

User Guide

Lobbyist Registration & Reporting System

Details for a Lobbyist Registration

An **individual lobbyist** represents only one client, or is a part of any group, company, or organization whose main business is providing lobbyist-type services.

An individual lobbyist may also be a salaried employee of the client he or she represents. For example, an employee hired by an organization (i.e., union or trade group) is asked to provide lobbying services as part of his or her job duties. In this case, the employee is the lobbyist and the organization is the client. Both must register, and both are responsible for filing disclosure reports for that registration year.

Meeting the requirements of the educational seminar

*All lobbyists are required to complete an educational seminar (online or in-person) **each year** prior to the annual registration period.* If there is no in-person seminar scheduled for the current registration year, you must read the online instructional materials and certify compliance on your registration form. The link to the online seminar is available on the sign-in screen.

This document covers the following topics:

- Filing dates and registration fee
- Email addresses
- Registration sequence
- Filling out the registration form
- Review and certification
- Making a payment
- Submitting for conclusion

After you complete and submit your registration, the Lobbyist Division will review for conclusion. If additional details are required, you will be contacted through the primary email address provided on your registration. Once it is concluded, your registration can be edited or updated at any time.

Filing dates and registration fee

Lobbyists pre-register in December for the upcoming registration year.

Annual registration period – December 1 through 15

Annual filing fee – \$100

New accounts register during the year

If you have just created a **new account**, you are required to register and pay for the full year regardless of the month in which you register. When you create a new account, the system generates a registration status message and link on your account homepage.

Email communication

Account email address: This address is used when you initially create your account. Your account user name and temporary password are emailed to this address.

Registration email address: The email address on your annual registration is used to communicate lobbyist requirements and important legal filing notices.

- You can update your email address by selecting “update registration” from your account homepage.

Primary email address used for user names and passwords: Requests for user names and passwords are emailed to the **primary email address** for the most current registration year.

If you have questions about email addresses, or you think you are not receiving email notifications, contact the Lobbyist Division for assistance.

System passwords

Your account is secure and can only be accessed by your **user name and password**.

User Names

The system creates a unique user name when you set up your account, and sends it to you in a confirmation email. You cannot change your user name.

User names are created using the first initial, last name, followed by six digits:

- User name for Lobbyist “Mike Smith”: msmith948110
- User name for Lobbyist “Alexander Timothy Johnson”: alexandertimothyjohn833001

Passwords

- You create your own password from a combination of letters, numbers, and special characters. You can change your password using the “change password” link.

Retrieving lost or forgotten credentials

If you cannot locate your user name or password, select the links on the main sign-in screen.

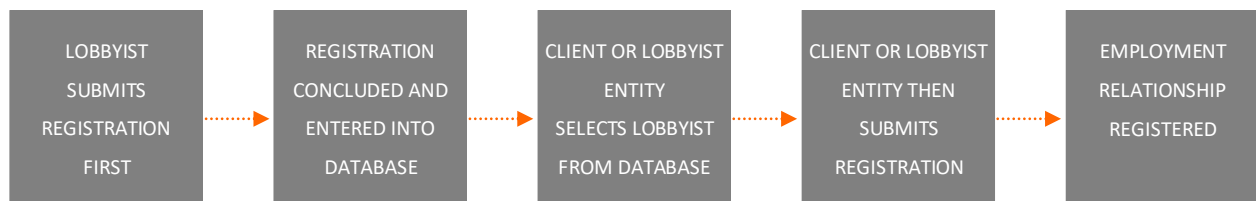
- Your **user name** is saved. It will be sent to the primary email address on your most current registration.
- Your **password** is not saved. A temporary password will be sent to your primary email. Use the “change password” link to personalize your temporary password.

Registration Sequence

A lobbyist registers first before the client or lobbyist entity

The sequence of registration creates a relationship in the database between the lobbyist and client or between the lobbyist and lobbyist entity. Once the lobbyist application is concluded, the registration is entered into the lobbyist system database. The lobbyist's client or lobbyist entity is then able to complete and submit its registration.

- During registration, **the client or lobbyist entity** uses a search tool to locate their registered lobbyist from the database.
- If the lobbyist is not registered, the client or lobbyist entity cannot complete its registration.



*>> The screen images displayed throughout the online help documents do not represent accurate reporting and submission dates, or actual lobbyists, lobbyist entities, or clients. The information contained within these sample screens is intended for **instructional purposes** only.*

Lobbyist instructions

Sign in to the system through the main page:

- You'll be directed to your **account homepage**.
- Select the **“complete and submit”** link to start.



Preparing and submitting a registration:

The first page provides general instructions for completing your registration.

Important: Your client(s) will not be able to register until your registration is submitted and concluded.

Lobbyist Registration & Reporting System
Lobbyist Registration | Registration year: 2013

Start Enter Data Review Pay Submit

Lobbyists and clients are required to register annually

- The annual registration period is open **December 1 through 15** prior to the registration year

If hiring, employing, or agreeing to employ a lobbyist or lobbyist entity after January 1 of the registration year, registration must occur within 10 days after such employment or agreement.

Registration and disclosure reporting are governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

If you have any questions about the registration process, contact the Lobbyist Division at 617-727-9122.

Preparing and submitting a registration

Complete all required areas of the form. When you are finished, review your registration and check the certification box. The final step is paying for and submitting your registration.

- Lobbyists register before clients** Your registration must be concluded and in the lobbyist system database before your client can finalize its registration.
- Business name** If you are a direct employee of the organization you are lobbying for (e.g. trade group, union), enter that company's name in the business field. If you are not, enter your name in both fields.
- Pay online** using a credit card or e-check. Your registration is paid for the full year, regardless of the month in which you register.
- Registration status** is confirmed by email. You can also check your status on your account homepage.

[Registration Form](#)

[Back to account homepage](#)

William Francis Galvin, Secretary of the Commonwealth of Massachusetts
[Terms and Conditions](#)

Complete the registration form

- **Lobbyist business name** - If you are the direct employee of the organization you are lobbying for, enter that company's name in the business field. If you are not a direct employee, enter your name in both fields.
- **Educational requirement** - You are required to check the box to indicate you have attended an in-house lobbyist educational seminar, or studied the online materials.
- **Employment Declaration** - You are required to declare whether you are employed by a client or a lobbyist entity.

Select **save and continue**. (If you miss a required field, the system generates an error message).

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links: 'Account Homepage - bsmith315957', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. Below this is a progress bar with five steps: 'Start', 'Enter Data', 'Review', 'Pay', and 'Submit'. The 'Enter Data' step is currently active. The main form is titled 'Lobbyist registration form' with a note '* Complete all required fields'. The form fields include: 'Name (first, middle, last)', 'Business name', 'Street address', 'Suite, floor, apartment', 'City, state, zip code', 'Country' (set to 'United States'), 'Area code, phone number', 'Primary email address' (pre-filled with 'paulette.sayler@sec.state.ma.us'), 'Secondary email addresses', 'Agent type' (radio buttons for 'Legislative', 'Executive', 'Both'), and 'Employment declaration' (radio buttons for 'I will be employed by a Lobbyist Entity' and 'I will be employed by a Client'). There are two error messages: '* The client relationship is not registered' and '* The lobbyist entity relationship is not registered'. At the bottom left, there is a link for 'Lobbyist Educational Seminar' with instructions. At the bottom right, there is a checkbox for 'I have completed the Lobbyist Educational Seminar.', a 'SAVE AND CONTINUE' button, a 'Back to account homepage' button, and a red warning box stating: 'All executive and legislative agents must complete the Lobbyist Educational Seminar prior to registration.'

Certify the educational requirement

- Click on the **“Save and continue”** button to move to the next screen:

The screenshot shows the 'Lobbyist Registration & Reporting System' interface for the 2021 registration year. At the top, there are navigation links: 'Account Homepage - Item#0315937', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. Below these is a progress bar with five steps: 'Start', 'Enter Data', 'Review', 'Pay', and 'Submit'. The 'Enter Data' step is currently active, indicated by an orange circle.

The main form is titled 'Lobbyist registration form' and includes a note: 'Complete all required fields'. The form fields are as follows:

- Name (first, middle, last): Three text input boxes.
- Business name: One text input box.
- Street address: One text input box.
- Suite, floor, apartment: One text input box.
- City, state, zip code: Three text input boxes.
- Country: A dropdown menu set to 'United States'.
- Area code, phone number: One text input box.
- Primary email address: One text input box containing 'paulette.saylor@sec.state.ma.us'.
- Secondary email addresses: One text input box.
- Agent type: Radio buttons for 'Legislative', 'Executive', and 'Both'.
- Employment declaration: Radio buttons for 'I will be employed by a Lobbyist Entity' and 'I will be employed by a Client'.

Below the form, there are two checkboxes:

- The client relationship is not registered.
- The lobbyist entity relationship is not registered.

At the bottom left, there is a link for 'Lobbyist Educational Seminar' with instructions: 'Select this link to access the online educational documents. If you have questions about the educational requirement, contact the Lobbyist Division at 617-727-8122.'

At the bottom right, there is a checkbox: I have completed the Lobbyist Educational Seminar. Below this are two buttons: 'SAVE AND CONTINUE' (grey) and 'Back to account homepage' (blue). A red warning box states: 'All executive and legislative agents must complete the Lobbyist Educational Seminar prior to registration.'

- If you select **“back to account homepage”** at this step, any data you entered will be saved.

Review and certify

When you are satisfied with your registration, check the **certification box** and **“agree and continue”** to move to the payment screens.

- If you select **“save for later,”** your data is saved at this step, but your registration is not submitted.
- The system generates an alert that your registration filing and payment must be received by the Lobbyist Division **within 5 days** to meet the registration requirements of the lobbying laws.

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - ba148315937 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Lobbyist Registration | Registration year: 2021

Start Enter Data Review Pay Submit

Review registration and certify

Lobbyist name:	Barbara Smith
Business name:	Company B
Address:	123 Main Street Ashland, MA 01721 US
Phone number:	781-332-8000
Primary email address:	paulette.sayler@sec.state.ma.us
Secondary email addresses:	
Agent type:	Legislative and Executive Agent
Employment declaration:	I will be employed by a Lobbyist Entity

* The client relationship is not registered
* The lobbyist entity relationship is not registered

Account notices are emailed to all addresses. Passwords are emailed to only the primary address. Notice may also be sent by mail to the lobbyist name at the address listed.

Once concluded, your registration information is visible to the public.

Read statement and check this box to certify your registration
Under the pains and penalties of perjury, I certify that I am Barbara Smith and that this registration is complete and accurate for the period indicated. I further understand that any violation of the lobbying laws is punishable by civil and/or criminal penalties.

AGREE AND CONTINUE
Save for Later
Back to Registration Form

Make a registration payment

Select “**pay online**” to make an immediate payment using a credit card or e-check.

- The system will direct you to the Secretary of the Commonwealth’s website to complete your online payment. An expedited fee is added when you make your payment.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, it features a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search box. The main content area is titled 'Lobbyist Registration & Reporting System' and indicates the current step is 'Pay' in a registration year of 2012. A progress bar shows five steps: Start, Enter Data, Review, Pay, and Submit, with 'Pay' being the active step. On the left, there are sections for 'Registration Filing Fees' and 'Disclosure Report late fees'. The 'Registration Filing Fees' section lists: Lobbyist - \$100; Lobbyist - \$1,000, plus \$100; Entity - for each sub-agent registered; and Client - \$100 for each lobbying relationship registered. The 'Disclosure Report late fees' section lists: \$50 / day - Up to 20 days; and \$100 / day - After 20 days, and until the report is submitted and all late fees paid. A note states 'Disclosure late fees as of January 1, 2010'. The central area is titled 'Payment is now due:' and contains a table with the following data:

Reason	Filing fee for registration of individual lobbyist:
Account	Test Account Lobbyist
	\$100.00
Total amount due:	
	\$100.00

Below the table, it says 'Select a payment method:' and provides two options: 'Pay Online' (with a sub-note: 'Use an e-check, MasterCard, Visa, or American Express. An expedited fee is added at time of payment.') and 'Account homepage'. On the right, there is a 'For assistance' section with contact information for the Lobbyist Division and a note that registration and disclosure reporting are governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50. The footer of the page includes the Secretary's name, 'Terms and Conditions', and a browser status bar showing 'Local intranet' and '100%' zoom.

Confirmation

The system generates a screen to confirm that the Lobbyist Division received your online registration filing and your payment.

- Your registration will be reviewed for conclusion.
- Select **“account homepage”** to view your current registration status.



Registration concluded

The account homepage reflects that your registration was reviewed and concluded by the Lobbyist Division.

- If your registration filing is reviewed and rejected, or requires a correction, you will see that status reflected on your account homepage.
- Your client is now able to complete its registration.

The screenshot shows a web browser window displaying the account homepage for the Lobbyist Registration & Reporting System. The page header includes the name and title of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and a search bar. The main content area is titled "Lobbyist Registration & Reporting System" and contains a welcome message for the user "LobbyistTestAccount".

Welcome, LobbyistTestAccount

- Your 2012 registration is concluded.
- Your client is required to add you to its registration. Contact that party directly, or the Lobbyist Division for assistance.
- Your next disclosure report is due January 15, 2013.
- Your disclosure report for the January - June 2012 reporting period is not required. Your registration date is: 11/19/2012. If this information is not accurate, contact the Lobbyist Division.

Registration	Disclosure Reports
2012 Registration Concluded Client relationship incomplete <ul style="list-style-type: none">• Update registration• View or print a copy• Payment history	July - December 2012 <ul style="list-style-type: none">• Start report January - June 2012 Report not required

Registration and disclosure reporting are governed by Mass. General Laws, Chapter 3, Sections 39 through 50.

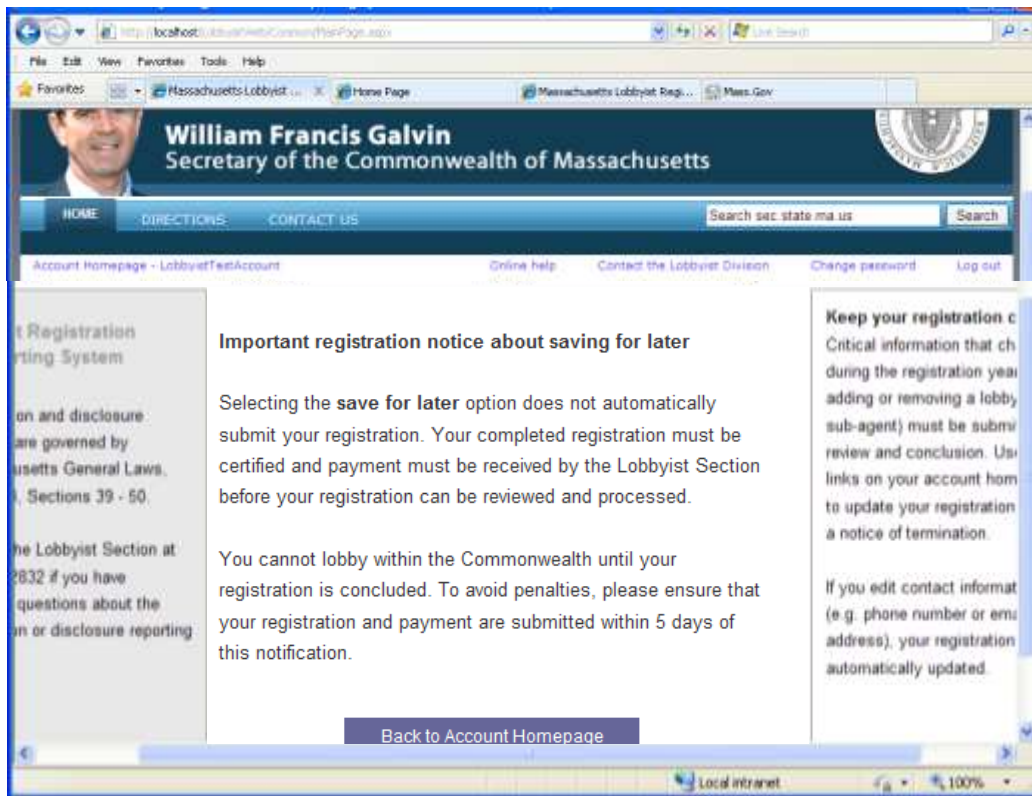
Contact the Lobbyist Division at 617-727-9122 if you require account assistance. This office can answer questions about using the online system, or provide technical assistance with the registration or disclosure reporting process.

Prior to registration, all executive and legislative agents are required to complete the Lobbyist Educational Seminar.

Saving a registration

The system generates a saved-only status screen.

- The account homepage reflects that your registration is submitted but it **cannot be reviewed** until you **complete and submit** your registration with payment.



Payment Pending Status

Your registration cannot be reviewed and concluded if it is in payment pending status.

- Click on the link to navigate to the payment screen.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, it identifies William Francis Galvin as the Secretary of the Commonwealth of Massachusetts. The navigation bar includes links for HOME, DIRECTIONS, and CONTACT US, along with a search box. The main content area is titled 'Lobbyist Registration & Reporting System' and features a 'Welcome, LobbyistTestAccount' message. A key notification states: 'Your 2012 registration is submitted but not paid. Your payment must be received by the Lobbyist Division. Use the link below to make a payment.' This notification is highlighted with a red dotted circle. Below this, there are two main sections: 'Registration' and 'Disclosure Reports'. The 'Registration' section shows '2012 Registration' with a 'Payment pending' status and a 'Make a payment' link. The 'Disclosure Reports' section shows '2012 Reports' with a note that links appear when registration is submitted, paid, and concluded. The footer of the page identifies the Secretary and includes a 'Local intranet' link.