# User Guide

# **Lobbyist Registration & Reporting System**

DISCLOSURE REPORTING INSTRUCTIONS

### Filing a Disclosure Report – Clients

Clients report the required information on 3 filing forms:

- Operating Expenses and Lobbyist Salaries
- Meals, Entertainment, Travel
- Additional Expenses

**All activities and expenses** must be incurred or paid within the relevant 6-month reporting period.

- A dollar amount is entered as \$ 1,234.56
- A date is entered as 01-01-2010

The link to **certify and submit** opens at the start of the 15-day submission period. Forms can be modified prior to the submission period and saved for later. This is referred to as the "diary" period.

- Reports must be submitted within 15 days after the 6-month reporting period.
- Once submitted, your report is reviewed and concluded, or returned as rejected.
- If rejected, you will receive details for additional information and an explanation.
- If concluded, you will receive a confirmation.

#### Remember to save your changes before moving to another form

- Save Select to save your data, and use the navigation bar at the top to change forms
- Save and Continue Selecting this automatically moves you to the next form.

#### Save your data!

If you try to move to another form with unsaved changes, you'll be asked to "Save" or "Don't Save." If you select "Don't Save," the system moves you to the next form and <u>does not save any data entered</u> <u>since the last time you saved.</u>

#### Error messages

You must correct error messages before moving to another form. Error messages display in red text.

### **Client Account Homepage**

Select the "Start report" link from your account homepage.



>> The screen images displayed throughout the online help documents do not represent

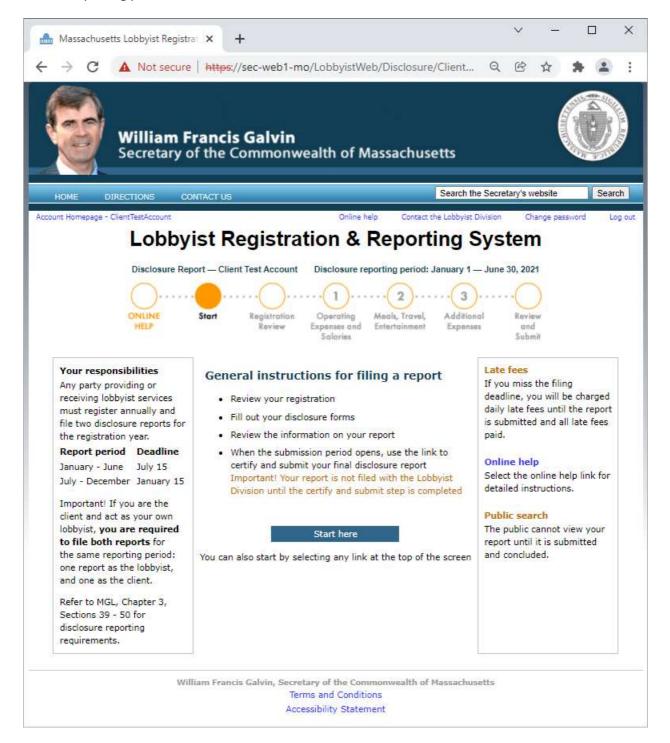
accurate reporting and submission dates, or actual lobbyists, entities, or

clients. The information contained within these sample screens is strictly intended for **instructional purposes** only.

#### Start on this Page

Clients are required to enter information on 3 forms:

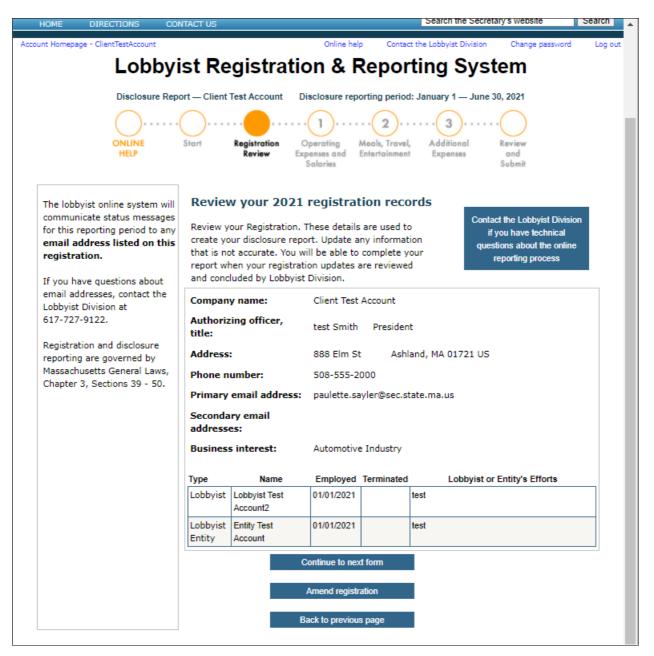
- Forms can be selected in any order.
- Report only those expenses or activities that are incurred or paid within the 6-month disclosure reporting period.



#### **Reviewing your Registration**

Update any information that changed during the registration year.

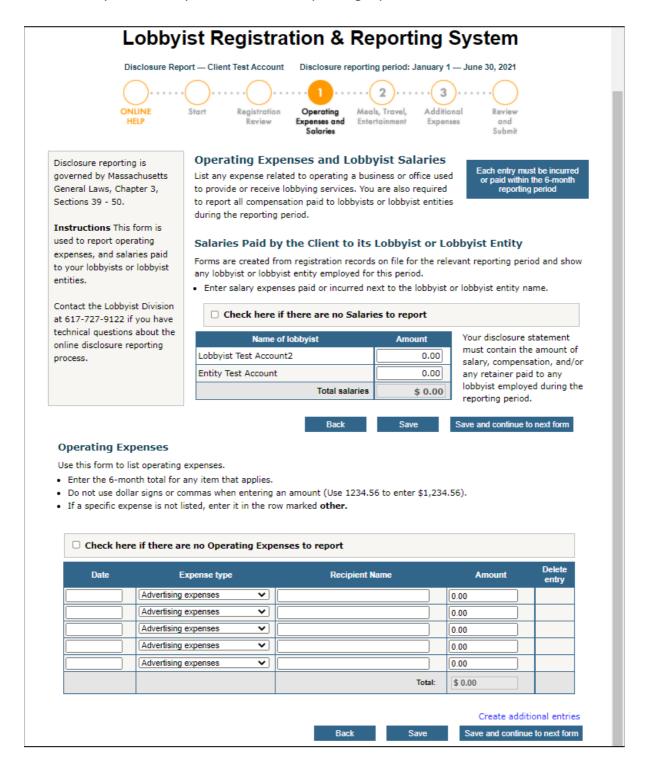
- Registration amendments must be submitted to the Lobbyist Division for review.
- Once these amendments are concluded, you will received a confirmation.
- You can then certify and submit your Disclosure Report.



#### Form 1 – Operating Expenses and Salaries

Report all compensation you paid to lobbyists or lobbyist entities during the reporting period.

- Provide as much information about each operating expense as possible.
- The system allows you to itemize each operating expense.



### Form 2 – Meals, Travel, Entertainment

Itemize any meals, travel, or entertainment expenses that are part of your lobbying activity.

- Enter the date of the event and select the event type.
- Enter the place of the event and the amount.
- Add the names of all persons participating in any such event—open the attendee list to enter these details.

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Disclosure report overned by Mas General Laws, Ch Sections 39 - 50.	sachusetts apter 3,	Itemize any expe related to lobbyin Enter date of the Enter name of Click on the lin details for the	tertainmer nses for meals, tra g efforts. he expense, and se Payee, Vendor, or k in Attendee List of individual entry. to continue adding	elect event Location, an column to e	ertainment that type. nd the amount. enter the require	are Withind	n the 6-month report period have technical ques but the online report isson at 617-727-91:	ting tions ng pyist
Date	re if there ar Event Ty	re no MET Expenses	to report	n	Amount	Attendee List	Action	
	Meal	<b>~</b>			0.00	Open		
				Total:	\$ 0.00			

# Form 2 – Meals, Travel, Entertainment (Continued)

This is a view of the Attendee List:

• As you enter each expense, you have the option to open the Attendee List to itemize details for

each attendee associated with that expense.

	Meals, Entertainment, Travel - Attend	lee List
:	Use a separate row to enter the name of each atter Identify any public officials and employees participa event.	
No.	Attendee Name	Action
1		
	·	
		*
	Click here to add another attend	ee
	Save all entries Close Attende	ee List

#### Form 3 – Additional Expenses

Itemize expenses that do not appear in any of the other forms

- Enter the date the expense was incurred or paid.
- Describe the purpose of the expense.
- Enter the name of the recipient or payee and the amount.
- To add more rows, select "Create additional entries."



#### **Review your Filing Forms**

Select "Review and Submit" from the navigation bar or "Save and continue to review screen" to review the data you entered on each form.

- To change an entry, select the form from the navigation bar.
- When you finish your review, select "Proceed to the certify and submit screen" to move to the next screen.
- If you are not ready to submit your disclosure report, select "Return to account homepage;" any information you entered will be saved.
- The link to certify and submit is available at the start of the 15-day submission period.

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Lobbyist Registrat & Reporting System Disclosure reporting is g Massachusetts General L Chapter 3, Sections 39 - Failure to itemize the rec information may cause t Division to reject your di report.	m overned by aws, 50. guired he Lobbyist		as been saved to date on is open. Certify and subm	Your Division at 617-727-9122 if you have any technical questions about the
		Client Registrat	tion Profile	
Business name	Client Tes	~		
Authorizing officer	test Smith	I	Title	President
Address	888 Elm 5	t, Ashland MA 01721, US		
Primary email	paulette.s	ayler@sec.state.ma.us	Phone	508-555-2000
Secondary email			Electronic Signature	
		e Industrv	1	

# Certify and submit your Report

When you are finished with your forms, you are ready to **certify and submit** your final report.

- Type your name in the Electronic Signature box and click on the check box to complete your certification.
- The submit link remains inactive (gray) until you check the certification box.

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-	Online help Contact the Lobbyist Division C <b>A Registration &amp; Reporting Syster</b> - Client Test Account Disclosure reporting period: January 1 – June 30, 20 	
HEP Lobbyist Registration & Reporting System	Electronic Signature: * qu	-
aaid. Failure to itemize the required nformation may cause the .obbyist Division to reject your report and may subject you to		
Failure to itemize the required information may cause the Lobbyist Division to reject your report and may subject you to penalties.	I certify that I am test Smith of Client Test Account and that the report I am submitting is complete and accurate for the current disclosure period. I further understand that any violation of the lobbying laws is punishable by civil and/or criminal penalties.	