

User Guide

Lobbyist Registration & Reporting System

Details for a Client Registration

A **client** is the individual or organization that employs a lobbyist entity or an individual lobbyist. A client is any person, corporation, partnership, association, or other entity that contracts with another person, corporation, partnership, association, or other entity to receive lobbying services.

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

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

This document covers the following topics:

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

Filing dates and registration fee

Clients pre-register in December for the upcoming registration year:

Annual registration period – December 1 through 15

Annual filing fee – \$100 for each lobbyist entity or lobbyist

New accounts register during the year

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

Email communication

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

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

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

Primary email address used for user name and password requests. User names and passwords are emailed to the **primary email address** on the current registration. *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 in a confirmation email. You cannot change your user name.

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

- User name for Client “The Chauncey Enterprise LLC:” Thechaunceygroupente721388
- User name for Client “Pacific:” Pacific477399

Passwords

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

Retrieving lost or forgotten credentials

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

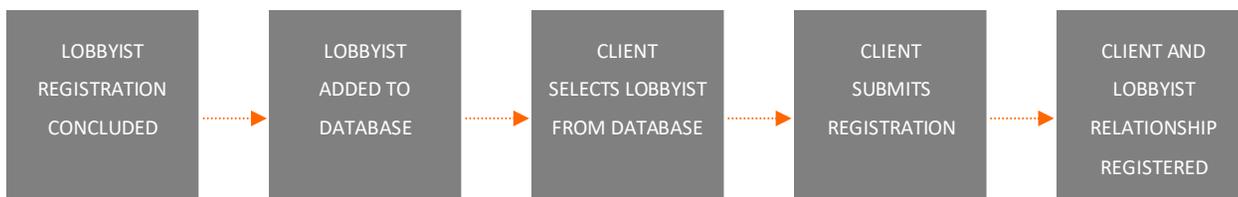
- Your **user name** is saved. It will be sent to the primary email address on your registration.
- Your **password** is not saved. A temporary password will be sent to your primary email. Use the change password link to personalize your temporary password.

Registration Sequence

A client registers after the lobbyist or entity

A client can only employ the services of a lobbyist or lobbyist entity that is registered through the online system.

- During registration, the client creates the lobbying relationship by using a search tool to locate its lobbyist from the system’s database.
- The lobbyist’s registration **must be concluded** before the client can locate the lobbyist. If the lobbyist is not in the database, the client cannot complete its registration.
- When both parties are registered, the lobbying relationship is created.



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

Client 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 access the registration form.

The screenshot shows the client homepage 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, there are links for Account Homepage, Online help, Contact the Lobbyist Division, Change password, and Log out. The main heading is "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 documents are submitted to the Lobbyist Division and concluded.

Welcome, Client Test

- Your 2013 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.

Registration	Disclosure Reports
2013 Registration Not registered <ul style="list-style-type: none">• Complete and submit	2013 Reports Links appear when registration is submitted, paid, and concluded.

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.

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

100%

Preparing and submitting a registration

The first page provides general instructions for completing your registration.

Important: You will not be able to register until your lobbyist's registration is submitted and concluded.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, there are navigation links: 'Account Homepage - Client Test', 'Online help', 'Contact the Lobbyist Division', 'Change password', and 'Log out'. The main heading is 'Lobbyist Registration & Reporting System'. Below this, a progress bar shows the steps: 'Start' (highlighted in orange), 'Enter Data', 'Add Lobbyist/Entity', 'Search Lobbyist/Entity', 'Review', 'Pay', and 'Submit'. The current step is 'Start'. The registration year is set to 2013.

Lobbyists and clients are required to register annually

- The annual registration period is open **Dec 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.

Preparing and submitting a registration

Complete the required client information, and then register any lobbyist or entity who will be providing lobbying services on your behalf. When you are finished, proceed to the review, certify, and payment steps.

- **Clients register after lobbyists** Your lobbyist's registration must be concluded before you can add them to your registration.
- A client can only retain the services of a lobbyist or entity that is registered in the Lobbyist Registration & Reporting System.
- **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 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.

Buttons: 'Registration Form', 'Back to account homepage'

Footer: '100%'

Complete the registration form

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

The screenshot displays the 'Client Registration' process for the year 2013. At the top, a progress bar shows seven steps: Start, Enter Data, Add Lobbyist/Entity, Search Lobbyist/Entity, Review, Pay, and Submit. The 'Start' and 'Enter Data' steps are highlighted with orange circles, indicating the current stage. Below the progress bar, the 'Client Registration Form' is shown with a note: '* Complete all required fields'. The form includes the following fields:

- Company name: Client Test Account
- Authorizing officer name (first, middle, last): Client
- Title: Test
- Authorizing Officer: Account
- Street address: Authorizing Officer
- 1 Beacon
- Suite, floor, apartment: [Empty]
- City, state, zip code: Boston MA 12345
- Country: United States
- Area code, phone number: 1234567890
- Primary email address: clienttestaccount@sec.state.ma.us
- Secondary email addresses: [Empty]
- Business interest: High Technology

Below the form, there are two columns of text:

- Left column: Account notices are sent to all email addresses listed. Passwords are sent only to the primary address. Once concluded, your registration information is visible to the public.
- Right column: *** Select save and continue to add your lobbyists to your registration.** A client is required to add the name of any lobbyist or entity employed to provide lobbying services. Lobbyists must be registered before you can locate a name from the system's database. Clients must add at least one lobbyist or entity.

At the bottom of the form, there are two buttons: 'Save and continue' and 'Back to account homepage'. The page is zoomed in at 100%.

Adding your lobbyists

- You are required to add to your registration the name of any lobbyist or lobbyist entity that you have retained to provide lobbying services on your behalf.
- Select “**search**” to access the online database of registered lobbyists and lobbyist entities.
- Only lobbyists that selected they would be hired by a client will appear in the drop down list.
- You return to this screen to view your list of lobbyists:

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, it shows 'Client Registration | Registration year: 2013'. A progress bar below the title consists of seven steps: Start, Enter Data, Add Lobbyist/Entity, Search Lobbyist/Entity, Review, Pay, and Submit. The 'Add Lobbyist/Entity' step is currently active, indicated by a solid orange circle, while the other steps are shown as empty circles. Below the progress bar, the heading 'Client lobbyist list:' is followed by a paragraph explaining that this is a list of individual lobbyists or entities providing services. A bulleted list provides instructions: each time a lobbyist is added, the user returns to this screen; the 'Date of employment' is typically January 1; after adding all lobbyists, the user should click 'Save and Continue'; and before final submission, the user can edit or remove entries. A message box states, 'There are no lobbyists or entities associated with your registration.' At the bottom, there are three buttons: 'Back to previous screen', 'Search', and 'Save and continue'. The browser's zoom level is set to 100%.

Searching for a lobbyist or entity from the database

Your lobbyist or lobbyist entity must be **registered**.

- If you employ more than one lobbyist, create a separate search for each one.
- Use the first box to search for an entity; use the second box to search for an individual lobbyist.
- Enter a name and select “**search**”.

The screenshot displays the 'Lobbyist Registration & Reporting System' interface. At the top, it features the name and title of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, along with the state seal. A navigation bar includes links for HOME, DIRECTIONS, and CONTACT US, and a search bar for the Secretary's website. Below the navigation, a progress bar indicates the current step: 'Client Registration | Registration year: 2021'. The progress bar consists of seven steps: Start, Enter Data, Add Lobbyist/Entity, Search Lobbyist/Entity, Review, Pay, and Submit. The 'Search Lobbyist/Entity' step is currently active. The main content area is divided into two columns. The left column provides instructions on how to search for a lobbyist or lobbyist entity, including a note about not searching for a sub-agent and a 'No results?' section. The right column is titled 'Search for your lobbyist or lobbyist entity:' and contains a search form with a 'Select:' dropdown menu set to 'Lobbyist Entity' and a 'Back to previous page' button. At the bottom of the page, there are links for 'Terms and Conditions' and 'Accessibility Statement'.

Account Homepage - clienttestaccount416205 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Client Registration | Registration year: 2021

Start Enter Data Add Lobbyist/Entity Search Lobbyist/Entity Review Pay Submit

Select lobbyist or lobbyist entity to start your search

Search for one lobbyist or lobbyist entity at a time:

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

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

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

Search for your lobbyist or lobbyist entity:

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

The system will display a "select" link with your search results. Click on select to move to the next screen where you will add the required employment details for this lobbyist or lobbyist entity.

Select: Lobbyist Lobbyist Entity

[Back to previous page](#)

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

Search results

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

- If the results are incorrect, search again.
- If the results are correct, click on the **“select”** link to move to the next screen where you will add required details for this lobbyist.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Lobbyist Registration & Reporting System

Client Registration | Registration year: 2021

Start Enter Data Add Lobbyist/Entity Search Lobbyist/Entity Review Pay Submit

Select lobbyist or lobbyist entity to start your search

Search for one lobbyist or lobbyist entity at a time:

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

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

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

Search for your lobbyist or lobbyist entity:

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

The system will display a "select" link with your search results. Click on select to move to the next screen where you will add the required employment details for this lobbyist or lobbyist entity.

Select: Lobbyist Lobbyist Entity

account

Enter last name of lobbyist (full or partial)

Search Clear text Back to previous page

Records found: 2

Account Type	Name of Lobbyist or Entity	Select
Lobbyist	Lobbyist Test Account	Select

Add employment details for this lobbyist

Enter the **date** you are employing, or plan to employ, this lobbyist.

- Enter as much information required regarding the purpose of retaining this lobbyist.
- Select **“save and continue”** to move on to the next step.

Account Homepage - clienttestaccount416205 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Client Registration | Registration year: 2021

Start Enter Data Add Lobbyist/Entity Search Lobbyist/Entity Review Pay Submit

Add the required information for your lobbyist or entity

Lobbyist name: Lobbyist Test Account

Employment date: *

Employment date is when your lobbyist or entity will act on your behalf, or provide lobbying services

Enter all details about your lobbyist or entity's efforts: *
Describe legislation (including bill numbers if known), names of specific legislators, and/or all areas of interest for which you have retained the services of this lobbyist or entity. Add as much detail as required; text box automatically expands.

Lobbying Efforts

Client Lobbyist List

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

- Select “**search**” to continue adding lobbyists.
- When all lobbyists are added, select “**save and continue**” to proceed to the next screen.
- Use the “edit” link next to a lobbyist’s name to make changes to lobbying details.
- Select “**remove**” to delete this lobbyist before you submit your registration.

Once concluded, a lobbyist can only be removed by filing an online notice of termination.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

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Lobbyist Registration & Reporting System

Client Registration | Registration year: 2021

Start Enter Data Add Lobbyist/Entity Search Lobbyist/Entity Review Pay Submit

Date of employment

The employment date is the date in the registration year the lobbyist or lobbyist entity agrees to provide lobbying services; this date is usually January 1. Late fees may be assessed if the employment date is more than (10) ten days prior to the date of submission.

Client lobbyist list:

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

- Each time you add a lobbyist, you return to this screen to view your list.
- After all lobbyists are added, select **Save and Continue** to proceed to the review, certification, and payment steps.
- Before you submit your registration, you can **edit** details or **remove** an entry from this list.

Type	Name	Employed	Terminated	Lobbyist or Entity's efforts	Edit	Delete
Lobbyist	Lobbyist Test Account	1/1/2021		Lobbying Efforts	edit	delete

[Back to previous screen](#) [Search](#) [Save and continue to payment](#)

Review and certify your registration

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

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

The screenshot shows the 'Review registration and certify' step of 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 features a progress bar with seven steps: Start, Enter Data, Add Lobbyist/Entity, Search Lobbyist/Entity, Review, Pay, and Submit. The 'Review' step is currently active. Below the progress bar, the 'Review registration and certify' section contains a form with the following fields:

- Company name:** Client Test Account
- Authorizing officer, title:** Client Test Account Authorizing Officer
- Address:** 1 Test Avenue Test, MA 12345 US
- Phone number:** 123-456-7890
- Primary email address:** test@abc.com
- Secondary email addresses:**
- Business interest:** AgricultureForestryFishing

Below the form is a table with the following data:

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

At the bottom of the form, there is a certification section with the following text:

Account notices are sent to all email addresses listed. Passwords are sent only to the primary address. Notice may also be sent by mail to the authorizing officer 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 Client Test Account, authorizing officer of Client Test Account, 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.

Below the certification text are three buttons: AGREE AND CONTINUE, Save for later, and Back.

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 shows the 'Payment is now due' page of the Lobbyist Registration & Reporting System. 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, CONTACT US, and a search box. The main content area includes a progress bar with seven steps: Start, Enter Data, Add Lobbyist/Entity, Search Lobbyist/Entity, Review, Pay, and Submit. The 'Pay' step is currently active. To the left, there are two boxes: 'Registration Filing Fees' and 'Disclosure Report late fees'. The 'Registration Filing Fees' box lists fees for Lobbyist (\$100), Lobbyist Entity (\$1,000), and Client (\$100 per lobbying relationship). The 'Disclosure Report late fees' box lists fees of \$50 per day for reports up to 20 days late and \$100 per day for reports more than 20 days late. The 'Payment is now due:' section displays a table with the following information:

Reason	Filing fee for registration of client and lobbyist(s):
Account	Client Test Account
Lobbyists	Lobbyist Test Account
Total amount due:	\$100.00

Below the table, there are two buttons: 'Pay Online' and 'Account homepage'. The 'Pay Online' button is highlighted. Below it, text reads: 'Use an e-check, MasterCard, Visa, or American Express. An expedited fee is added at time of payment.' To the right of the payment information, there is a 'For assistance' section with contact information for the Lobbyist Division and a reference to Massachusetts General Laws, Chapter 3, Sections 39 - 50.

Confirmation of registration payment

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

The screenshot shows the 'Confirmation of payment' page in 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 box. The main content area features the title 'Lobbyist Registration & Reporting System' and 'Client Registration 2021'. The central section is titled 'Confirmation of payment' and contains a message confirming that the filing has been paid and submitted for review. It includes a list of instructions: 'The Lobbyist Division will notify you if additional information is required' and 'Check your email and account homepage for your current status'. A confirmation number '200277' is displayed in a text box. A 'Back to account homepage' button is located below the confirmation number. To the left, there is a box with information about lobbyist registration and disclosure reporting, and contact information for the Lobbyist Division. To the right, there is a box titled 'Keep your registration current' with critical information about updates and termination. At the bottom, there is a footer with the Secretary's name and links for 'Terms and Conditions' and 'Accessibility Statement'.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Account Homepage - clienttestaccount416205 Online help Contact the Lobbyist Division Change password Log out

Lobbyist Registration & Reporting System

Client Registration 2021

Confirmation of payment

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

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

This is your confirmation number:

[Back to account homepage](#)

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

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

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

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

William Francis Galvin, Secretary of the Commonwealth of Massachusetts

[Terms and Conditions](#)
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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.

The screenshot shows the account homepage for William Francis Galvin, Secretary of the Commonwealth of Massachusetts. The page features a header with the Secretary's name and title, a navigation menu with links for HOME, DIRECTIONS, and CONTACT US, and a search bar. The main content area is titled "Lobbyist Registration & Reporting System" and includes a welcome message for user "clienttestaccount416205". The welcome message lists key information: 2021 registration is concluded, the next disclosure report is due July 15, 2021, and links to reports for January-June 2021 and July-December 2021. A table below the welcome message provides details for registration and disclosure reports. The registration section shows "2021 Registration Concluded 11-25-2020" with links for "Amend registration", "View or print", "Apply for waiver", "Terminate a lobbying relationship", and "Payment history". The disclosure reports section shows "January - June 2021" (link available) and "July - December 2021" (link not available). A "History:" dropdown menu is set to "Select". At the bottom, there is a "Select a year to access prior registration and disclosure reports:" section with "2021" selected.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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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, clienttestaccount416205

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

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

Select a year to access prior registration and disclosure reports:
2021

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

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