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.

LOBBYIST SUBMITS REGISTRATION FIRST → REGISTRATION CONCLUDED AND ENTERED INTO DATABASE → CLIENT OR LOBBYIST ENTITY SELECTS LOBBYIST FROM DATABASE → CLIENT OR LOBBYIST ENTITY THEN SUBMITS REGISTRATION → EMPLOYMENT RELATIONSHIP REGISTERED

>> 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:

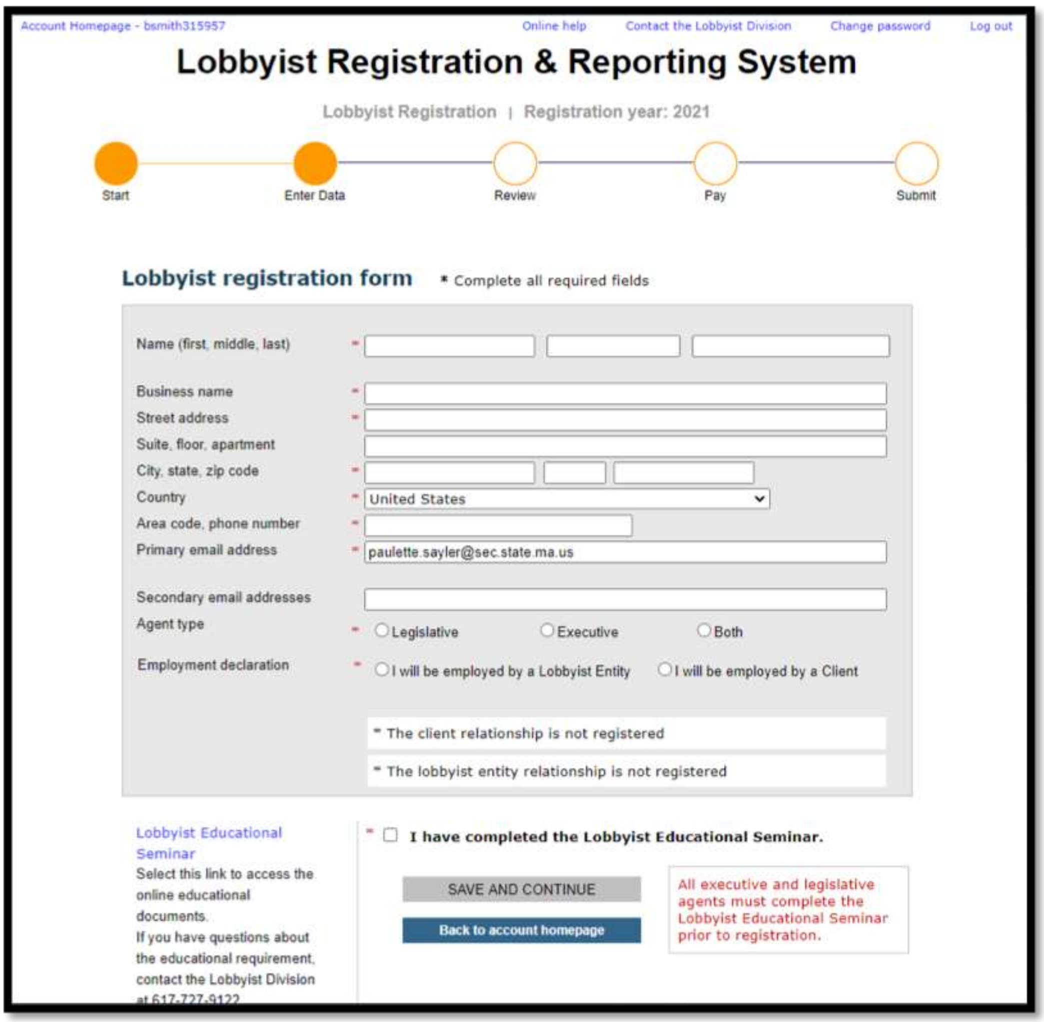
The first page provides general instructions for completing your registration.

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

Complete the registration form

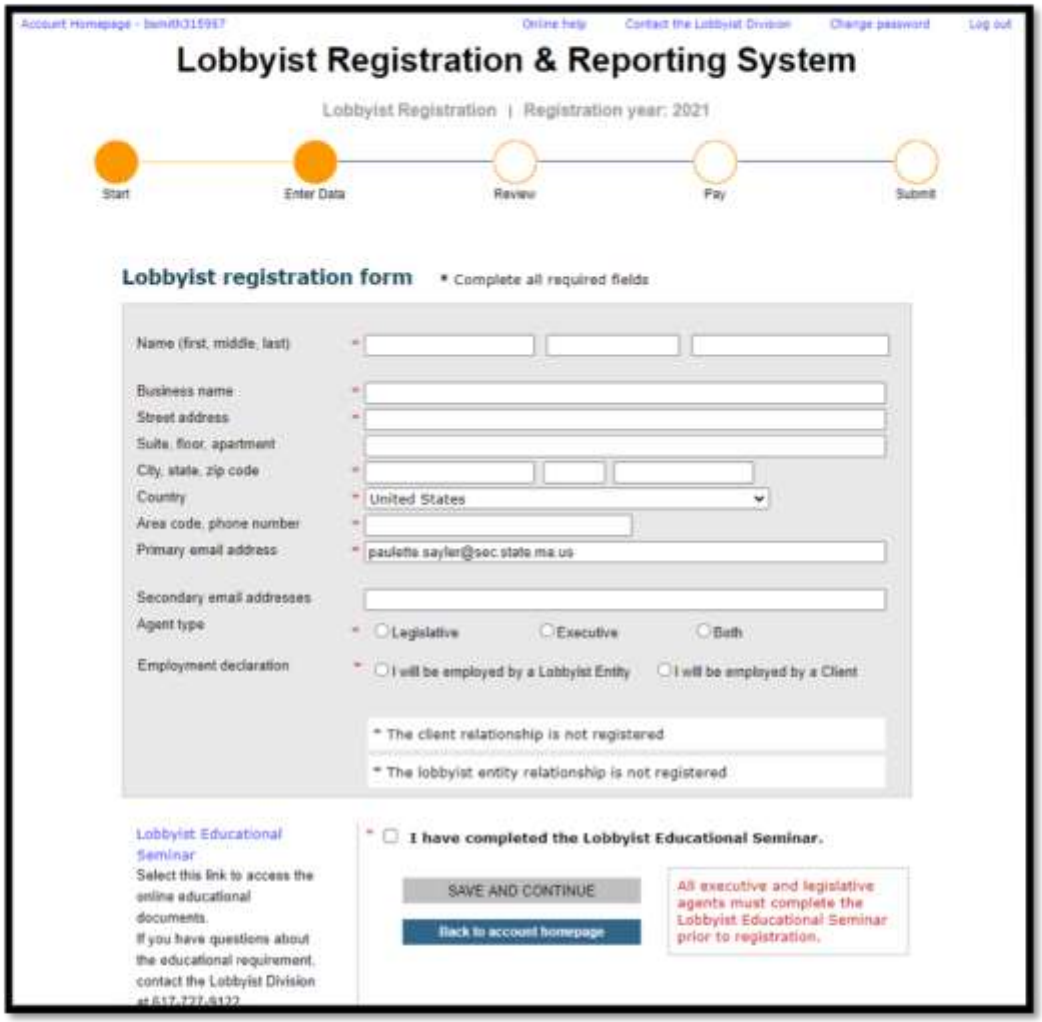
- **Lobbyist business name** - If you are the direct employee of the organization you are lobbying for, enter that company's name in the business field. If you are not a direct employee, enter your name in both fields.
- **Educational requirement** - You are required to check the box to indicate you 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).



Certify the educational requirement

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



- 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.

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.

Confirmation

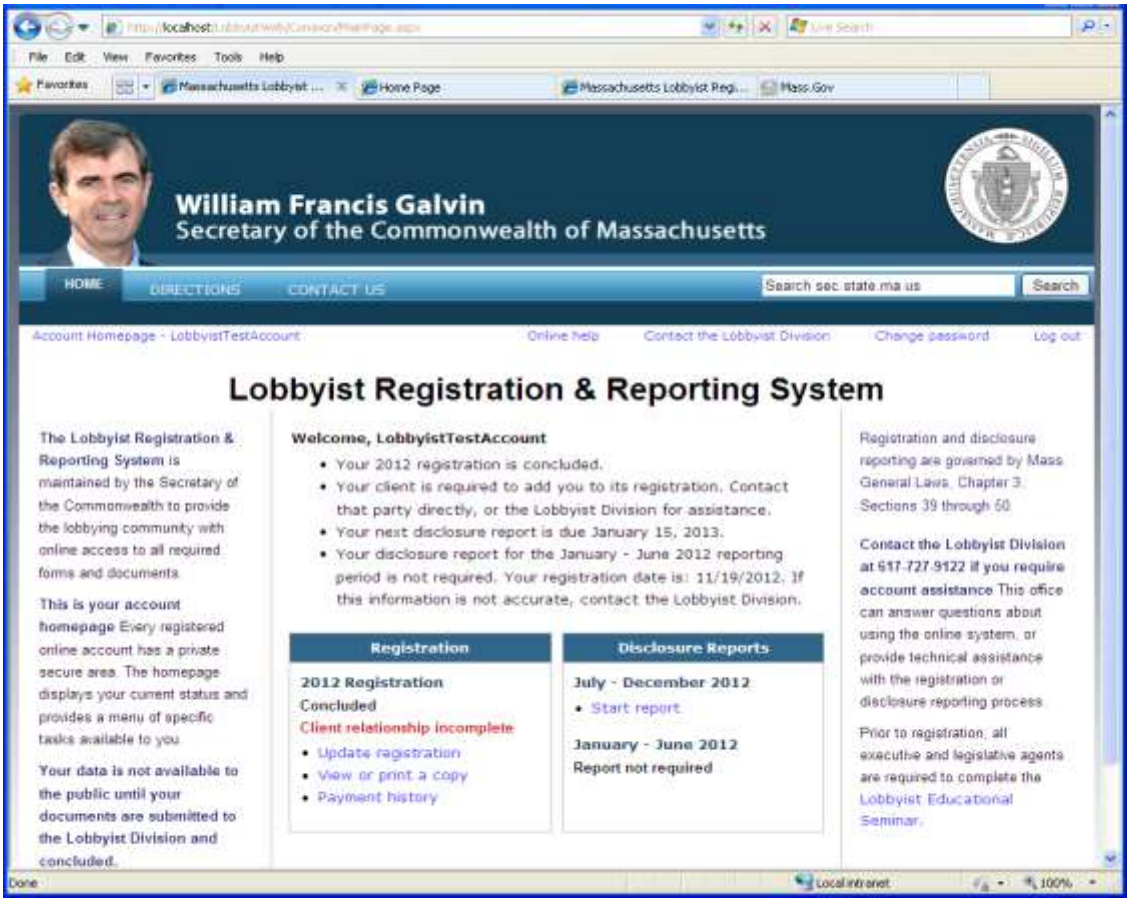
The system generates a screen to confirm that the Lobbyist Division received your online registration filing and your payment.

- 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.

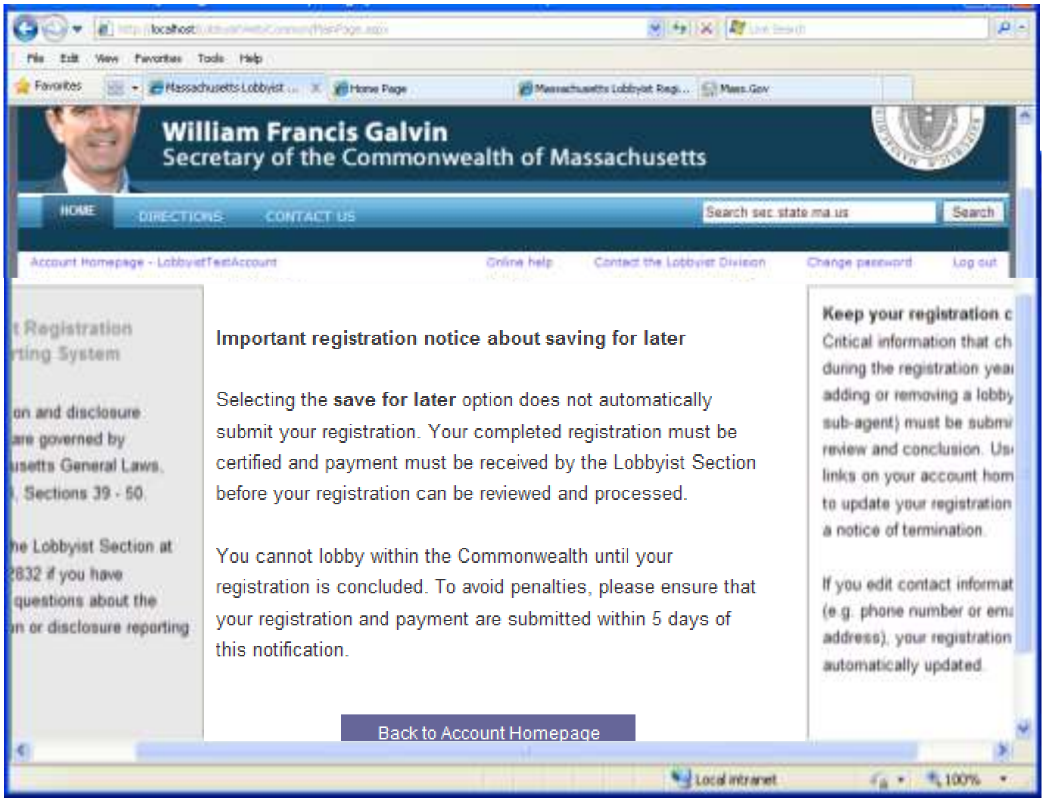
- If your registration filing is reviewed and rejected, or requires a correction, you will see that status reflected on your account homepage.
- Your client is now able to complete its registration.



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.