

# User Guide

## Lobbyist Registration & Reporting System

### Details for an Entity Registration

A **Lobbyist Entity** is one or more lobbyists providing lobbyist-type services to a client.

An individual whose **main business** is providing lobbyist-type services is required to register as a lobbyist entity. This lobbyist registers as the lobbyist entity and the lobbyist entity's lobbyist.

### This document covers the following topics:

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

After you complete and submit your registration, the Lobbyist Division will review it for conclusion. If additional details are required, you will be contacted through the primary email address provided on your registration.

Once concluded, your registration can be edited or updated at any time.

### Filing dates and registration fee

Lobbyist Entities register in December for the upcoming registration year:

**Annual registration period** – December 1 through 15

**Annual filing fee** – \$1,000

## 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 registered. 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.

- Use the email address of your organization's **authorizing officer**. This individual certifies registration and disclosure reporting forms prior to submission.
- If you want others in your organization to receive notifications, enter these email addresses on the registration form.
- You can update email addresses by selecting "update registration" from your account homepage.

## Primary email address used for user name and password requests

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.

Entity user names are created using up to the first 20 characters of the Entity’s business name, followed by six digits.

- User name for Entity “The Chauncey Group Lobbyists”: thechaunceygrouplobb721388
- User name for Entity “Chauncey Group”: chaunceygroup964300

### Passwords

You create your own password from a combination of letters, numbers, and special characters. You can change your password at any time 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.

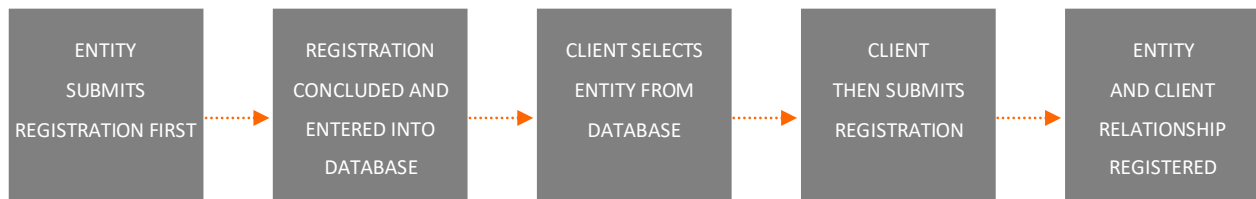
- Your **user name** is saved. It will be sent to the primary email address on your most current registration.
- Your **password** is not saved. A temporary password will be sent to your primary email. Use the change password link to personalize your temporary password.

### Registration sequence – entity registers before client

>> *The lobbyist entity registers **first** as a pre-requisite to their client’s registration. The sequence of registration creates a relationship in the database between the lobbyist entity and client.*

Once the lobbyist entity application is concluded, the registration is entered into the lobbyist system database. The entity’s client is then able to complete and submit its registration.

- During registration, **the client** searches for the registered entity.
- If the entity is not registered, the client cannot complete its registration.



>> *The screen images displayed throughout the online help documents do not represent accurate reporting and submission dates, or actual lobbyists, entities, or clients.*

## Lobbyist Entity instructions

The registration link is on your homepage:

- **Sign in** to the system through the main page.
- You'll be directed to your **account homepage**.
- Select the **registration link** to access the registration form.



## Preparing and submitting a registration

Account Homepage - companyb3504307 [Online help](#) [Contact the Lobbyist Division](#) [Change password](#) [Log out](#)

# Lobbyist Registration & Reporting System

Lobbyist Entity Registration | Registration year: 2021

**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. Late fees may be assessed if the employment date is more than (10) ten days prior to the date of submission.

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

When you complete all forms, review, certify and submit with your payment.

- Entities register before clients** Your registration must be concluded and in the lobbyist system database before your client can submit its registration.
- 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.

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## Complete the registration form

- Fill out all required fields.
- Select **“save and continue”**.
- If you miss a required field, the system generates an error message.
- If you select **“back to account homepage”** at this step, your data will not be saved.
- You are now ready to begin adding your lobbyists to your registration.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links: 'Account Homepage - company63504307', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. The main heading is 'Lobbyist Registration & Reporting System', with a sub-heading 'Lobbyist Entity Registration | Registration year: 2021'. A progress bar below the heading shows seven steps: Start, Enter Data, Add Lobbyist, Search Lobbyist, Review, Pay, and Submit. The 'Enter Data' step is currently active.

The 'Lobbyist Entity registration form' is the central focus. It includes a note: '\* Complete all required fields'. The form fields are as follows:

- Company name: [Text input]
- Authorizing officer name: (first, middle, last) [Text input]
- Title: [Text input]
- Street address: [Text input]
- Suite, floor, apartment: [Text input]
- City, state, zip code: [Text input]
- Country: [Dropdown menu, currently set to 'United States']
- Area code, phone number: [Text input]
- Primary email address: [Text input, containing 'paulette.sayler@sec.state.ma.us']
- Secondary email addresses: [Text input]

Below the form, there is a message: '\* The client relationship is not registered'. At the bottom left, there is a link for 'Lobbyist Educational Seminar' with instructions to select the link to access online educational documents. At the bottom right, there is a message: 'Select save and continue to add lobbyists to your registration.' Below this message are two buttons: 'Save and Continue' and 'Back to account homepage'. The 'Save and Continue' button is highlighted with a red dotted circle.

## Adding your lobbyists

You are required to add to your registration the name of any lobbyist under your employment.

- Select “**search**” to access the online database of registered lobbyists and entities.
- Only lobbyists that selected that they would be hired by an entity will display in the drop down selection.
- You return to this screen to view your list of lobbyists:

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a search bar and navigation links. Below the header, a progress bar indicates the current step: 'Add Lobbyist'. The main content area is titled 'Lobbyist Entity list:' and contains a message: 'There are no lobbyists listed on your registration.' Below this message are two buttons: 'Back to lobbyist entity registration' and 'Search'. At the bottom, there are links for 'Terms and Conditions' and 'Accessibility Statement'.

## Search for a lobbyist from the database

Your lobbyist must be **registered**.

- If you employ more than one lobbyist, create a separate search for each one.
- Enter a name and select “search.”

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a search bar and navigation links. Below the header is a progress bar with seven steps: Start, Enter Data, Add Lobbyist, Search Lobbyist, Review, Pay, and Submit. The 'Search Lobbyist' step is currently active. The main content area is titled 'Search for your lobbyist:' and includes instructions on how to search, a text input field for the lobbyist's last name, and buttons for 'Search', 'Clear text', and 'Back to previous page'. There are also links for 'Terms and Conditions' and 'Accessibility Statement' at the bottom.

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Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - company83504307 Online help Contact the Lobbyist Division Change password Log out

### Lobbyist Registration & Reporting System

Lobbyist Entity Registration | Registration year: 2021

Start Enter Data Add Lobbyist Search Lobbyist Review Pay Submit

**Enter lobbyist Last Name to start your search**

Search for one lobbyist at a time:

- Do not search for a sub-agent; the lobbyist entity's relationship is with the lobbyist.

**No results?** Make sure your lobbyist's registration is submitted and concluded. Check the spelling.

If you still cannot locate your lobbyist, contact the Lobbyist Division at 617-727-9122 to determine if they are registered.

### Search for your lobbyist:

Your registration must include the name of any lobbyist employed to work on your behalf for this registration year. Only lobbyists registered in this system can be retained by lobbyist entity.

The system will display a "select" link with your search results. Click on select to add the lobbyist.

**Enter lobbyist Last Name:**

Search Clear text Back to previous page

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## Search results

Select your lobbyist from the **results** shown above the search boxes.

- If the results are not correct, search again.
- If the results are correct, click on the **“select”** link to move to the next screen where you will add required details for this lobbyist.

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a navigation bar containing 'HOME', 'DIRECTIONS', and 'CONTACT US'. A search bar is located in the top right corner. Below the header, a progress bar indicates the current step: 'Search Lobbyist'. The main content area is titled 'Search for your lobbyist:' and includes instructions on how to search and what results to expect. A search input field contains the text 'smith', and there are buttons for 'Search', 'Clear text', and 'Back to previous page'. Below the search field, a table displays two search results: 'Betsy Smith' and 'John A Smith', each with a 'Select' link. The footer of the page includes the Secretary's name and links to 'Terms and Conditions' and 'Accessibility Statement'.

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### Lobbyist Registration & Reporting System

Lobbyist Entity Registration | Registration year: 2021

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**Enter lobbyist Last Name to start your search**

Search for one lobbyist at a time:

- Do not search for a sub-agent; the lobbyist entity's relationship is with the lobbyist.

**No results?** Make sure your lobbyist's registration is submitted and concluded. Check the spelling.

If you still cannot locate your lobbyist, contact the Lobbyist Division at 617-727-9122 to determine if they are registered.

**Search for your lobbyist:**

Your registration must include the name of any lobbyist employed to work on your behalf for this registration year. Only lobbyists registered in this system can be retained by lobbyist entity.

The system will display a "select" link with your search results. Click on select to add the lobbyist.

**Enter lobbyist Last Name:**

smith

Search Clear text Back to previous page

**Records found: 2**

Name of Lobbyist	Select
Betsy Smith	Select
John A Smith	Select

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## Add employment details for each lobbyist

- Enter the **date** you are employing, or plan to employ, each lobbyist.
- Select **“save and continue”** to continue to the next step.



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### Lobbyist Registration & Reporting System

Lobbyist Entity Registration | Registration year: 2021

Start Enter Data Add Lobbyist Search Lobbyist Review Pay Submit

#### Add the required information for your lobbyist

Lobbyist name: Betsy Smith

Employment date: \*

Back to search Save and continue

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## Lobbyist Entity List

Each time you save a lobbyist entry, the system directs you to the list of lobbyists.

- Select “**search**” to continue adding lobbyists.
- When all lobbyists are added, select “**save and continue**” to proceed to the next screen.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a search bar and navigation links. Below the header, a progress bar shows the registration process steps: Start, Enter Data, Add Lobbyist, Search Lobbyist, Review, Pay, and Submit. The 'Search Lobbyist' step is currently active. The main content area is titled 'Lobbyist Entity list:' and contains a paragraph explaining the list's purpose and a bulleted list of instructions. Below the text is a table with columns for Lobbyist name, Employment date, Termination date, Edit entry, and Delete entry. The table contains one entry for Betsy Smith with an employment date of 01/01/2021. At the bottom of the page, there are buttons for 'Back to lobbyist entity registration', 'Search', and 'Save and Continue', along with footer text and links for 'Terms and Conditions' and 'Accessibility Statement'.

**Lobbyist Entity list:**

This list displays the name of any individual lobbyist who is providing or will provide lobbying services on your behalf during the registration year.

- Each time you add a lobbyist, you return to this screen to view your list.
- **Date of employment** is the date in the registration year the lobbyist agrees to provide lobbying services. This date is usually January 1. Late fees may be assessed if the employment date is more than (10) ten days prior to the date of submission.
- After all lobbyists are added, select **Save and Continue** to proceed to the review, certification, and payment steps.
- Before you submit your registration, you can **edit** details or **remove** an entry from this list.

Lobbyist name	Employment date	Termination date	Edit entry	Delete entry
Betsy Smith	01/01/2021		<a href="#">Edit</a>	<a href="#">Remove</a>

[Back to lobbyist entity registration](#)   [Search](#)   [Save and Continue](#)

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## Review registration

Check the “certification box” and “agree and continue” to move to the payment screens.

- “Agree and continue” remains inactive until you check the certification box.
- If you select “save for later”, your data is saved at this step, but your registration is not submitted.

Select “save and continue” to proceed to the payment screen.

If you select “back to account homepage” at this step, your data will be saved.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. Below the navigation, the user's account information is shown: 'Account Homepage - bsmith315957'. The main heading is 'Lobbyist Registration & Reporting System', with a sub-heading 'Lobbyist Registration | Registration year: 2021'. A progress bar shows five steps: Start, Enter Data, Review, Pay, and Submit. The 'Review' step is currently active, indicated by a solid orange circle, while the others are either solid orange (Start, Enter Data) or hollow orange (Pay, Submit).

**Review registration and certify**

<b>Lobbyist name:</b>	Barbara Smith
<b>Business name:</b>	Company B
<b>Address:</b>	123 Main Street      Ashland, MA 01721 US
<b>Phone number:</b>	781-332-8000
<b>Primary email address:</b>	paulette.sayler@sec.state.ma.us
<b>Secondary email addresses:</b>	
<b>Agent type:</b>	Legislative and Executive Agent
<b>Employment declaration:</b>	I will be employed by a Lobbyist Entity
	<input type="checkbox"/> The client relationship is not registered
	<input type="checkbox"/> 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**

## Payment and submission

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 shows the 'Lobbyist Registration & Reporting System' interface. At the top, there is a header with a portrait 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, CONTACT US, and a search bar. The main content area features a progress bar with seven steps: Start, Enter Data, Add Lobbyist, Search Lobbyist, Review, Pay, and Submit. The 'Pay' step is currently active. Below the progress bar, there are three main sections: 'Registration Filing Fees', 'Payment is now due:', and 'For assistance'. The 'Registration Filing Fees' section lists fees for Lobbyist (\$100), Lobbyist Entity (\$1,000), and Client (\$100 per lobbying relationship). The 'Payment is now due:' section shows a table with a total amount due of \$1,000.00. The 'For assistance' section provides contact information for the Lobbyist Division. At the bottom, there are buttons for 'Pay Online' and 'Account homepage', along with a note about using e-check, MasterCard, Visa, or American Express.

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Secretary of the Commonwealth of Massachusetts

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Account Homepage - entitytestaccount753695 Online help Contact the Lobbyist Division Change password Log out

### Lobbyist Registration & Reporting System

Lobbyist Entity Registration | Registration year: 2021

Start Enter Data Add Lobbyist Search Lobbyist Review Pay Submit

**Registration Filing Fees**

Lobbyist	\$100
Lobbyist Entity	\$1,000
Client	\$100 for each lobbying relationship registered

**Disclosure Report late fees**

\$50 / day	Up to 20 days
\$100 / day	After 20 days, and until the report is submitted and all late fees paid

*Disclosure late fees as of January 1, 2010*

**Payment is now due:**

Reason	Filing fee for registration of lobbyist entity:	
Account	Entity Test Account	\$1,000.00
<b>Total amount due:</b>		<b>\$1,000.00</b>

**Pay Online**

Use an e-check, MasterCard, Visa, or American Express.  
An expedited fee is added at time of payment.

**Account homepage**

**For assistance**  
If you have any questions about making a payment, contact the Lobbyist Division at 617-727-9122.

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

## Online payment process

The system generates a screen to confirm receipt of online payment and registration.

- Your client is now ready to complete and submit its registration

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there is 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 'Lobbyist Entity Registration 2021'. It features a central 'Confirmation of payment' section with a message: 'This transaction confirms that your filing has been paid for and submitted to the Lobbyist Division for review and conclusion.' Below this, there are two bullet points: 'The Lobbyist Division will notify you if additional information is required' and 'Check your email and account homepage for your current status'. A confirmation number '200288' is displayed in a text box. A 'Back to account homepage' button is located below the confirmation number. To the left, there is a box with text about lobbyist registration and disclosure reporting, and contact information for the Lobbyist Division. To the right, there is a box titled 'Keep your registration current' with instructions on how to update registration or file a notice of termination. At the bottom, there is a footer with the Secretary's name and links for 'Terms and Conditions' and 'Accessibility Statement'.

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Secretary of the Commonwealth of Massachusetts

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Account Homepage - entitytestaccount753695 Online help Contact the Lobbyist Division Change password Log out

### Lobbyist Registration & Reporting System

Lobbyist Entity Registration 2021

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

Contact the Lobbyist Division at 617-727-9122 if you have technical questions about the registration or disclosure reporting process.

#### Confirmation of payment

This transaction confirms that your filing has been paid for and submitted to the Lobbyist Division for review and conclusion.

- The Lobbyist Division will notify you if additional information is required
- Check your email and account homepage for your current status

This is your confirmation number:

[Back to account homepage](#)

**Keep your registration current** Critical information that changes during the registration year (e.g., name changes, adding or removing a lobbyist or sub-agent) must be submitted for review and conclusion.

Use the links on your account homepage to update your registration, or file a notice of termination.

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## Registration concluded

The account homepage reflects that your registration was reviewed and concluded.

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

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Account Homepage - entitytestaccount753695 Online help Contact the Lobbyist Division Change password Log out

### Lobbyist Registration & Reporting System

The Lobbyist Registration and Reporting System is maintained by the Secretary of the Commonwealth to provide the lobbying community with online access to all required forms and documents.

**This is your account homepage**  
Every registered online account has a private secure area. The homepage displays your status and provides a menu of specific tasks available to you.

Your data is not available to the public until your registration and disclosure reports are reviewed and concluded by the Lobbyist Division.

**Welcome, entitytestaccount753695**

- Your 2021 registration is concluded.
- Your next disclosure report is due July 15, 2021.
- The link to your disclosure report for the January - June 2021 reporting period will be made available prior to the submission period.
- The link to your disclosure report for the July - December 2021 reporting period will not be available until the prior report is submitted and concluded.

Registration	Disclosure Reports
<b>2021 Registration</b> Concluded 11-25-2020 <ul style="list-style-type: none"><li>• <a href="#">Amend registration</a></li><li>• <a href="#">View or print</a></li><li>• <a href="#">Terminate a lobbying relationship</a></li><li>• <a href="#">Payment history</a></li></ul> History: <input type="text" value="Select"/>	<b>January - June 2021</b> Link available prior to the submission period <b>July - December 2021</b> Link not available

Select a year to access prior registration and disclosure reports:  
[2021](#)

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

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