

# User Guide

## Lobbyist Registration & Reporting System

### Details for a Lobbyist Registration

An **individual lobbyist** represents only one client, or is a part of any group, company, or organization whose main business is providing lobbyist-type services.

An individual lobbyist may also be a salaried employee of the client he or she represents. For example, an employee hired by an organization (i.e., union or trade group) is asked to provide lobbying services as part of his or her job duties. In this case, the employee is the lobbyist and the organization is the client. Both must register, and both are responsible for filing disclosure reports for that registration year.

### Meeting the requirements of the educational seminar

*All lobbyists are required to complete an educational seminar (online or in-person) **each year** prior to the annual registration period.* If there is no in-person seminar scheduled for the current registration year, you must read the online instructional materials and certify compliance on your registration form. The link to the online seminar is available on the sign-in screen.

### This document covers the following topics:

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

After you complete and submit your registration, the Lobbyist Division will review for conclusion. If additional details are required, you will be contacted through the primary email address provided on your registration. Once it is concluded, your registration can be edited or updated at any time.

## Filing dates and registration fee

Lobbyists pre-register in December for the upcoming registration year.

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

**Annual filing fee** – \$100

## New accounts register during the year

If you have just created a **new account**, you are required to register and pay for the full year regardless of the month in which you register. When you create a new account, the system generates a registration status message and link on your account homepage.

## Email communication

**Account email address:** This address is used when you initially create your account. Your account user name and temporary password are emailed to this address.

**Registration email address:** The email address on your annual registration is used to communicate lobbyist requirements and important legal filing notices.

- You can update your email address by selecting “update registration” from your account homepage.

**Primary email address used for user names and passwords:** Requests for user names and passwords are emailed to the **primary email address** for the most current registration year.

*If you have questions about email addresses, or you think you are not receiving email notifications, contact the Lobbyist Division for assistance.*

## System passwords

Your account is secure and can only be accessed by your **user name and password**.

### User Names

The system creates a unique user name when you set up your account, and sends it to you in a confirmation email. You cannot change your user name.

User names are created using the first initial, last name, followed by six digits:

- User name for Lobbyist “Mike Smith”: msmith948110
- User name for Lobbyist “Alexander Timothy Johnson”: alexandertimothyjohn833001

### Passwords

- You create your own password from a combination of letters, numbers, and special characters. You can change your password using the “change password” link.

## Retrieving lost or forgotten credentials

If you cannot locate your user name or password, select the links on the main sign-in screen.

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

## Registration Sequence

### A lobbyist registers first before the client or lobbyist entity

The sequence of registration creates a relationship in the database between the lobbyist and client or between the lobbyist and lobbyist entity. Once the lobbyist application is concluded, the registration is entered into the lobbyist system database. The lobbyist's client or lobbyist entity is then able to complete and submit its registration.

- During registration, **the client or lobbyist entity** uses a search tool to locate their registered lobbyist from the database.
- If the lobbyist is not registered, the client or lobbyist entity cannot complete its registration.



*>> The screen images displayed throughout the online help documents do not represent accurate reporting and submission dates, or actual lobbyists, lobbyist entities, or clients. The information contained within these sample screens is intended for **instructional purposes** only.*

## Lobbyist instructions

Sign in to the system through the main page:

- You'll be directed to your **account homepage**.
- Select the **“complete and submit”** link to start.



## Preparing and submitting a registration:

The first page provides general instructions for completing your registration.

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

**Lobbyist Registration & Reporting System**  
Lobbyist Registration | Registration year: 2013

Start Enter Data Review Pay Submit

**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.

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**

Complete all required areas of the form. When you are finished, review your registration and check the certification box. The final step is paying for and submitting your registration.

- Lobbyists register before clients** Your registration must be concluded and in the lobbyist system database before your client can finalize its registration.
- Business name** If you are a direct employee of the organization you are lobbying for (e.g. trade group, union), enter that company's name in the business field. If you are not, enter your name in both fields.
- 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.

Registration Form

Back to account homepage

William Francis Galvin, Secretary of the Commonwealth of Massachusetts  
Terms and Conditions

## Complete the registration form

- **Lobbyist business name** - If you are the direct employee of the organization you are lobbying for, enter that company's name in the business field. If you are not a direct employee, enter your name in both fields.
- **Educational requirement** - You are required to check the box to indicate you have attended an in-house lobbyist educational seminar, or studied the online materials.
- **Employment Declaration** - You are required to declare whether you are employed by a client or a lobbyist entity.

Select **save and continue**. (If you miss a required field, the system generates an error message).

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links: 'Account Homepage - bsmith315957', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. Below this is a progress bar for 'Lobbyist Registration | Registration year: 2021' with five steps: 'Start', 'Enter Data', 'Review', 'Pay', and 'Submit'. The 'Enter Data' step is currently active.

The main form is titled 'Lobbyist registration form \* Complete all required fields'. It contains the following fields and options:

- Name (first, middle, last): Three text input fields.
- Business name: One text input field.
- Street address: One text input field.
- Suite, floor, apartment: One text input field.
- City, state, zip code: Three text input fields.
- Country: A dropdown menu set to 'United States'.
- Area code, phone number: One text input field.
- Primary email address: One text input field containing 'paulette.sayler@sec.state.ma.us'.
- Secondary email addresses: One text input field.
- Agent type: Radio buttons for 'Legislative', 'Executive', and 'Both'.
- Employment declaration: Radio buttons for 'I will be employed by a Lobbyist Entity' and 'I will be employed by a Client'.

Below the form, there are two sections:

- Lobbyist Educational Seminar**: A link to access online educational documents, with contact information for the Lobbyist Division (617-727-9122).
- Registration completion options**: A checkbox for 'I have completed the Lobbyist Educational Seminar.' Below this are two buttons: 'SAVE AND CONTINUE' (grey) and 'Back to account homepage' (blue).

A red-bordered box contains a warning: 'All executive and legislative agents must complete the Lobbyist Educational Seminar prior to registration.'

## Certify the educational requirement

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

The screenshot shows the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links: 'Account Homepage - Item#0315937', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. The main heading is 'Lobbyist Registration & Reporting System' with a sub-heading 'Lobbyist Registration | Registration year: 2021'. A progress bar below the heading shows five steps: 'Start', 'Enter Data', 'Review', 'Pay', and 'Submit'. The 'Enter Data' step is currently active.

The 'Lobbyist registration form' is displayed with the instruction 'Complete all required fields'. The form fields include:

- Name (first, middle, last): Three text input fields.
- Business name: One text input field.
- Street address: One text input field.
- Suite, floor, apartment: One text input field.
- City, state, zip code: Three text input fields.
- Country: A dropdown menu set to 'United States'.
- Area code, phone number: One text input field.
- Primary email address: One text input field containing 'paulette.saylor@sec.state.ma.us'.
- Secondary email addresses: One text input field.
- Agent type: Radio buttons for 'Legislative', 'Executive', and 'Both'.
- Employment declaration: Radio buttons for 'I will be employed by a Lobbyist Entity' and 'I will be employed by a Client'.

Below the form, there are two checkboxes:

- I have completed the Lobbyist Educational Seminar.
- The client relationship is not registered.
- The lobbyist entity relationship is not registered.

At the bottom left, there is a link for 'Lobbyist Educational Seminar' with instructions: 'Select this link to access the online educational documents. If you have questions about the educational requirement, contact the Lobbyist Division at 617-727-8122.'

At the bottom right, there are two buttons: 'SAVE AND CONTINUE' (grey) and 'Back to account homepage' (blue). A red warning box states: 'All executive and legislative agents must complete the Lobbyist Educational Seminar prior to registration.'

- If you select **“back to account homepage”** at this step, any data you entered will be saved.

## Review and certify

When you are satisfied with your registration, check the **certification box** and **“agree and continue”** to move to the payment screens.

- If you select **“save for later,”** your data is saved at this step, but your registration is not submitted.
- The system generates an alert that your registration filing and payment must be received by the Lobbyist Division **within 5 days** to meet the registration requirements of the lobbying laws.

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Account Homepage - ba148315937 Online help Contact the Lobbyist Division Change password Log out

### Lobbyist Registration & Reporting System

Lobbyist Registration | Registration year: 2021

Start Enter Data Review 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

\* The client relationship is not registered  
\* 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**

## Make a registration payment

Select “**pay online**” to make an immediate payment using a credit card or e-check.

- The system will direct you to the Secretary of the Commonwealth’s website to complete your online payment. An expedited fee is added when you make your payment.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, it features 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 indicates the current step is 'Pay' in a five-step process (Start, Enter Data, Review, Pay, Submit). The 'Pay' step is highlighted with an orange circle. 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 (\$1,000, plus \$100), Entity (for each sub-agent registered), and Client (\$100 for each lobbying relationship registered). The 'Payment is now due:' section shows a table with columns for Reason, Account, and Amount, listing a 'Filing fee for registration of individual lobbyist' for a 'Test Account Lobbyist' totaling \$100.00. Below this table is a 'Select a payment method:' section with a 'Pay Online' button and a note that an expedited fee is added at the time of payment. There is also an 'Account homepage' button. The 'For assistance' section provides contact information for the Lobbyist Division and mentions that registration and disclosure reporting are governed by Massachusetts General Laws, Chapter 3, Sections 39 - 50. At the bottom of the page, there is a footer with the Secretary's name and a link to 'Terms and Conditions'. The browser's taskbar at the bottom shows 'Done', 'Local intranet', and a zoom level of 100%.

**Registration Filing Fees**

Lobbyist - \$100

Lobbyist - \$1,000, plus \$100

Entity - for each sub-agent registered

Client - \$100 for each lobbying relationship registered

**Disclosure Report late fees**

\$50 / Up to 20 days day

\$100 / 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	Account	Amount
Filing fee for registration of individual lobbyist:	Test Account Lobbyist	\$100.00
<b>Total amount due:</b>		<b>\$100.00</b>

**Select a payment method:**

**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.

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

## Confirmation

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

- Your registration will be reviewed for conclusion.
- Select **“account homepage”** to view your current registration status.



## Registration concluded

The account homepage reflects that your registration was reviewed and concluded by the Lobbyist Division.

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

The screenshot shows a web browser window displaying the account homepage for the Massachusetts Lobbyist Registration & Reporting System. The page header features a profile picture of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. A navigation menu includes links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. The main content area is titled "Lobbyist Registration & Reporting System" and includes a welcome message for the user "LobbyistTestAccount".

**Welcome, LobbyistTestAccount**

- Your 2012 registration is concluded.
- Your client is required to add you to its registration. Contact that party directly, or the Lobbyist Division for assistance.
- Your next disclosure report is due January 15, 2013.
- Your disclosure report for the January - June 2012 reporting period is not required. Your registration date is: 11/19/2012. If this information is not accurate, contact the Lobbyist Division.

Registration	Disclosure Reports
<b>2012 Registration Concluded</b> <b>Client relationship incomplete</b> <ul style="list-style-type: none"><li>• <a href="#">Update registration</a></li><li>• <a href="#">View or print a copy</a></li><li>• <a href="#">Payment history</a></li></ul>	<b>July - December 2012</b> <ul style="list-style-type: none"><li>• <a href="#">Start report</a></li></ul> <b>January - June 2012</b> Report not required

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

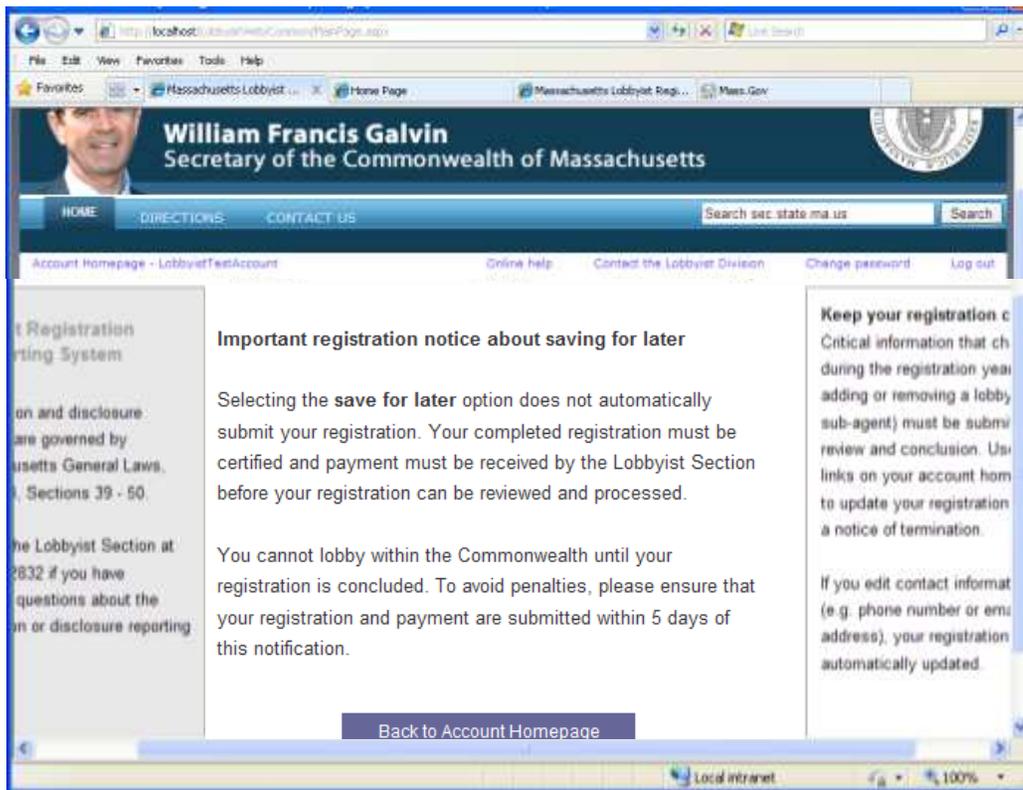
Contact the Lobbyist Division at 617-727-9122 if you require account assistance. This office can answer questions about using the online system, or provide technical assistance with the registration or disclosure reporting process.

Prior to registration, all executive and legislative agents are required to complete the Lobbyist Educational Seminar.

## Saving a registration

The system generates a saved-only status screen.

- The account homepage reflects that your registration is submitted but it **cannot be reviewed** until you **complete and submit** your registration with payment.



## Payment Pending Status

Your registration cannot be reviewed and concluded if it is in payment pending status.

- Click on the link to navigate to the payment screen.

