

User Guide

Lobbyist Registration & Reporting System

DISCLOSURE REPORTING INSTRUCTIONS

Filing a Disclosure Report – **Lobbyist Entities**

Entities report the required information on 5 filing forms:

- Operating Expenses and Salaries
- Activities and Bill Numbers
- Meals, Travel, Entertainment
- Additional Expenses
- Campaign Contributions

How it works for a lobbyist who is employed by an entity:

You can fill out your disclosure report (the link is on your account homepage). However, your report can only be certified and submitted by your entity. Once your report is completed and saved, your information will automatically be moved to your entity's Disclosure Report.

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

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

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

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**.

Lobbyist Entities

Account Homepage

Select the “start report” link from your account homepage:

The screenshot shows the account homepage for 'EntityTestAccount' in the Lobbyist Registration & Reporting System. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a search bar and navigation links (HOME, DIRECTIONS, CONTACT US). Below the header, the page title is 'Lobbyist Registration & Reporting System'. The main content area is divided into three columns. The left column contains introductory text about the system and account security. The middle column, titled 'Welcome, EntityTestAccount', lists account status: '2022 Registration Not registered' with a 'Complete and submit' link, and 'Disclosure Reports' for 'January - June 2021' (with a 'Start report' link) and 'July - December 2021' (with 'Link not available'). Below this is a 'Select a year to access prior registration and disclosure reports:' section with links for '2022' and '2021'. The right column provides contact information for the Lobbyist Division at 617-727-9122 and explains that registration and disclosure reporting are governed by Mass. General Laws, Chapter 3, Sections 39 through 50.

>> 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 Entities

Start on this Page

Lobbyist entities are required to complete operating expenses and salaries, and a set of 4 forms for each lobbyist employed.

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

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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

What are my responsibilities?

Any party providing or receiving lobbyist services must register annually and file two disclosure reports for the registration year.

Report 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.

Lobbyist Entities

Reviewing your Registration

Update any information that changed during the registration year.

- Amendments to the registration information may not be done in the Disclosure Report.
- Registration amendments must be submitted to the Lobbyist Division for review.
- Once these amendments are concluded, you will received a confirmation.
- You can then certify and submit your report.
- Note that subagents are now referred to as lobbyists.

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Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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

Lobbyist Registration & Reporting System

The system will communicate status messages for this reporting period to the **email address on this registration.**

Contact the Lobbyist Division at 617-727-9122 if you have any questions about email addresses.

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

Review your 2021 registration records

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.

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

Business name:	Entity Test Account		
Authorizing officer, title:	John Smith President		
Address:	123 Main Street Ashland, MA 01721 US		
Phone number:	508-781-3000		
Primary email address:	paulette.sayler@sec.state.ma.us		
Secondary email addresses:			
	Client name	Date employed	Date terminated
	Client Test Account	1/1/2021	

Lobbyist name	Employment date	Termination date
Lobbyist Test Account1	01/01/2021	
Test Lobbyistc	01/01/2021	

[Continue to next form](#)

[Amend Registration](#)

[Back to previous page](#)

Lobbyist Entities

Form 1 – Operating Expenses and Salaries

Provide as much information about your operating expenses as possible.

- Enter the amount of compensation paid next to the name of your lobbyists
- Select the type of expense from expense type dropdown.

Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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Review and Submit

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

Instructions This form is used to report operating expenses, and salaries paid to your lobbyists.

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

Operating Expenses and Lobbyist Salaries

List expenses related to operating a business or office used to provide or receive lobbying services. You are also required to report all compensation paid to lobbyists during the reporting period. Entries must be incurred or paid within the 6-month reporting period.

Salaries Paid by the Lobbyist Entity to its Lobbyist(s).

Forms are created from registration records on file for the relevant reporting period and show any lobbyist employed for this period.

- Enter salary expenses paid or incurred next to the lobbyist name.

Check here if there are no Salaries to report

Name of lobbyist	Amount
Lobbyist Test Account1	0.00
Test Lobbyistc	0.00
Total salaries	\$ 0.00

Your disclosure statement must contain the amount of salary, compensation, and/or any retainer paid to any lobbyist employed during the reporting period.

Use the text box below to provide an explanation if the lobbyist compensation amount reported by the lobbyist entity on this form does not match the total lobbyist compensation reported on the bills and activities form.

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Save and continue to next form

Operating Expenses

Use this form to list operating expenses.

- 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**.

Check here if there are no Operating Expenses to report

Date	Expense type	Recipient Name	Amount	Delete entry
	Advertising expenses ▼		0.00	
	Advertising expenses ▼		0.00	
	Advertising expenses ▼		0.00	
	Advertising expenses ▼		0.00	
	Advertising expenses ▼		0.00	
Total:			\$ 0.00	

[Create additional entries](#)

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Save
Save and continue to next form

Lobbyist Entities

Using the Menus

Before filling out each form, a pop-up displays:

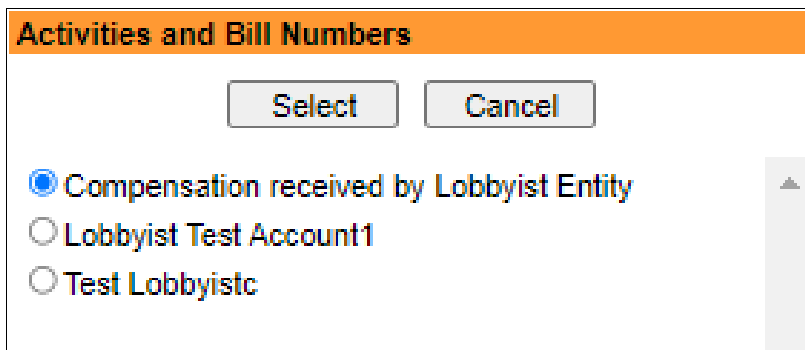
- If you are reporting on behalf of the Entity, select that radio button
- If you are reporting for a Lobbyist who works for your Entity, select the radio button for the specific lobbyist

The system will display the appropriate fields.

Pop-ups will display for:

- Bills and Activities (Entity or Lobbyist)
- Meals, Entertainment, Travel (Entity or Lobbyists)
- Additional Expenses (Entity or Lobbyists)
- Campaign Contributions (Lobbyists)

Sample Pop-up that displays before the Bills and Activities form



Activities and Bill Numbers

Select Cancel

Compensation received by Lobbyist Entity

Lobbyist Test Account1

Test Lobbyistc

Lobbyist Entities

Form 2 – Activities and Bill Numbers

If you select “Compensation received by the Entity” from the pop-up, this screen will display:

- Report compensation for each Client
- Select the Client from the drop down menu
- Enter the amount the Client paid the Entity for the reporting period
- If there is no compensation to report, check the box

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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

Compensation received by Lobbyist Entity

Compensation paid by the client should be reported either as an amount received by the lobbyist entity, or as an amount received by the individual lobbyist. The same payment should not be reported in both sections

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

Check here if there are no Client Compensations to report

Client: Client Test Account

Report compensation by total: \$ 0.00

Check this box to report compensation received from this client.

Back Delete 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.

Lobbyist Entities

Form 2 – Activities and Bill Numbers

If you select a specific lobbyist from the pop-up, this screen will display:

- Click on a lobbyist and then select the client.
- Once selected, fields will display.
- Complete one entry for each bill number or lobbying activity.
- To report total compensation paid by a client, select the entity from the menu and select the client from the dropdown. Check “Report compensation by total” and enter the amount.

Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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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](#)

Lobbyist Entities

Form 3 – Meals, Travel, Entertainment

Report entries in this category by lobbyist, or as a general expense. Itemize any meals, travel, or entertainment expenses that are part of your lobbying activity.

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

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Secretary of the Commonwealth of Massachusetts

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Lobbyist Registration & Reporting System

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Expense Form

Use the **Entity Form** when the expense is incurred by the Entity, and not a specific Lobbyist.

Use the **Lobbyist Form** when the expense is related to the specific lobbyist.

Meals, Entertainment, Travel

Expenses for Lobbyist Entity

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

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

Lobbyist Entities

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](#)

Lobbyist Entities

Form 4 – Additional Expenses

Report entries in this category by lobbyist or as a general expense for the entity.

- Itemize expenses that do not appear in any of the other forms.
- Enter the date the expense was incurred or paid.
- Describe the purpose of the expense.
- Enter the name of the recipient or payee and the amount.
- Note that subagents are now referred to as lobbyists.

Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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Review and Submit

Lobbyist forms

- Enter required information on the lobbyist's form when the expense is related to the specific lobbyist.

General expenses for lobbyist entity

- Use this form when the expense is incurred on behalf of the lobbyist entity, and not a specific lobbyist.

Additional Expenses

Expenses for Lobbyist Entity

This form allows you to itemize any other additional expenses that do not appear on the other disclosure forms. Additional expenses related to the lobbyist's or the lobbyist entity's 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

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

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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"/>	0.00	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	X
Total:			\$ 0.00	

Back
Save
Save and continue to next form

[Create additional entries](#)

Lobbyist Entities

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 — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

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Review and Submit

Instructions Report contributions by lobbyist:

- Fill out a form for each lobbyist.
- Enter the required information for the contribution.
- Select save before moving to another form.

Campaign Contributions

Lobbyist: Lobbyist Test Account1

Use this form to itemize contributions for this reporting period.

- 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	

[Back](#)

[Save](#)

[Save and continue to review screen](#)

[Create additional entries](#)

Lobbyist Entities

Review your Filing Forms

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

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

Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: January 1 — June 30, 2021

Lobbyist Registration & Reporting System 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 and submit your report

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

- The submission period is open. Certify and submit your report before the deadline to avoid late fees.

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

[Proceed to the certify and submit screen](#)

[Return to account homepage](#)

Lobbyist Entity Registration Profile			
Business name	Entity Test Account		
Authorizing officer	John Smith	Title	President
Address	123 Main Street, Ashland MA 01721, US		
Primary email	paulette.sayler@sec.state.ma.us	Phone	508-781-3000
Secondary email		Electronic Signature	

Lobbyist Entities

Certify and submit your Report

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

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

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 (HOME, DIRECTIONS, CONTACT US). Below the header, a progress bar indicates the current step: '1 Operating Expenses and Salaries'. The progress bar includes steps: ONLINE HELP, Start, Registration Review, 1 Operating Expenses and Salaries, 2 Activities and Bills, 3 Meals, Travel, Entertainment, 4 Additional Expenses, 5 Campaign Contributions, and Review and Submit. The main content area is titled 'Submit your disclosure report' and includes a text box for 'Electronic Signature: *', a checkbox for certification, and a 'CERTIFY AND SUBMIT THIS REPORT' button. A 'Back to previous page' button is also present. A blue box on the right contains contact information for the Lobbyist Division. A gray box on the left provides information about late fees and penalties.

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

Lobbyist Registration & Reporting System

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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: *

I certify that I am John Smith of Entity Test Account and that the report I am submitting is complete and accurate for the current disclosure period. I further understand that any violation of the lobbying laws is punishable by civil and/or criminal penalties.

CERTIFY AND SUBMIT THIS REPORT

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