

Civix Demo

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Implementation Phases

1. Initiation
2. Gap analysis
3. Configuration
4. Testing
5. Training
6. UAT
7. Go-live
8. Support

Filer Experience

- Register as lobbyist or employer
- Filer dashboard

Admin/Staff Experience

- Canned reports, ad hoc queries
- Recent system activity is displayed (registrations, filings, fines, etc.)
- Accept/reject registrations with email notifications
- “Work on behalf of” feature for customer support
 - Keep system notes not visible to the filer
- Event logs for a given filer
- System
 - Export reports as PDF or CSV
 - Manage users and roles
 - Manage filing cycles
 - Manage fines
- Auditing

- Notification templates and scheduling; ad-hoc email support coming next year

Public Experience

- Search lobbyists; review fines, filings, reports, and documents
- Search employers; review lobbyists and registrations
- Search filters

Notes

- Customize registration? For example, no badge. This would be identified in the gap analysis.
- Branding is customizable
- Payment gateway is flexible (Tyler, Cybersource, custom)

Landing Page

