

User Guide

Lobbyist Registration & Reporting System

DISCLOSURE REPORTING

Reviewing your registration is the first step in filing a disclosure report

- Information from your registration records is used to create your disclosure forms
- Select the “registration review” link from the navigation bar

Lobbyist Registration & Reporting System

Disclosure Report — Entity Test Account Disclosure reporting period: July 1 — December 31, 2013

ONLINE HELP **Start** Registration Review 1 Operating Expenses and Salaries 2 Activities and Bill Numbers 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.

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

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

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

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.

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

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

Lobbyist registration review screens

Review all information and update if necessary

- To correct information, select “update registration” and then follow the links to edit or amend

Lobbyist Registration & Reporting System

Disclosure Report — Lobbyist Test Account Disclosure reporting period: January 1 — June 30, 2013

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

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

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

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

Review your 2013 registration

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

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

Lobbyist name: Lobbyist Test Account
Business name: Lobbyist Test Account
Address: 1 Beacon Boston, MA 12345 US
Phone number: 123-456-7890
Primary email address: lobbyisttestaccount@sec.state.ma.us
Secondary email addresses:
Agent type: Both

| Client name | Employed | Terminated |
|-----------------|----------|------------|
| ClientTestSep11 | 1/1/2013 | |

[Update Registration](#) Note: Registration amendments must be submitted and concluded by the Lobbyist Division before you can certify and submit your disclosure

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and clients are required to submit disclosure reports within the 2-week period that follows **each reporting period**

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

Update your registration records

Edit or update any information that is not correct for this registration year. If you are not making any corrections, proceed to the disclosure forms.

Select a link

[Edit registration](#)

- Edits to contact information are made automatically (address, email, phone number)

[Amend registration](#)

- An amendment (last name, company name) must be submitted to the Lobbyist Division for review and conclusion

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

Entity registration review screens

Sub-agent and general expense forms are created from these records

- To correct information, select “update registration” and then follow the links to edit or amend

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 2013 registration records

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

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

| | | |
|----------------------------------|--------------------------------|---------------------|
| Business name: | Entity Test Account | |
| Authorizing officer name, title: | Entity Test Account | Authorizing Officer |
| Address: | 1 Beacon Boston, MA 12345 US | |
| Phone number: | 123-123-1231232 | |
| Primary email address: | sandra.berardi@sec.state.ma.us | |
| Secondary email addresses: | sandra.berardi@sec.state.ma.us | |

| Client name | Employed | Terminated |
|---------------------|----------|------------|
| Client Test Account | 1/1/2013 | |

| Sub-agent name | Employment date | Termination date |
|----------------------|-----------------|------------------|
| Christopher Lawrence | 01/01/2013 | |

[Update Registration](#) Note: Registration amendments must be submitted and concluded by the Lobbyist Division before you can certify

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within the 2-week period that follows each reporting period

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

Edit or update any information that is not correct for this registration year. If you are not making any corrections, proceed to the disclosure forms.

Select a link

- [Edit entity registration](#)
 - Edits to contact information are made automatically (address, email, phone number)
- [Edit or amend a sub-agent registration](#)
 - Entities are responsible for the registration of each sub-agent employed
- [Amend entity registration](#)
 - Add a sub-agent (requires \$100 filing fee for each sub-agent)
 - Change the name of your company or authorizing officer
- [Terminate relationship](#)
 - Terminate a relationship with a sub-agent (no filing fee)

Have technical questions about the online disclosure reporting process, contact the Lobbyist Division at 617-727-9122

Client registration review screens

- To correct information, select “update registration” and then follow the links to **edit or amend**

Disclosure Report — Client Test Account Disclosure reporting period: January 1 — June 30, 2013

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

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 2013 registration records

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

Contact the Lobbyist Division if you have technical questions about the online reporting process

Company name: Client Test Account

Authorizing officer: Client Test Account Authorizing Officer

Address: 1 Beacon Boston, MA 12345 US

Phone number: 123-456-7890

Primary email address: clienttestaccount@sec.state.ma.us

Secondary email addresses:

Business interest: HighTech

| Lobbyist or entity | Name | Employed | Terminated |
|--------------------|---------------------|------------|------------|
| Entity | SAMCRO Entity | 01/01/2013 | |
| Entity | Entity Test Account | 01/01/2013 | |

Update this registration

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Registration amendments must be submitted and concluded by the Lobbyist Division before you can certify and submit your disclosure report.

clients are required to submit reports within the 2-week period that follows each reporting period

Update your registration records

Edit or update any information that is not correct for this registration year. If you are not making any corrections, proceed to the disclosure forms.

Select a link

- [Edit registration](#)
 - Edits to contact information are made automatically (address, email, phone number)
- [Amend employment date or affected legislation](#)
 - Change the employment date of a lobbyist relationship
 - Update details of a bill number or legislative activity
- [Amend registration](#)
 - Add a lobbyist or entity (requires \$100 filing fee for each relationship)
 - Change the name of your company or authorizing officer
- [Terminate relationship](#)
 - Terminate a relationship with a lobbyist or entity (no filing fee)

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