)
4/16/XX	Sacramento, CA	[Signature Required]

Name of Responsible Officer (Type or Print)	Title
Sean Spencer	Owner

FPPC Form 625 (10/15)
FPPC Advice Email: advice@fppc.ca.gov
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

NAME OF LOBBYING FIRM: Capitol Care, Inc. PERIOD COVERED: 1/1/20XX - 3/31/20XX

PART I II - PAYMENTS RECEIVED IN CONNECTION WITH LOBBYING ACTIVITY (Amounts may be rounded off to whole dollars. See instructions on reverse.)

Employer's Name, Address and Telephone Number

California Care Providers' Association
819 L Street, Suite 900
Sacramento, CA 95814

Legislative or State Agency Administrative Actions "Actively" Lobbied During the Period. (See instructions on reverse.)

Legislature - AB 12, AB 58, AB 268

Fees and Retainers	Reimbursements of Expenses	Advances or Other Payments (attach explanation)	Total This Period	Cumulative Total to Date
$ 9,000	$	$	$ 9,000	$ 9,000

Employer's Name, Address and Telephone Number

Evercare, Inc.
790 O Street, Suite 190
Sacramento, CA 95814

Legislative or State Agency Administrative Actions "Actively" Lobbied During the Period. (See instructions on reverse.)

AB 268, SB 243

Fees and Retainers	Reimbursements of Expenses	Advances or Other Payments (attach explanation)	Total This Period	Cumulative Total to Date
$ 10,000	$	$	$ 10,000	$ 10,000

Employer's Name, Address and Telephone Number

Legislative or State Agency Administrative Actions "Actively" Lobbied During the Period. (See instructions on reverse.)

Fees and Retainers	Reimbursements of Expenses	Advances or Other Payments (attach explanation)	Total This Period	Cumulative Total to Date
$	$	$	$	$

SUBTOTAL $ 19,000

☐ If more space is needed, check box and attach continuation sheets.

FPPC Form 625 (10/15)
FPPC Advice Email: advice@fppc.ca.gov
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

Payments Received in Connection With Lobbying Activity

List the name, address and telephone number of each lobbyist employer/lobbying coalition on whose behalf the lobbying firm is registered to lobby whether or not the firm has received a payment from the client during the calendar quarter.

If a payment for a client is received from another source (e.g., a public relations firm or administrative services company), the lobbying firm must report both the source and the client.

If a lobbying firm receives a payment in connection with lobbying on behalf of another lobbying firm's client, the lobbying firm receiving the payment must report the other lobbying firm and the client.

Lobbying firms must identify clients that make payments for and direct their lobbying activity. For more information on corporate clients and their subsidiaries, see Chapter 3.

Fees and Retainers

If a lobbying firm provides services other than lobbying (e.g., legal or administrative services) to a client on whose behalf the firm is registered to lobby, the firm only reports payments received for lobbying-related activities.

The firm need not disclose payments for initiative-related or legislative-related services (e.g., bill monitoring) on issues for which the lobbying firm has not been authorized to directly communicate with legislative or agency officials. A lobbying firm, however, must retroactively report payments received for initiative-related and legislative-related services if, within one year of receiving such payments, the firm is authorized to lobby on the same or substantially similar matter. Include the nature of the payment and the date the firm was authorized to lobby. Regulation 18614 (Reportable Lobbying Services) provides guidance on this reporting requirement.

Reimbursement of Expenses

If reimbursement is received for expenses incurred in a prior quarter, indicate in a footnote during which calendar quarter the expenses were incurred.

Payments Made in Connection with Lobbying Activities

Itemize activity expenses that individuals in the lobbying firm, other than registered lobbyists, arranged, incurred, or made on the firm's behalf. The total of these payments is reported in Part III, Section A-1.

If a client later reimburses the lobbying firm, report the reimbursement in Part II.

Do not itemize activity expenses paid or incurred by a salaried lobbyist that were merely reimbursed by or charged to an account the firm paid. The lobbyist itemizes these expenses on his or her Form 615.

Payments Made to Other Lobbying Firms

If the lobbying firm subcontracts with another lobbying firm to lobby on behalf of a client, itemize payments to the subcontracting firm in Part III, Section B.

Answering Your Form 625 Questions

A. Is the responsible officer of the lobbying firm the only person who may sign the Report of Lobbying Firm, Form 625?

Yes. The individual who is designated on the lobbying firm's registration statement must verify and sign the report.

B. Is a lobbying firm required to list lobbying clients that have not made payments to the firm during the calendar quarter covered by the report?

Yes. The lobbying firm must list the name, address and telephone number of each of its clients on whose behalf the lobbying firm is registered to lobby, whether or not the firm has received a payment from the client.

C. Must a lobbying firm report payments from clients contracting only for bill tracking services?

No. Lobbying firms are only required to report payments from persons who pay the firm to engage in direct communication for the purpose of influencing legislative or administrative action.

D. When are fees and retainers reported?

A lobbying firm must report receipt of a client's fee or retainer on the report covering the calendar quarter in which the payment was received. If the payment was for services provided in a prior calendar quarter, indicate on the report the quarter in which services were provided.

K. Form 635 – Report of Lobbyist Employer and Report of Lobbying Coalition

If the organization or entity employs an in-house lobbyist, file Form 615 with Form 635. The Form 640 must be attached to report "Other Payments to Influence Legislative or Administrative Action." In addition, if the lobbyist employer is a member of a lobbying coalition or is a lobbying coalition, Form 630 or Form 635-C is also required to be filed.

Form 635, Part III. Payments Made in Connection With Lobbying Activities

Disclose payments to in-house lobbyists in Part III, Section A. Such payments include:

- Salaries, which include, gross wages paid plus any fringe benefits that are in lieu of wages, such as granting stock options or purchasing annuities. Salary does not include: routine fringe benefits, such as the employer's contributions to a health plan, retirement plan, or payroll taxes.
- Reimbursements of expenses (including activity expenses);
- Advances for expenses or salary; and
- Any other payments made directly to the lobbyist(s).

Important Notes:

- Do not include payments made directly to a vendor for an in-house lobbyist's lobbying expenses (e.g., automobile lease, restaurant, credit card company, or membership club). Report such payments under "Other Payments to Influence," Part III, Section D (2).
- If an in-house lobbyist performs duties other than lobbying, only the portion of his or her salary and expenses allocated to lobbying may be reported. (See Chapter 6 for instructions on how to allocate lobbying expenses.)

☐ **REPORT OF LOBBYIST EMPLOYER**
(Government Code Section 86116)
or
☐ **REPORT OF LOBBYING COALITION**
(2 Cal. Code of Regs. Section 18616.4)

FORM 635

IMPORTANT: Lobbying Coalitions must attach a completed Form 635-C to this Report.

REPORT COVERS PERIOD FROM 1/1/XX THROUGH 3/31/XX

CUMULATIVE PERIOD BEGINNING 1/1/20XX

TYPE OR PRINT IN INK

FOR OFFICIAL USE ONLY

A

B

NAME OF FILER:
California Care Providers' Association

BUSINESS ADDRESS: (Number and Street)	(City)	(State)	(Zip Code)	TELEPHONE NUMBER:
819 L Street, Suite 900	Sacramento	CA	95814	(916)444-5555

PART I - LEGISLATIVE OR STATE AGENCY ADMINISTRATIVE ACTIONS ACTIVELY LOBBIED DURING THE PERIOD
(See instructions on reverse.)

AB 12, AB 58, AB 268, SB 243, SB 441, CCR Div. 13, Title 16 1337.5

☐ If more space is needed, check box and attach continuation sheets.

SUMMARY OF PAYMENTS THIS PERIOD

A. Total Payments to In-House Employee Lobbyists (Part III, Section A, Column 1) $	62,021.04
B. Total Payments to Lobbying Firms (Part III, Section B, Column 4) $	9,000.00
C. Total Activity Expenses (Part III, Section C) $	12,616.80
D. Total Other Payments to Influence (Part III, Section D) $	32,919.12
GRAND TOTAL (A + B + C + D above) $	116,556.96
E. Total Payments in Connection with PUC Activities (Part III, Section E) $	0

F. Campaign Contributions: ☒ Part IV completed and attached ☐ No campaign contributions made this period

VERIFICATION

I have used all reasonable diligence in preparing this Report. I have reviewed the Report and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.
I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on (Date)	At (City and State)	By (Signature of Employer or Responsible Officer)
4/20/XX	Sacramento, CA	[Signature Required]

Name of Employer or Responsible Officer (Type or Print)	Title
James S. Jennings	Chief Operating Officer

CALIFORNIA FORM **635**

PAGE 2 OF 5

NAME OF FILER: California Care Providers' Association PERIOD COVERED: 1/1/20XX - 3/31/20XX

PART II - PARTNERS, OWNERS, AND EMPLOYEES WHOSE "LOBBYIST REPORTS" (FORM 615) ARE ATTACHED TO THIS REPORT (See instructions on reverse.)

Name and Title	Name and Title
Jennifer Marks, Associate Director	
Sue Davis, Vice President	

☐ If more space is needed, check box and attach continuation sheets.

PART III - PAYMENTS MADE IN CONNECTION WITH LOBBYING ACTIVITIES

A. PAYMENTS TO IN-HOUSE EMPLOYEE LOBBYISTS (See instructions on reverse. Also enter the Amount This Period (Column 1) on Line A of the Summary of Payments section on page 1.)	(1) Amount This Period	(2) Cumulative Total To Date
	$ 62,021.04	$ 62,021.04

B. PAYMENTS TO LOBBYING FIRMS (Including Individual Contract Lobbyists)

Name and Address of Lobbying Firm/Independent Contractor	(1) Fees & Retainers	(2) Reimbursements of Expenses	(3) Advances or Other Payments (attach explanation)	(4) Total This Period	(5) Cumulative Total to Date
Capitol Care, Inc., 1180 Hudson, Sacramento, CA 95822	$9,000	0	0	$9,000	$9,000
☐ If more space is needed, check box and attach continuation sheets.	TOTAL THIS PERIOD (Column 4) Also enter the total of Column 4 on Line B of the Summary of Payments section on page 1.			$ 9,000	

CALIFORNIA FORM 635

NAME OF FILER: California Care Providers' Association

PERIOD COVERED: 1/1/20XX - 3/31/20XX

C. *ACTIVITY EXPENSES* (See instructions on reverse.)

Date	Name and Address of Payee	Name and Official Position of Reportable Persons and Amount Benefiting Each		Description of Consideration	Total Amount of Activity
2/5/XX	Cuenos 212 Front Street San Diego, CA 92109	Martha Dillon Senator	$ 23.19	Breakfast	$ 208.92
2/5/XX	Cuneos 212 Front Street San Diego, CA 92109	Jackson Wachs Chief of Staff, Senator Dillon	18.30	Breakfast	
2/8/XX	Central Street Grille 419 L Street Sacramento, CA 95814	Douglas Martin Senator	22.40	Dinner	312.19
2/8/XX	Central Street Grille 419 L Street Sacramento, CA 95814	Kiyo Fong Chief of Staff, Senator Martin	19.18	Dinner	
3/31/XX	Julio Fernandez 819 L Street, Suite 900 Sacramento, CA 95814	Karen Fernandez Counsel Department of Aging	0	Salary and Expenses Paid to Spouse	10,225,50

☐ If more space is needed, check box and attach continuation sheets.

TOTAL SECTION C (Activity Expenses) Also enter the total of Section C on Line C of the Summary of Payments section on page 1. $ 12,616.80

D. *OTHER PAYMENTS TO INFLUENCE LEGISLATIVE OR ADMINISTRATIVE ACTION*

1. PAYMENTS TO LOBBYING COALITIONS (NOTE: You must attach a completed Form 630 to this Report.) $ 3,000

2. OTHER PAYMENTS (NOTE: You must attach a completed Form 640 to this Report.) $ 29,919.12

TOTAL SECTION D (1 + 2) Also enter the total of Section D on Line D of the Summary of Payments section on page 1. $32,919.12

E. *PAYMENTS IN CONNECTION WITH ADMINISTRATIVE TESTIMONY IN RATEMAKING PROCEEDINGS BEFORE THE CALIFORNIA PUBLIC UTILITIES COMMISSION* Also, enter the total of Section E on Line E of the Summary of Payments section on page 1. (See instructions on reverse.) $ 0

PAGE 4 OF 5

CALIFORNIA FORM 635

NAME OF FILER: California Care Providers' Association

PERIOD COVERED: 1/1/20XX - 3/31/XX

C. *ACTIVITY EXPENSES* (See instructions on reverse.)

Date	Name and Address of Payee	Name and Official Position of Reportable Persons and Amount Benefiting Each		Description of Consideration	Total Amount of Activity
2/10/XX	Sacramento Convention Center, 1400 J Street, Sacramento, CA 95814	Senator Smith	$ 40	Reception	$ 1,500
		Assemblymember Reyes	40	Reception	
		Susan West External Affairs Director Attorney General	40	Reception	
	Note: The total cost of the event was $3,000 - this filer paid 50%.				

☐ If more space is needed, check box and attach continuation sheets.

TOTAL SECTION C (Activity Expenses)
Also enter the total of Section C on Line C of the Summary of Payments section on page 1.

$ 1,500

Lobbyist employers must itemize costs associated with events that are activity expenses (e.g., a legislative reception). If a lobbyist employer shares the costs of a reception or similar event, list the lobbyist employer's portion in the total amount of activity column. Indicate in a note the total cost of the activity and that others shared the cost. (See Chapter 4 for more information on activity expenses.)

CALIFORNIA FORM **635**

NAME OF FILER: California Care Providers' Association

PERIOD COVERED: 1/1/20XX - 3/31/20XX

PART IV - CAMPAIGN CONTRIBUTIONS MADE (Monetary and non-monetary campaign contributions of $100 or more made to or on behalf of state candidates, elected state officers and any of their controlled committees, or committees supporting such candidates or officers must be reported in A or B below.)

A. If the contributions made by you during the period covered by this report, or by a committee you sponsor, are contained in a campaign disclosure statement which is on file with the Secretary of State, report the name of the committee and its identification number, if any, below.

Name of Major Donor or Recipient Committee Which Has Filed A Campaign Disclosure Statement: California Care Providers' Association Political Action Committee

Identification Number if Recipient Committee: 742117

B. Contributions of $100 or more which have not been reported on a campaign disclosure statement, including contributions made by an organization's sponsored committee, must be itemized below.

Date	Name of Recipient	I.D. Number if Committee	Amount
			$

☐ If more space is needed, check box and attach continuation sheets.

NOTE: Disclosure in this report does not relieve a filer of any obligation to file the campaign disclosure statements required by Gov. Code Section 84200, et seq.

Part III Section B. Payments to Lobbying Firms (Including Individual Contract Lobbyists)

Report payments to lobbying firms. If a lobbying firm provides services other than lobbying, only report payments for lobbying-related activities. List each lobbying firm authorized to lobby on behalf of the lobbyist employer/coalition, even if no payments to the firm have been made during the period this report covers.

Part III Section C. Activity Expenses

Lobbyist employers must report activity expenses they make, as well as activity expenses their sponsored campaign committees pay.

Do not list activity expenses paid or incurred by a salaried lobbyist that were merely reimbursed by or charged to an account the lobbyist employer/lobbying coalition pays. Itemize such activity expenses on the lobbyist's Form 615 and report as an overhead expense on the Form 635.

Ex 5.3 - The PAC for the California Dairy Association, a lobbyist employer, pays for a dinner for a legislative official and his spouse. The PAC reports the payment as an expenditure and the California Dairy Association reports the payment as an activity expense on its Form 635.

The lobbyist employer's disclosure of reimbursements for expenses incurred by an in-house lobbyist depends on how the expenses were paid:

- If the lobbyist employer makes the payment directly to the lobbyist, report the amount on the Form 635 in Part III, Section A.
- If the lobbyist charges an expense to an account for which the lobbyist employer makes a direct payment to the credit card company or vendor, report the amount on the Form 635 in Part III, Section D.

Ex 5.4 - At a lunch meeting with a Social Services Department official, in-house lobbyist Ron McPherson charged sandwiches and beverages on his employer's credit card. Ron must itemize the activity expense on his Form 615. His employer must include the payment in Part III Section D under "Other Payments" on the Form 635.

Part III Section D. Attach Form 640, Other Payments to Influence Legislative or Administrative Action

- All filers must attach a Form 640.
- If payments were made to a lobbying coalition, a Form 630 must also be attached.

Part III Section E. Payments in Connection with Administrative Testimony in Ratemaking Proceedings Before the California Public Utilities Commission

Report payments made in connection with administrative testimony in PUC ratemaking or quasi-legislative proceedings, unless the payments are made to a lobbyist or lobbying firm.

Reporting payments made in connection with administrative testimony in PUC regulatory proceedings is limited to the following:

- Compensation paid to all attorneys (excluding lobbyists) for time spent appearing as counsel and preparing the oral testimony.
- Compensation paid to all witnesses (excluding lobbyists) for time spent testifying and preparing to testify.
- Payments made for "grass-roots" lobbying, such as soliciting others to urge the PUC to act in a certain way.

Ex 5.6 - Tony Malone is the General Counsel and lobbyist for the Alliance for Public Schools. On one day, he incurred travel expenses to attend a meeting during which he spent two hours on legislative business and two hours on non-legislative business. He charged the expenses to his employer's credit card. For reporting purposes, he may allocate the travel expenses (transportation, lodging and subsistence) between the legislative and non-legislative activities.

Ex 5.7 - The Alliance for Public Schools sends a special mailing asking recipients to call their legislators and request a "yes" vote on Assembly Bill 1010. Also included in the mailing is non-legislative material. For reporting purposes, any reasonable allocation method made in good faith may be used to determine the amount reported under "Other Payments."

No other in-house or overhead expenses in connection with administrative testimony before the PUC are reportable. Payments, however, that are connected with direct communication outside the regulatory proceedings may be reportable.

Answering Your Form 635 Questions

A. Who may sign the Report of Lobbyist Employer, Form 635?

A responsible officer of the lobbyist employer/lobbying coalition or an attorney or certified public accountant who acts as an agent of the lobbyist employer/lobbying coalition may sign the Form 635.

B. Must a lobbyist employer/lobbying coalition itemize the activity expenses incurred or paid by its lobbyist?

No. But if a lobbyist arranges any payment made by a lobbyist employer/lobbying coalition that benefits a reportable person, both the employer and the lobbyist must itemize the expense.

C. How does a lobbyist employer/lobbying coalition retroactively report payments made to a lobbying firm for legislative-related or initiative-related services when the payments are made 12 months before the lobbying firm is authorized to lobby on behalf of the lobbyist employer/lobbying coalition?

On the first report covering the period the lobbying firm is authorized to lobby, the lobbyist employer must note in Part III, Section B the date the lobbying firm was authorized to lobby and identify the nature of the previous payments (e.g., legislative-related or initiative-related services). If applicable, a note must indicate that the amount has been deducted from Section D, "Other Payments."

Ex 5.8 - In-house lobbyist Sally Jones personally invites a legislator to attend a breakfast meeting with her supervisor. Sally will not be attending the meeting. For disclosure purposes, because Sally arranged for the event, she must disclose the activity expense on her Form 615. In addition, the activity expense must be itemized on her employer's Form 635. Because Sally arranged the meeting, the gift (e.g., food and beverage) may not exceed $10.

D. If a lobbyist employer hires a lobbying firm and that lobbying firm subcontracts with another lobbying firm, does the lobbyist employer report the second lobbying firm on the Form 635?

No.

E. If a lobbyist employer/lobbying coalition terminates all lobbying activity in the middle of a quarter, does the period covered on the statement continue through the end of the quarter?

No. The period covered on that statement ends on the date the lobbyist employer/lobbying coalition terminates all lobbying activity (e.g. if the, lobbyist employer terminates on 2/15/XX. The period covered would be 1/1/XX through 2/15/XX.)

Attachment Form 640
(Attachment to Form 635 or Form 645)

CALIFORNIA FORM **640**

PAGE 1 OF 1

NAME OF FILER: California Care Providers' Association PERIOD COVERED: 1/1/XX -3/31/XX

For Use By: A state or local government agency that qualifies as a lobbyist employer or a $5,000 filer. Refer to the instructions on the cover page before completing this attachment.

Summary of Other Payments to Influence Legislative or Administrative Action:

1. Total payments for overhead expenses related to lobbying activity. Report as a lump sum.	$ 2,000
2. Total payments to Lobbying Coalitions. Report as a lump sum. (Form 630 must be attached)	$ 0
3. Total payments of less than $250 or $2,500, as applicable, during the calendar quarter for lobbying activity (excluding overhead). Report as a lump sum.	$ 10,500
4. Total payments of more than $250 or $2,500, as applicable, during the calendar quarter for lobbying activity (excluding overhead). Itemize payments below.	$ 9,000
5. Grand total of "Other Payments to Influence Legislative or Administrative Action." Also enter this total on the appropriate line of the Summary of Payments section on Page 1 of Form 635 or Form 645.	$ 21,500

Government agencies must itemize payments of $250 or more, and all other lobbyist employers and $5,000 filers must itemize payments of $2,500 or more, made during the quarter for lobbying activity. Provide the payment code, name and address of the payee, the amount paid during the quarter, and the cumulative amount paid to the payee since January 1 of the biennial legislative session covered by the report.

State and local government agencies also must itemize dues or similar payments of $250 or more made to an organization that makes expenditures equal to 10% of its total expenditures or $15,000 or more in a calendar quarter to influence legislative or administrative action.

Payment Code, Name & Address of Payee	Amount This Quarter	Cumulative Amount Since January 1
[S] - Jordan Woods, Elysium Technologies 152 Broad Street Sacramento, CA 95814	$ 2,500	$ 2,500
[V] - Ultimate Events, 800 Capitol Mall, Suite 10, Sacramento, CA 95814	$ 6,500	$ 10,500
	$	$
Subtotal of all payments itemized above	$ 9,000	

☐ If more space is needed, check box and attach continuation sheets.

L. Form 640 – Other Payments to Influence Legislative or Administrative Action

Lobbyist employers and $5,000 filers, including state and local government agencies that qualify as these types of filers, must attach Form 640 to their quarterly lobbying reports (Form 635 or 645) to disclose “other payments to influence legislative or administrative action.”

Such payments include:

- Payments for overhead expenses related to lobbying activity. "Overhead" includes payments for goods or services necessary to maintain an office, such as rent, utilities, janitorial services, etc. These payments are reported as a lump sum.
- Payments to lobbying coalitions. These payments are reported as a lump sum and a Form 630 must be attached.
- "Other payments to influence," which includes payments for or in connection with:
  - Support or assistance of lobbyists;
  - Direct communication with a legislative, agency, or elective state official for the primary purpose of influencing legislative or administrative action;
  - All other expenses that would not have been incurred but for the filer's activities to influence or attempt to influence legislative or administrative action; (Regulation 18616(f)(1)(B)(iii)) and
  - Soliciting or urging persons other than the filer or the filer's employees to enter into direct communication with a legislative, agency, or elective state official for the primary purpose of influencing legislative or administrative action. (Regulation 18616(a)(4).)

State and local government agencies. Must itemize other payments of $250 or more made during the calendar quarter. State and local government agencies also must itemize dues or similar payments of $250 or more to an organization that makes expenditures equal to 10% of its total expenditures or $15,000 or more in a calendar quarter to influence legislative or administrative action.

All other lobbyist employers and $5,000 filers. Must itemize other payments of $2,500 or more made during the calendar quarter.

Payments of less than $250 or $2,500, as applicable, are reported as a lump sum.

Exception:

- Do not report compensation paid to an employee whose duties are solely clerical, or are limited to the compilation of data or statistics.

Quick Tip

Dues or similar payments made by government agencies to organizations need not be counted for purposes of determining if the agency **qualifies** as a lobbyist employer/lobbying coalition or a $5,000 filer unless the organization assesses dues or other payments specifically for lobbying activities.

Quick Tip

Form 640 should not include payments to salaried lobbyists, lobbying firms, activity expenses, or payments made in connection with PUC lobbying activity.

Important Note:

A lobbyist employer must retroactively disclose in Part III, Section B payments made to a lobbying firm for initiative-related or legislative-related services (e.g. bill monitoring, or drafting statutes) if, within one year of making such payments, the lobbyist employer authorizes the lobbying firm to lobby on the same or substantially the same matter. If the lobbyist employer had previously reported the payments as "Other Payments," the payments must be deducted from Part III Section D and a note provided to indicate the amount of the deduction.

Reporting and Itemization

Form 640 is submitted as an attachment with the Form 635 or Form 645. For itemized payments, the filer is required to disclose:

- The name and business address of the payee;
- The total payments made during the reporting period;
- The cumulative amount paid during the calendar year;* and
- A payment code to describe the primary purpose of the payment.

*The rules requiring more detailed disclosure are effective July 1, 2016, so for reports filed in 2016, the cumulative amount paid during the calendar year only needs to include amounts paid on or after July 1, 2016. All reports filed after 2016 must include payments from January 1 of that calendar year in the cumulative amount.

Use of Payment Codes

A filer must use a specified payment code [in brackets] to identify the **primary purpose** of the itemized payment of $250 or more made by state and local government agencies, or payments of $2,500 or more made by all other lobbyist employers and $5,000 filers. The filer must use the code that best identifies the main activity or purpose for the expenditure.

Examples:

- A lobbyist employer paid an advertising firm $100,000 for television, newspaper, and electronic commercials urging the public to contact their legislator to support a crime bill. A portion of that fee ($10,000) was for consulting fees for public affairs strategy and advocacy. The total expenditure amount would be reported using the payment code [A] for an "advertising" expenditure as the primary purpose of the payment was for commercial spots.
- A $5,000 filer paid a political consulting firm $200,000 for polling and public opinion research regarding a minimum wage bill, witha small portion of the fee ($20,000) for political advocacy and strategy. The filer would use the payment code [R] indicating the primary purpose of the expenditure was "research."

The payment codes are categorized as follows:

i. **Salary – [S]** Compensation of employees, other than lobbyists, who are engaged for 10% or more of their time in one month in activities related to lobbying, such as engaging in direct communication with a legislative, agency, or elective official, or providing analysis, research or support or assistance to a lobbyist and expenses of employees related to influencing legislative or administrative action;

ii. **Lobbyist Expenses – [E]** Expenses incurred by a lobbyist and paid directly by the filer, or expenses incurred by the filer for goods or services used by a lobbyist or used to support or assist a lobbyist in connection with his or her activities as a lobbyist;

iii **Legislative - Related Services – [L]** Legislative-related services performed by a lobbying firm in the absence of express or implied authorization to engage in direct communication related to researching, monitoring, analyzing or drafting statutes, or recommending strategy, providing advice, or similar services concerning pending or proposed legislative or administrative action as required under Regulation 18614(b)(2);

iv. **Consultants & Government Relations – [C]** Contracts for economic consideration with a business entity or individual, other than a lobbying firm or lobbyist, to provide governmental consulting, advocacy, or strategy;

v. **Public Affairs – [P]** Coalition building, grassroots campaigns and public policy initiatives including news releases, media campaigns, social media messaging, publicity, literature and mailings, canvassing, and special events;

vi. **Advertising – [A]** Including billboards, print, radio, television, text, email and other electronic advertising;

vii. **Research – [R]** Including feasibility studies, analysis, polling, and public opinion research;

viii. **Lobbying Events – [V]** Including event planning, rentals, equipment, and transportation for members of organizations or the public to meet public officials, hold rallies or attend hearings to influence legislative or administrative action;

ix. **Other – [O]** For all other payments not covered by one of the above listed categories, including dues or similar payments made by state and local government agencies.

Answering Your Form 640 Questions

A. A lobbyist employer owns its own building. How does it have to report the amount of overhead expenses related to the operation of the building on the Form 640?

The filer should only report costs of business overhead related to lobbying activity. This amount is reported as a lump sum along with other overhead expenses related to lobbying activity such as office supplies, rent, and legislative subscription services on line 1 of the Form 640. Regular business overhead not related to lobbying activities that would continue to be incurred in substantially similar amounts regardless of the filer's activities to influence legislative or administrative action is not required to be reported on the Form 640.

B. When employees work from a home office, must the business disclose the employee's personal residence on the Form 640 when reporting salary payments of 10% or more to the employee?

The employer may its business address instead of the employee's home address.

C. A nonprofit membership organization that is lobbyist employer engages in lobbying-related and non-lobbying activities at a meeting. For instance, it provides its members with an update of bills it is lobbying and its staff also directly asks its members to contact legislators or to give testimony. How is staff time related to the meeting reported for purposes of the Form 640?

If staff is involved soliciting or urging persons other than the lobbyist employer's employees to enter into direct communication with a legislative, agency or elective state official to influence legislative or administrative action, the employee's time at the meeting counts toward the 10% threshold for reporting employee compensation in a calendar month in connection with other payments to influence legislative or administrative action.

D. Is the 10% threshold for reporting employee compensation related to other payments to influence based on a salaried employee's required work hours or the salaried employee's actual hours worked? For example, if a salaried employee is required to work 175 hours in a calendar month, but the employee actually works 200 hours in one month, how is the 10% threshold determined?

It is recommended that monthly - required work hours be used, rather than the actual hours worked.

E. Does an employee's travel time to and from an event where the employee engages in influencing legislative or administrative action count toward the 10% threshold for reporting the employee's salary related to other payments to influence?

Travel time counts towards whether an employee spends 10% or more of his or her time in a calendar month influencing legislative or administrative action. For example, an employee is providing testimony at a Legislative hearing, and the employee must travel to Sacramento to present his or her testimony. The employee must count the time preparing for the hearing, time spent traveling to and from the event to deliver the testimony, time waiting to offer the testimony, and the time actually delivering the testimony.

F. Is the cumulative total required to include both itemized and non-itemized payments made to a vendor during a calendar year?

The cumulative total is required to only include previously itemized amounts. For example, if a vendor is paid $150 in Q3 (reported as part of the non-itemized lump sum), and $3,000 in Q4, the report would show cumulative payments to the vendor of $3,000 (only the itemized amount).

G. What code may a filer use for a payment if there are large expenditures to the same vendor for two purposes, for example, $15,000 for advertising [A], and $10,000 for lobbying events [V]?

You may use the code that reflects the primary purpose (largest portion) of the payment [A]: Q1 - [A] The Public Affairs People, $25,000 (this quarter); $25,000 (cumulative since 1/1)

or you may use two separate codes to describe this payment: Q1 - [A] The Public Affairs People, $15,000 (this quarter); $25,000 (cumulative since 1/1)

Q1 - [V] The Public Affairs People, $10,000 (this quarter); $25,000 (cumulative since 1/1

Note: this method of apportioning the payment *cannot be used to avoid itemizing payments to a vendor* once the $2,500 reporting threshold per vendor is reached in the calendar quarter. (EX: $2,500 to a vendor cannot be broken out into $1,000 payment for events; and $1,500 for advertising to avoid disclosure).

H. Are dues payments made by a person, other than a state or local government agency, for membership in a bona fide association, such as a labor or trade association, considered to be payments to influence, legislative or administrative action?

No.

M. Lobbying Coalitions – Related Attachments

Form 635-C – Payments Received by Lobbying Coalitions

A lobbying coalition must include a Form 635-C with its quarterly Form 635 to disclose payments it received from its members. The coalition must identify each member on each quarterly report even if the member has not made a payment during the quarter. If a member has not made a payment during a quarter, enter zero and the cumulative amount received since January 1 of the biennial legislative session.

ATTACHMENT FORM 635-C
PAYMENTS RECEIVED BY LOBBYING COALITIONS

(Attachment to Form 635)

FORM 635-C
2015

Period Covered 1/1/20XX Through 3/31/20XX

Cumulative Period Beginning 1/1/20XX

Name of Lobbying Coalition:

Coalition of Healthcare Providers

Name and Business Address of Coalition Members	Amount Received This Period	Cumulative Amount Received Since January 1 of Biennial Legislative Session
California Care Providers' Association 819 L Street, Suite 900 Sacramento, CA 95814	$ 3,000	$ 3,000

Form 630 – Payments Made To Lobbying Coalitions

A lobbyist employer that is a member of a lobbying coalition must include a Form 630 with its quarterly Form 635 to disclose payments made to the coalition. File reports for each calendar quarter even if no payment was made.

ATTACHMENT FORM 630
PAYMENTS MADE TO LOBBYING COALITIONS

(Attachment to Form 625 or 635)

FORM 630
2015

Period Covered 1/1/20XX Through 3/31/20XX

Cumulative Period Beginning 1/1/20XX

Name of Lobbying Firm or Lobbyist Employer Making Payments:

California Care Providers' Association

Name and Business Address of Lobbying Coalition Receiving Payments	Amount Received This Period	Cumulative Amount Paid Since January 1 of Biennial Legislative Session
Coalition of Health Care Providers 3895 T Street, Suite 250 Sacramento, CA 95815	$ 3,000	$ 3,000

N. Form 645 – Report of Person Spending $5,000 or More to Influence Legislative or Administrative Action

A person who does not employ a lobbyist or contract with a lobbying firm but makes payments totaling $5,000 or more in a calendar quarter to influence legislative or administrative action must report activity for that calendar quarter on Form 645. The Form 640 must be attached to disclose Other Payments to Influence Legislative or Administrative Action. The person need not file Form 645 for any quarter in which the person does not spend $5,000. Do not include activity expenses to determine the $5,000 threshold.

Ex 5.9 - The Alliance of Healthcare Providers paid $7,500 for newspaper advertisements urging voters to call their legislator for a 'yes' vote on AB 557. The Alliance is not a lobbyist employer. Although the Alliance is not a lobbyist employer, it must file Form 645 and report $7,500 under "Other Payments to Influence Legislative or Administrative Action."

REPORT OF PERSON SPENDING $5,000 OR MORE TO INFLUENCE LEGISLATIVE OR ADMINISTRATIVE ACTION

(Government Code Section 86116)

FORM 645

PAGE 1 OF 2

REPORT COVERS PERIOD FROM 1/1/20XX THROUGH 3/31/20XX

CUMULATIVE PERIOD BEGINNING 1/1/20XX

TYPE OR PRINT IN INK

FOR OFFICIAL USE ONLY

A

B

NAME OF FILER:

XYZ Company

BUSINESS ADDRESS: (Number and Street)	(City)	(State)	(Zip Code)	TELEPHONE NUMBER:
1234 State Street	Sacramento	CA	95814	(916) 555-1212

PART I - LEGISLATIVE OR STATE AGENCY ADMINISTRATIVE ACTIONS ACTIVELY LOBBIED DURING THE PERIOD
(See instructions on reverse.)

AB 234

☐ If more space is needed, check box and attach continuation sheets.

SUMMARY OF PAYMENTS THIS PERIOD

A. Total Activity Expenses (Part II, Section A)	$ 0
B. Total Other Payments to Influence (Part II, Section B)	$ 14,506.04
Total (A + B above)	$ 14,506.04
C. Total Payments in Connection with PUC Activities (Part II, Section C)	$ 0

CAMPAIGN CONTRIBUTIONS: ☐ Part III completed and attached ☒ No campaign contributions made this period

VERIFICATION

I have used all reasonable diligence in preparing this Report. I have reviewed the Report and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on (Date)	At (City and State)	By (Signature of Filer or Responsible Officer)
4/30/20XX	Sacramento, CA	[Signature Required]
Name of Filer or Responsible Officer (Type or Print)		Title
Jane Smith		Executive Director

PAGE 2 OF 2

CALIFORNIA FORM 645

NAME OF FILER: XYZ Company

PERIOD COVERED: 1/1/20XX - 3/31/20XX

PART II - PAYMENTS MADE THIS PERIOD

A. ACTIVITY EXPENSES (See instructions on reverse.)

Date	Name and Address of Payee	Name and Official Position of Reportable Persons and Amount Benefiting Each		Description of Consideration	Total Amount of Activity
			$		$

☐ If more space is needed, check box and attach continuation sheets.

TOTAL SECTION A (Activity Expenses). Also enter the total of Section A on Line A of the Summary of Payments section on page 1. $

B. OTHER PAYMENTS TO INFLUENCE LEGISLATIVE OR ADMINISTRATIVE ACTION

1. PAYMENTS TO LOBBYING COALITIONS (NOTE: Attach Form 630.) $ 0

2. OTHER PAYMENTS (NOTE: Attach Form 640.) $ 14,506.04

TOTAL SECTION B (1 + 2). Also enter the total of Section B on Line B of the Summary of Payments section on page 1. $ 14,506.04

C. PAYMENTS IN CONNECTION WITH ADMINISTRATIVE TESTIMONY IN RATEMAKING PROCEEDINGS BEFORE THE CALIFORNIA PUBLIC UTILITIES COMMISSION
(See instructions on reverse.) Also enter the total of Section C on Line C of the Summary of Payments section on page 1. $

O. Form 690 – Amendment To Lobbying Disclosure Report

Use Form 690 to amend information reported on Forms 615, 625, 630, 635, 635-C, 640, and 645. Use a separate Form 690 for each report you amend. If further clarification is needed, include the appropriate revised pages of the amended form to show changed information.

There is no deadline for filing a Form 690, but amendments should be filed as soon as practicable.

The lobbyist must sign the verification if the amendment is in connection with a Form 615. Only the designated officer of a lobbying firm may sign the verification when the amendment is in connection with a Form 625. In the case of an amendment a lobbyist employer/ lobbying coalition or $5,000 filer files, a responsible officer may sign the verification.

AMENDMENT TO LOBBYING DISCLOSURE REPORT

FOR USE BY FILERS AMENDING REPORTS FILED PURSUANT TO GOVERNMENT CODE SECTIONS 86100-86117

FORM 690
1990

TYPE OR PRINT IN INK

For information required to be provided to you pursuant to the Information Practices Act of 1977, see Information Manual on Lobbying Disclosure Provisions of the Political Reform Act.

FOR OFFICIAL USE ONLY

A

B

NAME OF FILER:
California Care Providers Association

NAME OF EMPLOYER OR FIRM: (If this amendment is being filed by a lobbyist)
N/A

BUSINESS ADDRESS OF FILER: (Number and Street)	(City)	(State)	(Zip Code)	TELEPHONE NUMBER:
819 L Street	Sacramento	CA	95814	(916) 444-5555

(The information required must correspond to the information provided on the original report field.)

1. The following information amends the lobbying disclosure report Form No. 635 executed on 4/30/20XX (Mo. - Day - Year)

   for the period 1/1/20XX to 3/31/20XX.

2. Amended information affects items on Part(s) B Section(s) _____.

3. Describe changes below.

   Total should be $8,500.

VERIFICATION

I have used all reasonable diligence in preparing this Amendment. I have reviewed the Amendment and to the best of my knowlege the information contained herein is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on (Date)	At (City and State)	By (Signature of Filer)
4/20/20XX	Sacramento, CA	[Signature Required]
Name of Filer (Type or Print)		**Title**
James S. Jennings		Chief Operating Officer

Authority

The following Government Code sections and Title 2 regulations provide authority for the information in this chapter:

Government Code Sections

81004	Reports and Statements; Perjury; Verification.
84309	Transmittal of Campaign Contributions in State Office Buildings.
85702	Contributions from Lobbyists.
86110	Recordkeeping.
86111	Activity Expense; Agency Official.
86112	Activity Expenses; Reporting.
86112.5	Invitations.
86113	Periodic Reports; Lobbyists; Contents.
86114	Periodic Reports; Lobbying Firms; Contents.
86115	Periodic Reports; Employers and Others.
86116	Periodic Reports; Employers and Others; Contents.
86116.5	Periodic Reports; State and Local Government Agencies.
86117	Periodic Reports; Filing; Time.
86118	Periodic Reports; Where to File.

Title 2 Regulations

18572	Lobbyist Contributions – Making a Contribution Defined.
18610	Lobbyist Accounting.
18611	Lobbyist Reporting.
18612	Accounting by Lobbying Firms.
18613	Reporting by Lobbying Firms.
18614	Payments for Lobbying Services.
18615	Accounting by Lobbyist Employers and Persons Spending $5,000 or More to Influence Legislative or Administrative Action.
18616	Reports by Lobbyist Employers and Persons Spending $5,000 or More to Influence Legislative or Administrative Action.
18616.4	Reports by Lobbying Coalitions Which Are Lobbyist Employers; Reports by Members of Lobbying Coalitions.
18617	Early Filing of Periodic Reports.
18624	Lobbyist Arranging Gifts.