

User Guide

Lobbyist Registration & Reporting System

DISCLOSURE REPORTING INSTRUCTIONS

Filing a Disclosure Report – Lobbyists

This document provides instructions and screen samples for the two types of Lobbyists:

- Directly employed by a Client (pages 2 – 13)
- Employed by a Lobbying Entity (pages 14 – 23)

All lobbyists are required to report the required information on a series of filing forms:

- If you are **employed by a Client**, you will submit your forms directly to the Lobbyist Division.
- If you are **employed by a Lobbying Entity**, you will complete the required information on your forms, but your Entity will submit them as part of its report to the Lobbyist Division,

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 **complete and finish your report** 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 two weeks after the 6-month reporting period.
- Once submitted, reports are reviewed by the Lobbyist Division and either concluded or rejected.
- If rejected, the Lobbyist Division requests details, additional information, or an explanation.
- A confirmation is received once concluded.

Lobbyists directly employed by a Client

Read pages **2 through 13** for screen samples and instructions

Lobbyists employed by a Lobbying Entity

Read pages **14 through 23** for screen samples and instructions

Lobbyists directly employed by a Client

*Note: These instructions are for **lobbyists directly employed by a Client**. If you are a lobbyist employed by a Lobbying Entity, you can find your instructions starting on page 13.*

Access your Disclosure Report from the link on your account homepage

- Fill out all required sections of your disclosure reporting forms.
- Review, certify, and submit to the Lobbyist Division for review.

Remember to save your changes before moving to another form

- **Save** – Select to save your entries, 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 entries

If you try to move to another form with unsaved entries, 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 does not save any data you entered since the last time you saved.

! Error messages

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

Lobbyists directly employed by a Client

Account Homepage

Select the “Start report” link from your account homepage.

The screenshot shows the account homepage for William Francis Galvin, Secretary of the Commonwealth of Massachusetts. The page title is "Lobbyist Registration & Reporting System". The user is logged in as "LobbyistTestAccount2".

Welcome, LobbyistTestAccount2

- Your 2022 registration is not on file with this office. If you are providing or receiving lobbying services, use the link below to complete your registration and submit online with your filing fee.
- Your next lobbyist disclosure report is due January 15, 2022.

Registration	Disclosure Reports
2022 Registration Not registered <ul style="list-style-type: none">Complete and submit	July - December 2021 Lobbyist report <ul style="list-style-type: none">Start report January - June 2021 Lobbyist report concluded 11-09-2021 <ul style="list-style-type: none">Amend this versionView or printPayment history

Select a year to access prior registration and disclosure reports:

[2022](#) [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.

>> 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**.

Lobbyist directly employed by a Client

Start on this Page

Lobbyists directly employed by a Client are required to enter information on the 5 forms displayed in the interactive navigation bar.

- Forms can be selected in any order.
- Report only those expenses or activities that were incurred or paid within the 6-month disclosure reporting period.
- The **link for incidental lobbying** displays at the beginning of the submission period.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - LobbyistTestAccount2 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start Registration Review 1 Operating Expenses 2 Activities and Bills 3 Meals, Travel, Entertainment 4 Additional Expenses 5 Campaign Contributions Review and Submit

What are my responsibilities?

For each registration year, any party providing or receiving lobbyist services must:

- register annually, and
- file two disclosure reports

Reporting period	Deadline
January - June	July 15
July - December	January 15

Registered lobbyists are required to file a disclosure report even if there is no client relationship for the reporting period.

Refer to MGL, Chapter 3, Sections 39 - 50 for disclosure reporting requirements.

General instructions for filing a report

- Review your registration
- Fill out your disclosure forms
- Review the information on your report
- When the submission period opens, use the link to certify and submit your final disclosure report

Important! Your report is not filed with the Lobbyist Division until the certify and submit step is completed

[Start here or select any link at the top of the screen](#)

[Click here for the incidental lobbying exception](#)

Late fees

If you miss the filing deadline, you will be charged daily late fees until the report is submitted and all late fees paid.

Online help

Select the online help link for detailed instructions.

Public search

The public cannot view your report until it is submitted and concluded.

Lobbyists directly employed by a Client

Reviewing your Registration

Update any information that changed during the registration year.

- Registration amendments must be submitted and concluded by the Lobbyist Division.
- You **will not be able to certify and submit** your report until your amendments are concluded.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start **Registration Review** 1 Operating Expenses 2 Activities and Bills 3 Meals, Travel, Entertainment 4 Additional Expenses 5 Campaign Contributions Review and Submit

The system sends status messages for this reporting period to the **email on this registration**. Contact the Lobbyist Division if you have questions about email addresses.

Change of account type
If you were retained by more than one client during this reporting period, contact the Lobbyist Division to update your account.

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

Review your 2021 registration

Review your Registration. These details are used to create your disclosure report. Update any information that is not accurate. You will be able to complete your report when your registration updates are reviewed and concluded by Lobbyist Division.

Lobbyist name: Lobbyist Test Account2
Business name: Company 1
Address: 456 Elm Street Ashland, MA 01721 US
Phone number: 508-555-2000
Primary email address: paulette.sayler@sec.state.ma.us
Secondary email addresses:
Agent type: Both
Employment declaration: I will be employed by a Client

Client name	Date employed	Date terminated
Client Test Account	1/1/2021	

* The lobbyist entity relationship is not registered

[Continue to next form](#)

[Amend Registration](#)

[Back to previous page](#)

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

Lobbyists directly employed by a Client

Form 1 – Operating Expenses

Provide as much information about each operating expense as possible.

- Do not report any expense that your Client is reporting on its Disclosure Report.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP
Start
Registration Review
1
2
3
4
5
Review and Submit

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

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

Operating Expenses

List any expense related to operating a business or office used for the purpose of providing or receiving lobbying services.

Entries must be incurred or paid within the 6-month reporting period

Instructions Use this form to list operating expenses. If you are a direct hire of your client, and your client has entered operating expenses on its disclosure form, you are not required to report any duplicate expenses. An expense should be reported by the individual or lobbyist entity that paid the expense.

- Enter the 6-month total for any item that applies.
- Do not use dollar signs or commas when entering an amount (Use 1234.56 to enter \$1,234.56).
- If a specific expense is not listed, enter it in the row marked **other**.

Back
Save
Save and continue to next form

Check here if there are no Operating Expenses to report

Date	Expense type	Recipient Name	Amount	Delete entry
<input type="text"/>	Advertising expenses ▼	<input type="text"/>	0.00	
<input type="text"/>	Advertising expenses ▼	<input type="text"/>	0.00	
<input type="text"/>	Advertising expenses ▼	<input type="text"/>	0.00	
<input type="text"/>	Advertising expenses ▼	<input type="text"/>	0.00	
<input type="text"/>	Advertising expenses ▼	<input type="text"/>	0.00	
Total:			\$ 0.00	

[Create additional entries](#)

Back
Save
Save and continue to next form

For Lobbyists directly employed by a Client

Form 2 – Bills and Activities

Use this form to report any activity that falls within the 6-month reporting period.

- This form does not require a date for each entry.
- Select your client from the dropdown list.
- If you cannot report compensation at the bill or activity level, check the “Report compensation by total” checkbox to report the total received from the selected client.
- Complete one entry for each bill or lobbying activity.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP

Start

Registration Review

1
Operating Expenses

2
Activities and Bills

3
Meals, Travel, Entertainment

4
Additional Expenses

5
Campaign Contributions

Review and Submit

Bills and Activities

Select a client from the drop down list:

- Select a House Bill, Senate Bill, or Executive from the drop-down list.
- If a House or Senate Bill is selected, enter the Bill Number. If a House or Senate Bill Number is entered, the Bill Title will auto-populate in the Bill Title box.
- Select Executive and identify the agency and subject matter if engaged in executive lobbying. Executive lobbying should include lobbying the Legislature where no bill or docket is involved.
- Enter the amount of compensation received from the client with respect to such lobbying services.
- Check the box if you cannot report compensation at the activity level.
- State a position for each bill or activity.
- Provide the name of the public official with whom the agent has a direct business association.

Check here if there are no Bills and Activities to report

Client: Client Test Account

Report compensation by total: \$

If you cannot report compensation at the bill or activity level (i.e. in-house or retainer), check this box to report the total received from this client. You are still required to list each bill or activity for this client.

Select Bill or Activity:	Enter Bill No:	<input type="text"/>	Enter Amount:
<input type="text" value="House Bill"/>	Enter Bill Title:	<input style="width: 90%;" type="text"/>	<input type="text" value="0.00"/>

Select Position: Direct business association with a public official: (Enter N/A if there is none) [clear text](#)

[Add another item for this client](#) **Total:** \$

Lobbyists directly employed by a Client

Form 3 – 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.

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 navigation links for HOME, DIRECTIONS, and CONTACT US. A search bar is also present. Below the header, the system title 'Lobbyist Registration & Reporting System' is displayed, along with the user's account information: 'Account Homepage - LobbyistTestAccount2' and the reporting period: 'Disclosure reporting period: July 1 — December 31, 2021'.

A progress bar indicates the current step: 1. Start, 2. Registration Review, 3. Operating Expenses, 4. Activities and Bills, 5. Meals, Travel, Entertainment (highlighted), 6. Additional Expenses, 7. Campaign Contributions, 8. Review and Submit.

The main content area is titled 'Meals, Entertainment, Travel' and includes the following text: 'Itemize any expenses for meals, travel, or entertainment that are related to lobbying efforts.' Below this, there are instructions: 'Enter date of the expense, and select event type.', 'Enter name of Payee, Vendor, or Location, and the amount.', 'Click on the link in Attendee List column to enter the required details for the individual entry.', and 'Select the link to continue adding more rows for additional entries.'

There are two informational boxes: one on the left stating 'Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.' and one on the right stating 'Entries must be incurred or paid within the 6-month reporting period.' Another box at the bottom right says 'If you have technical questions about the online reporting process, contact the Lobbyist Division at 617-727-9122.'

A checkbox is present: Check here if there are no MET Expenses to report

Date	Event Type	Payee, Vendor, or Location	Amount	Attendee List	Action
	Meal		0.00	Open	
Total:			\$ 0.00		

At the bottom, there are three buttons: 'Back to previous form', 'Save all changes', and 'Continue to next form'. A link 'Click here to add another row' is also visible.

Lobbyists directly employed by a Client

Form 3 – 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 - Attendee List

- Use a separate row to enter the name of each attendee.
- Identify any public officials and employees participating in or of any such event.

No.	Attendee Name	Action
1	<input type="text"/>	

[Click here to add another attendee](#)

Lobbyists directly employed by a Client

Form 4 – Additional Expenses

Itemize expenses that do not appear in any of the other filing 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”

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

○
ONLINE
HELP

○
Start

○
Registration
Review

①
Operating
Expenses

②
Activities
and Bills

③
Meals, Travel,
Entertainment

④
Additional
Expenses

⑤
Campaign
Contributions

○
Review
and
Submit

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

Additional Expenses

Use this form to itemize any other additional expenses that do not appear on the other disclosure forms. Additional expenses related to your lobbying activities might include items such as tickets, lodging expenses, gifts, or donations to charities.

- Enter the date expense was incurred or paid.
- Describe the purpose of the expense.
- Enter the name of the recipient or payee, and the amount.

Entries must be incurred or paid within the 6-month reporting period

Back
Save
Save and continue to next form

Check here if there are no Additional Expenses to report

Date of expense	Expense	Name of recipient or payee	Amount	Delete entry
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
Total:			<input type="text" value="\$ 0.00"/>	

Create additional entries
Back
Save
Save and continue to next form

Lobbyists directly employed by a Client

Form 5 – Campaign Contributions

Itemize any campaign contributions you have made.

- Enter the date of each contribution.
- Identify the recipient of each contribution.
- Enter the name of the office and district sought by the recipient.
- Enter the amount of each contribution.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

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

Campaign Contributions

Use this form to itemize any campaign contributions you have made.

- Enter the date of the contribution.
- Identify the recipient of the contribution.
- Enter the name of the office sought by the recipient.
- Then enter the amount of the contribution.

Entries must be incurred or paid within the 6-month reporting period

Back
Save
Save and continue to review screen

Check here if there are no Campaign Contributions to report

Date of contribution	Name of recipient (candidate, party, or political action committee)	Name of office sought by recipient	Amount of contribution	Delete entry
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
Total			\$ 0.00	

[Create additional entries](#)

Back
Save
Save and continue to review screen

Lobbyists directly employed by a Client

Review your Filing Forms

Select “Review and Submit” from the navigation bar or “Save and continue to review screen” to review your entries.

- To modify or correct any information, select the form from the navigation bar.
- Your incidental lobbying status can be reversed until the submission period is closed.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: July 1 — December 31, 2021

Review and submit your report

This is the information that has been saved to date on your disclosure reporting forms.

- Disclosure reports cannot be filed until submission period opens. Submission starts on January 01, 2022 for this reporting period.

[Click here to reverse an incidental status](#)

[Return to account homepage](#)

[Return to previous screen](#)

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

Failure to itemize the required information may cause the Lobbyist Division to reject your disclosure report.

Lobbyists directly employed by a Client

Certify, Sign, 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.

Account Homepage - LobbyistTestAccount2

Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account2 Disclosure reporting period: January 1 — June 30, 2021

ONLINE HELP Start Registration Review Operating Expenses Activities and Bills Meals, Travel, Entertainment Additional Expenses Campaign Contributions Review and Submit

Any report filed after the deadline will be charged daily late fees until submitted and all fees are paid.

Failure to itemize the required information may cause the Lobbyist Division to reject your report and may subject you to penalties.

Refer to Massachusetts General Laws, Chapter 3, Sections 39 - 50 for disclosure reporting requirements.

Submit your disclosure report

Electronic Signature *

Under the pains and penalties of perjury, I certify that I am Lobbyist Test Account2 of Company 1 and that the disclosure report I am submitting 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.

CERTIFY AND SUBMIT THIS REPORT

Back to previous page

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

Disclosure Report Status

The status reflected on your account homepage is “report submitted” until it is reviewed by the Lobbyist Division. The status then changes to show conclusion.

- A link to your next Disclosure Report will display on your account homepage when your current report is concluded.

Lobbyists employed by an Entity

*Note: These instructions are for **lobbyists employed by a Lobbying Entity**. If you are a lobbyist directly employed by a Client, you can find your instructions starting on page 3.*

Access your Disclosure Report from the link on your account homepage

You can access and fill out your filing forms, but you **cannot submit your Disclosure Report directly** to the Lobbyist Division. Your Entity will include your report in its filing.

- Access your Disclosure Report from the link on your homepage.
- Fill out your filing forms.
- Once your forms are saved, your data will display automatically on your entity's report.
- It is the Lobbyist Entity that is responsible for filing a report that covers all its lobbyists.

! Important

If your entity has already filed its report by the time you complete your forms, your data is held in saved status. To officially submit your data, your Entity must open and update its report with your data, and then resubmit it again to the Lobbyist Division.

! Incidental Lobbying

- A lobbyist that works for an Entity **may not file as incidental**.

Remember to save your changes before moving to another form

- **Save** – Select to save your entries, 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 entries

If you try to move to another form with unsaved entries, 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 does not save any data you entered since the last time you saved.

Error messages

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

Lobbyists employed by an Entity

Account Homepage

Select the “Start report” link from your account homepage.

The screenshot shows the account homepage for a user named 'LobbyistTestAccount1'. The header features a portrait of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Navigation links include HOME, DIRECTIONS, CONTACT US, and a search bar. The main heading is 'Lobbyist Registration & Reporting System'. The page is divided into three columns. The left column contains introductory text about the system and account security. The middle column, titled 'Welcome, LobbyistTestAccount1', lists key dates and actions: 'Your 2021 registration is concluded', 'Your lobbyist disclosure report for the July - December 2021 reporting period is not required', and 'Your next lobbyist entity disclosure report is due January 15, 2022'. Below this is a table with two columns: 'Registration' and 'Disclosure Reports'. The 'Registration' column shows '2021 Registration Concluded 12-20-2021' with links for 'Amend registration', 'View or print', 'Lobbyist Entity list', and 'Payment history'. The 'Disclosure Reports' column shows 'July - December 2021 Lobbyist report not required' and 'January - June 2021 Lobbyist report not required', both with 'Save report' links. A 'History' dropdown menu is set to 'Select'. At the bottom, there is a prompt to 'Select a year to access prior registration and disclosure reports:' with links for '2022' and '2021'. The right column provides contact information for the Lobbyist Division at 617-727-9122.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - LobbyistTestAccount1 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, LobbyistTestAccount1

- Your 2021 registration is concluded.
- Your lobbyist disclosure report for the July - December 2021 reporting period is not required. If this information is not accurate, contact the Lobbyist Division.
- Your next lobbyist entity disclosure report is due January 15, 2022.
- Your lobbyist disclosure report for the January - June 2021 reporting period is not required. Your registration date is: 11/08/2021. If this information is not accurate, contact the Lobbyist Division.

Registration	Disclosure Reports
2021 Registration Concluded 12-20-2021 <ul style="list-style-type: none">Amend registrationView or printLobbyist Entity listPayment history History: Select	July - December 2021 Lobbyist report not required Lobbyist Entity report <ul style="list-style-type: none">Save report January - June 2021 Lobbyist report not required Lobbyist Entity report <ul style="list-style-type: none">Save report

Select a year to access prior registration and disclosure reports:

2022 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.

>> 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.

Lobbyists employed by an Entity

Start on this page

Lobbyists employed by an Entity are required to enter information on the 4 forms displayed in the interactive navigation bar. Note that your Entity reports Operating Expenses.

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

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - LobbyistTestAccount1 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start Registration Review 1 Activities and Bills 2 Meals, Travel, Entertainment 3 Additional Expenses 4 Campaign Contributions Review and Submit

What are my responsibilities?
For each registration year, any party providing or receiving lobbyist services must:

- register annually, and
- file two disclosure reports

Reporting period **Deadline**

January - June	July 15
July - December	January 15

Registered lobbyists are required to file a disclosure report even if there is no client relationship for the reporting period.

Refer to MGL, Chapter 3, Sections 39 - 50 for disclosure reporting requirements.

General instructions for filing a report

- **Review your registration**
- **Fill out your disclosure forms**
- **Review the information on your report**
- **When the submission period opens, use the link to certify and submit your final disclosure report**
Important! Your report is not filed with the Lobbyist Division until the certify and submit step is completed

Start here or select any link at the top of the screen

Late fees
If you miss the filing deadline, you will be charged daily late fees until the report is submitted and all late fees paid.

Online help
Select the online help link for detailed instructions.

Public search
The public cannot view your report until it is submitted and concluded.

Lobbyists employed by an Entity

Reviewing your Registration

Update any information that changed during the registration year.

- Registration amendments must be submitted and concluded by the Lobbyist Division.
- Your Entity cannot certify and submit your Disclosure Report until your amendments are concluded.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start **Registration Review** 1 Activities and Bills 2 Meals, Travel, Entertainment 3 Additional Expenses 4 Campaign Contributions Review and Submit

The system sends status messages for this reporting period to the **email on this registration**. Contact the Lobbyist Division if you have questions about email addresses.

Change of account type
If you were retained by more than one client during this reporting period, contact the Lobbyist Division to update your account.

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

Review your 2021 registration

This registration is used to create your disclosure forms for this reporting period. Update any information that is not accurate.

Lobbyist name: Lobbyist Test Account1
Business name: Entity 1
Address: 123 Main Street Ashland, MA 01721 US
Phone number: 508-555-2000
Primary email address: paulette.sayler@sec.state.ma.us
Secondary email addresses:
Agent type: Both
Employment declaration: I will be employed by a Lobbyist Entity

* The client relationship is not registered

Lobbyist Entity name	Date employed	Date terminated
Entity Test Account	1/1/2021	

Continue to next form

Amend Registration

Back to previous page

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

Lobbyists employed by an Entity

Form 1 – Bills and Activities

Use this form to report any activity that falls within the 6-month reporting period.

- This form does not require a date for each entry.
- Select your client from the dropdown list.
- If you cannot report compensation at the bill or activity level, check the “Report compensation by total” checkbox to report the total received from the selected client.
- Complete one entry for each bill or lobbying activity.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

Bills and Activities Lobbyist: Lobbyist Test Account1

Select a client from the drop down list:
Client Test Account

- Select a House Bill, Senate Bill, or Executive from the drop-down list.
- If a House or Senate Bill is selected, enter the Bill Number. If a House or Senate Bill Number is entered, the Bill Title will auto-populate in the Bill Title box.
- Select Executive and identify the agency and subject matter if engaged in executive lobbying. Executive lobbying should include lobbying the Legislature where no bill or docket is involved.
- Enter the amount of compensation received from the client with respect to such lobbying services.
- Check the box if you cannot report compensation at the activity level.
- State a position for each bill or activity.
- Provide the name of the public official with whom the agent has a direct business association.

Check here if there are no Bills and Activities to report

Client: Client Test Account

Report compensation by total: \$ 0.00

If you cannot report compensation at the bill or activity level (i.e. in-house or retainer), check this box to report the total received from this client. You are still required to list each bill or activity for this client.

Select Bill or Activity: Enter Bill No: Enter Amount:
House Bill Enter Bill Title:

Select Position: Direct business association with a public official: (Enter N/A if there is none)
Support [clear text](#)

[Add another item for this client](#) **Total:** \$ 0.00

[Back](#) [Save](#) [Save and continue to next form](#)

Lobbyists are required to report all Bills, or a description of legislation and/or other governmental activity worked on to promote, oppose, or influence within this 6-month reporting period.

Contact the Lobbyist Division at 617-727-9122 if you have questions about the online reporting process.

Lobbyists employed by an Entity

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.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - LobbyistTestAccount1 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start Registration Review 1 Activities and Bills 2 Meals, Travel, Entertainment 3 Additional Expenses 4 Campaign Contributions Review and Submit

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

Meals, Entertainment, Travel

Lobbyist Entity: Entity Test Account

Itemize any expenses for meals, travel, or entertainment that are related to lobbying efforts.

- Enter date of the expense, and select event type.
- Enter name of Payee, Vendor, or Location, and the amount.
- Click on the link in Attendee List column to enter the required details for the individual entry.
- Select the link to continue adding more rows for additional entries.

Entries must be incurred or paid within the 6-month reporting period

If you have technical questions about the online reporting process, contact the Lobbyist Division at 617-727-9122

Check here if there are no MET Expenses to report

Date	Event Type	Payee, Vendor, or Location	Amount	Attendee List	Action
	Meal		0.00	Open	
Total:			\$ 0.00		

[Click here to add another row](#)

Back to previous form Save all changes Continue to next form

Lobbyists employed by an Entity

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 - Attendee List

- Use a separate row to enter the name of each attendee.
- Identify any public officials and employees participating in or of any such event.

No.	Attendee Name	Action
1	<input type="text"/>	

[Click here to add another attendee](#)

[Save all entries](#) [Close Attendee List](#)

Lobbyists employed by an Entity

Form 3 – Additional Expenses

- Itemize expenses that do not appear in any of the other filing 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”

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

ONLINE
HELP

Start

Registration
Review

1
Activities
and Bills

2
Meals, Travel,
Entertainment

3
**Additional
Expenses**

4
Campaign
Contributions

Review
and
Submit

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

Additional Expenses

Lobbyist Entity: Entity Test Account

Use this form to itemize any other additional expenses that do not appear on the other disclosure forms. Additional expenses related to your lobbying activities might include items such as tickets, lodging expenses, gifts, or donations to charities.

- Enter the date expense was incurred or paid.
- Describe the purpose of the expense.
- Enter the name of the recipient or payee, and the amount.

Entries must be incurred or paid within the 6-month reporting period

Back
Save
Save and continue to next form

Check here if there are no Additional Expenses to report

Date of expense	Expense	Name of recipient or payee	Amount	Delete entry
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	X
Total:			<input type="text" value="\$ 0.00"/>	

Create additional entries

Back
Save
Save and continue to next form

Lobbyists employed by an Entity

Form 4 – Campaign Contributions

Itemize any campaign contributions you have made.

- Enter the date of each contribution.
- Identify the recipient of each contribution.
- Enter the name of the office and district sought by the recipient.
- Enter the amount of each contribution.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

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

Campaign Contributions

Lobbyist Entity: Entity Test Account

Use this form to itemize any campaign contributions you have made.

- Enter the date of the contribution.
- Identify the recipient of the contribution.
- Enter the name of the office sought by the recipient.
- Then enter the amount of the contribution.

Entries must be incurred or paid within the 6-month reporting period

Back
Save
Save and continue to review screen

Check here if there are no Campaign Contributions to report

Date of contribution	Name of recipient (candidate, party, or political action committee)	Name of office sought by recipient	Amount of contribution	Delete entry
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	
Total			\$ 0.00	

[Create additional entries](#)

Back
Save
Save and continue to review screen

Lobbyists employed by an Entity

Review and add your details to your Entity's Report

When you are finished with your filing forms, you are ready to add your disclosure reports to your Entity's Disclosure Report. Your entity is responsible for submitting your filing forms to the Lobbyist Division.

- Selecting the “save” button will automatically upload your forms to your entity's disclosure report.
- After saving, your entity's Disclosure Report will contain all of the details you provided on your reporting forms.

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account1 Disclosure reporting period: July 1 — December 31, 2021

ONLINE HELP Start Registration Review 1 Activities and Bills 2 Meals, Travel, Entertainment 3 Additional Expenses 4 Campaign Contributions Review and Submit

Disclosure reporting is governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50.

Failure to itemize the required information may cause the Lobbyist Division to reject your disclosure report.

Review your report

This is the information that has been saved to date on your disclosure reporting forms.

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

[Return to account homepage](#)

[Lobbyist Entity Registration Profile](#)

Disclosure Report Status

Status is reflected on your account homepage as “saved” until it your Entity's report is reviewed by the Lobbyist Division.

- The status then changes to show conclusion.
- Your Entity's report must be fully concluded before your account homepage is updated with a “concluded” status.