

User Guide

Lobbyist Registration & Reporting System

DISCLOSURE REPORTING INSTRUCTIONS

Filing a Disclosure Report – **Clients**

Clients report the required information on 3 filing forms:

- Operating Expenses and Lobbyist Salaries
- Meals, Entertainment, Travel
- Additional Expenses

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.

- Reports must be submitted within 15 days after the 6-month reporting period.
- Once submitted, your report is reviewed and concluded, or returned as rejected.
- If rejected, you will receive details for additional information and an explanation.
- If concluded, you will receive a confirmation.

Remember to save your changes before moving to another form

- **Save** – Select to save your data, 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 data!

If you try to move to another form with unsaved changes, 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 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.**

Client Account Homepage

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

The screenshot shows the ClientTestAccount homepage for the Lobbyist Registration & Reporting System. 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 bar. The main content area is titled "Lobbyist Registration & Reporting System" and contains several sections:

- Welcome, ClientTestAccount**: A list of bullet points providing information about the user's registration status and reporting requirements for 2021 and 2022.
- Registration**: A section with a sub-header "2022 Registration" and a status of "Not registered", with a link to "Complete and submit".
- Disclosure Reports**: A section with sub-headers for "January - June 2021" (with a "Start report" link) and "July - December 2021" (with "Link not available").
- Registration and disclosure reporting**: A section explaining that reporting is governed by Mass. General Laws, Chapter 3, Sections 39 through 50.
- Contact the Lobbyist Division**: A section providing contact information for assistance, including a phone number and a statement that the office can answer questions and provide technical assistance.

At the bottom of the main content area, there is a section titled "Select a year to access prior registration and disclosure reports:" with links for "2022" and "2021".

>> 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**.

Start on this Page

Clients are required to enter information on 3 forms:

- 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.

Massachusetts Lobbyist Registration

Not secure | <https://sec-web1-mo/LobbyistWeb/Disclosure/Client...>

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Lobbyist Registration & Reporting System

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

ONLINE HELP Start Registration Review 1 Operating Expenses and Salaries 2 Meals, Travel, Entertainment 3 Additional Expenses Review and Submit

Your 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

Important! If you are the client and act as your own lobbyist, **you are required to file both reports** for the same reporting period: one report as the lobbyist, and one as the client.

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](#)

You can also start by selecting 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.

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

Reviewing your Registration

Update any information that changed during the registration year.

- 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 Disclosure Report.

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Lobbyist Registration & Reporting System

Disclosure Report — Client Test Account
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The lobbyist online system will communicate status messages for this reporting period to any **email address listed on this registration.**

If you have questions about email addresses, contact the Lobbyist Division at 617-727-9122.

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 if you have technical questions about the online reporting process

Company name: Client Test Account

Authorizing officer, title: test Smith President

Address: 888 Elm St Ashland, MA 01721 US

Phone number: 508-555-2000

Primary email address: paulette.sayler@sec.state.ma.us

Secondary email addresses:

Business interest: Automotive Industry

Type	Name	Employed	Terminated	Lobbyist or Entity's Efforts
Lobbyist	Lobbyist Test Account2	01/01/2021		test
Lobbyist Entity	Entity Test Account	01/01/2021		test

Continue to next form

Amend registration

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Form 1 – Operating Expenses and Salaries

Report all compensation you paid to lobbyists or lobbyist entities during the reporting period.

- Provide as much information about each operating expense as possible.
- The system allows you to itemize each operating expense.

Lobbyist Registration & Reporting System

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

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 or lobbyist entities.

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 any expense 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 or lobbyist entities during the reporting period.

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

Salaries Paid by the Client to its Lobbyist or Lobbyist Entity

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

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

Check here if there are no Salaries to report

Name of lobbyist	Amount
Lobbyist Test Account2	0.00
Entity Test Account	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.

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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
<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](#)

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Save and continue to next form

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

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Lobbyist Registration & Reporting System

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

ONLINE HELP Start Registration Review **1** Operating Expenses and Salaries **2** Meals, Travel, Entertainment Additional Expenses Review and Submit **3**

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

Meals, Entertainment, Travel

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

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 style="width: 90%;" type="text"/>	

[Click here to add another attendee](#)

Save all entriesClose Attendee List

Form 3 – Additional Expenses

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.
- To add more rows, select “Create additional entries.”

Lobbyist Registration & Reporting System

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

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ONLINE HELP

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Registration Review

①
Operating Expenses and Salaries

②
Meals, Travel, Entertainment

③
Additional Expenses

○
Review and Submit

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

Additional Expenses

This form allows you to itemize any other additional expenses that do not appear on any of 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

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

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Save and continue to review screen

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	
<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](#)

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Save
Save and continue to review screen

Review your Filing Forms

Select “Review and Submit” from the navigation bar or “Save and continue to review screen” to review the data you entered on each form.

- 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 screen.
- If you are not ready to submit your disclosure report, select “**Return to account homepage;**” any information you entered 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 — Client 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.

Proceed to the certify and submit screen

Return to account homepage

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

Client Registration Profile			
Business name	Client Test Account		
Authorizing officer	test Smith	Title	President
Address	888 Elm St, Ashland MA 01721, US		
Primary email	paulette.sayler@sec.state.ma.us	Phone	508-555-2000
Secondary email		Electronic Signature	
Business category	Automotive Industry		

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 user interface for 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" and the user is logged in as "ClientTestAccount". A progress bar indicates the current step: "1 Operating Expenses and Salaries". The reporting period is "January 1 — June 30, 2021".

Lobbyist Registration & Reporting System

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.

Save or submit your report

Electronic Signature: *

I certify that I am test Smith of Client 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 technical questions about the online disclosure reporting process.