



Lobbyist Registration & Reporting (LRR) E-Filing System Instructions

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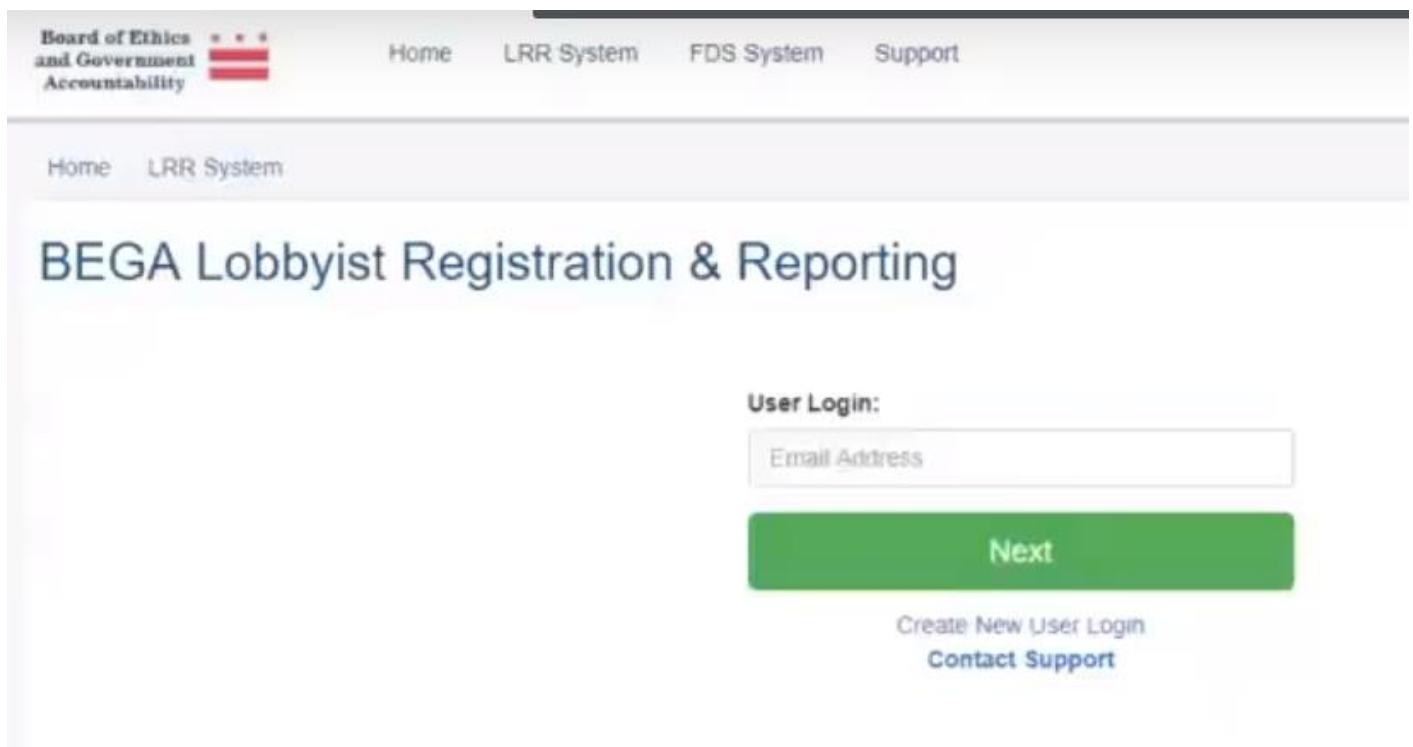
1. Introduction to LRR

In January 2019, the Board of Ethics and Government Accountability (BEGA), in partnership with the Office of the Chief Technology Officer (OCTO), launched its new Lobbyist Registration & Reporting (LRR) e-filing system. Lobbying Registrants will use this new system to file Registration Reports and Activity Reports starting with the January 2019 reporting period.

The login page for the new system is located at <https://efiler.bega.dc.gov/LobbyistAccount/Login>

1.1 How to Create a New LRR System User

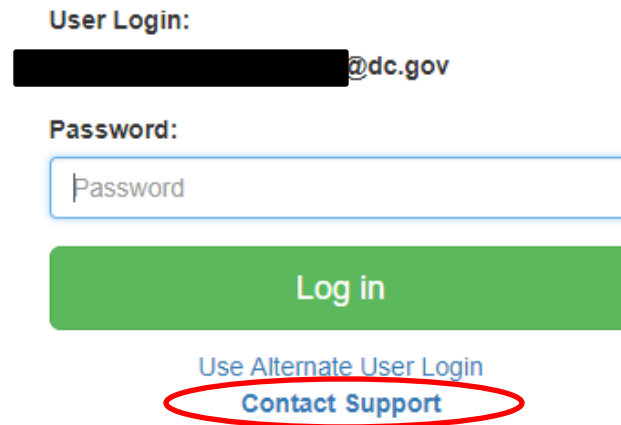
When visiting the LRR User Login page for the first time, you should type your email address in the **User Login** text box, then hit the green **Next** button to see if you already have an account in the new system.



The screenshot shows the BEGA Lobbyist Registration & Reporting User Login page. At the top, there is a navigation bar with the BEGA logo and links for Home, LRR System, FDS System, and Support. Below this is a sub-navigation bar with links for Home and LRR System. The main heading is "BEGA Lobbyist Registration & Reporting". The "User Login:" section contains a text box labeled "Email Address" and a green "Next" button. Below the button are links for "Create New User Login" and "Contact Support".

Figure 1. LRR User Login Page

If a User Account already exists for your email address in the LRR e-filing system, you will be prompted to enter your password, then hit the green “Log In” button to enter the system:



The screenshot shows a login form with the following elements:

- User Login:** A text input field containing a redacted email address followed by "@dc.gov".
- Password:** A text input field with the placeholder text "Password".
- Log in:** A large green button with the text "Log in".
- Use Alternate User Login** and **Contact Support:** Two links located below the Log in button. The "Contact Support" link is circled in red.

Figure 2. LRR Login Page – Account Already Exists

To log into LRR if a User Account already exists for your email address:

1. Navigate to: <https://efiler.bega.dc.gov/LobbyistAccount/Login>

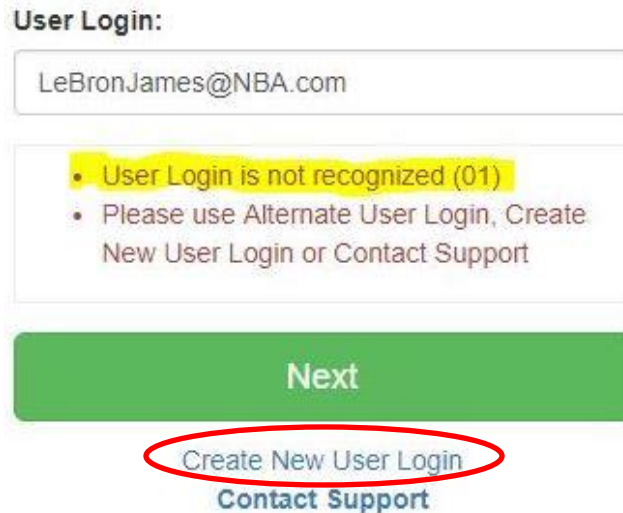
Note: This link is subject to change.

2. Enter your email address in the **User Login** box. See Figure 2.
3. Enter your password in the **Password** box.

Note: If you have forgotten your password, click on the **Contact Support** link at the bottom of Figure 2.

4. Click the green **Log In** button.
5. The **My Registrants** page displays. See Figure 13.

If a User Account does not already exist for your email address in the LRR e-filing system, you will receive the message below. You will then need to click the “Create New User Login” link:



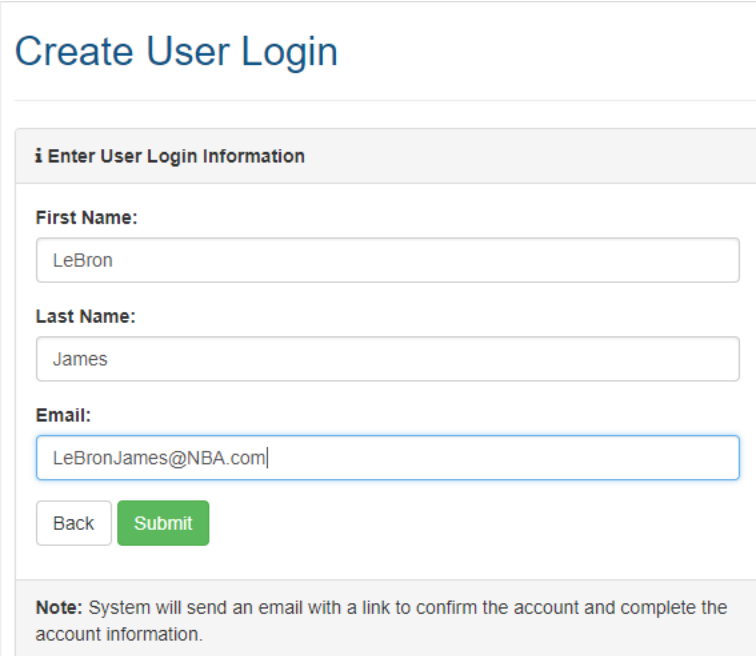
The screenshot shows a web form titled "User Login:". Below the title is a text input field containing the email address "LeBronJames@NBA.com". Below the input field is a message box with two bullet points: "• User Login is not recognized (01)" and "• Please use Alternate User Login, Create New User Login or Contact Support". Below the message box is a large green button labeled "Next". Below the "Next" button are two links: "Create New User Login" and "Contact Support". The "Create New User Login" link is circled in red.

Figure 3. LRR Login Page – Must Create New Account

To log into LRR if a User Account does not already exist for your email address:

1. Navigate to: <https://efiler.bega.dc.gov/LRR>
Note: This link is subject to change.
2. Click on the **Create New User Login** link. See Figure 3.
3. The **Create User Login** page displays. See Figure 4.
4. Enter your first name in the **First Name** box.
5. Enter your last name in the **Last Name** box.
6. Enter your email address in the **Email** box.
7. Click the green **Submit** button.
8. The **Create User Login** page will change to indicate that BEGA has sent an email to your email address with a link to confirm your User Login and create a password. See Figure 5.
9. Open your email inbox and you should see a message from bega@dc.gov with the subject **[BEGA DC] Confirm your account**. See Figure 6.
Note: If you do not see a new message from bega@dc.gov in your email inbox within just a few minutes, please check your “Junk” or “Spam” folder because your email service may have accidentally diverted the message there.

10. Open the message from BEGA and click on the link to confirm your email address and create a new User Login. See Figure 7.
11. When you click on the link from BEGA, your web browser will open a new tab or new window at the **Create User Login** page. See Figure 8.
12. Enter your preferred password in the **Password** box.
Note: Passwords must be at least 8 characters and contain at 3 of 4 of the following: upper case (A-Z), lower case (a-z), number (0-9) and special character (examples: !@#\$%^&*)
13. Re-enter your preferred password in the **Confirm Password** box.
14. Click on the green **Submit** button.
15. The Create User Login page will change again, indicating that you have successfully confirmed your User Login. See Figure 9. Click on the green **Login** button.
16. You will be re-directed to the **LRR Login** page. See Figure 1.
17. Enter your email address in the **User Login** box. See Figure 2.
18. Enter your password in the **Password** box.
Note: If you have forgotten your password, click on the **Contact Support link at the bottom of Figure 2.**
19. Click the green **Log In** button.
20. The **My Registrants** page displays. See Figure 13.



Create User Login

i Enter User Login Information

First Name:

Last Name:

Email:

Note: System will send an email with a link to confirm the account and complete the account information.

Figure 4. Create User Login Page

Create User Login

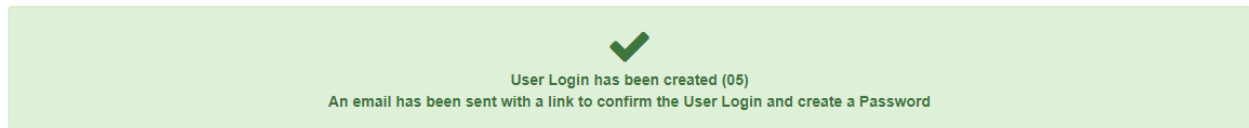


Figure 5. Create User Login Page – Confirmation Email Sent

<input type="checkbox"/>	From	Subject
<input type="checkbox"/>	bega@dc.gov	[BEGA DC] Confirm your account : Please confirm and comp
<input type="checkbox"/>	CENTRAL BANK Of Nigeria	YOUR FUND APPROVED PAYMENT OF \$25,000,000.00 (T
<input type="checkbox"/>	Michael Tozzolo	Do you need a home warranty? : Decide whether you need th

Figure 6. User Login Confirmation Email – Subject Line

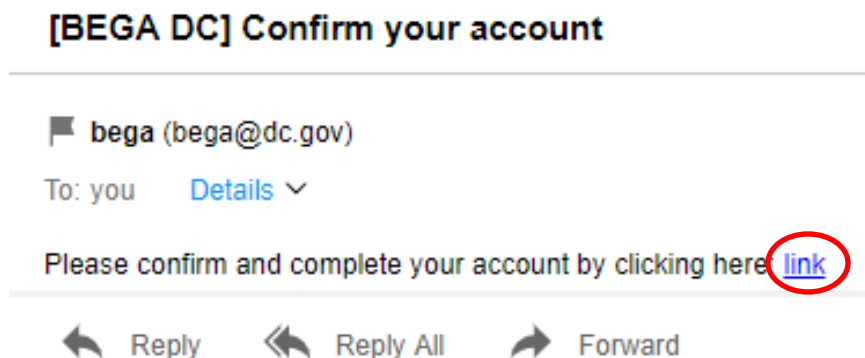


Figure 7. User Login Confirmation Email – Link

Create User Login

i Password Information


Password:

Confirm Password:

Passwords must be at least 8 characters and contain at 3 of 4 of the following:
 upper case (A-Z), lower case (a-z), number (0-9) and special character (e.g.
 !@#\$%^&*)

Figure 8. Create User Login Page - Add Password

Create User Login



User Login has been confirmed (06)
 Please log into the application

Figure 9. Create User Login Page – User Confirmed

1.2 How to Create a Technical Support Ticket

At the top of every page in the LRR e-filing system, there is a **Support** link. See Figure 10 below. There is also a Support link on the **LRR Login** page. See Figure 2. If you click on the **Support** link, the Customer Support page opens and allows you to enter information regarding whatever technical issue you are experiencing with the system. By clicking on the green Submit button, your information is submitted directly into BEGA's support ticket program. One of our Technical Support Specialists or another IT staff member will review your Support Ticket and contact you to help resolve your problem.



Figure 10. Technical Support Request Link

To create a Technical Support Ticket:

1. Click the **Support** link. See Figure 10.
2. The **Customer Support** page displays. See Figure 11.
3. Enter your first name and last name in the **Name** box.
4. Enter the name of your agency or organization in the **Agency/Organization** box.
5. Enter your email address in the **Email Address** box.
6. Enter your preferred contact telephone number in the **Phone Number** box.
7. Use the **Issue Type** pulldown menu to select the type of issue you are experiencing.
8. Enter any additional relevant details in the **More Details** box.
9. Click the green **Log In** button.
10. The Customer Support page changes to indicate that your Technical Support ticket was successfully submitted. See Figure 12.

Contact Support

Enter Support Ticket Information (* required field)

Name*:

Agency/Organization*:

Email Address*:

Phone Number*:

Issue Type*:

More Details:

Figure 11. Contact Support Page

Contact Support



Figure 12. Technical Support Ticket Created

2. Creating New Registrants

After successfully logging into the LRR e-filing system, the **My Registrants** page opens. The **My Registrants** page is essentially the main “jumping off point” for the LRR system. Your **User Login** name will appear in the locations where “Mary Tester” is shown in Figure 13.

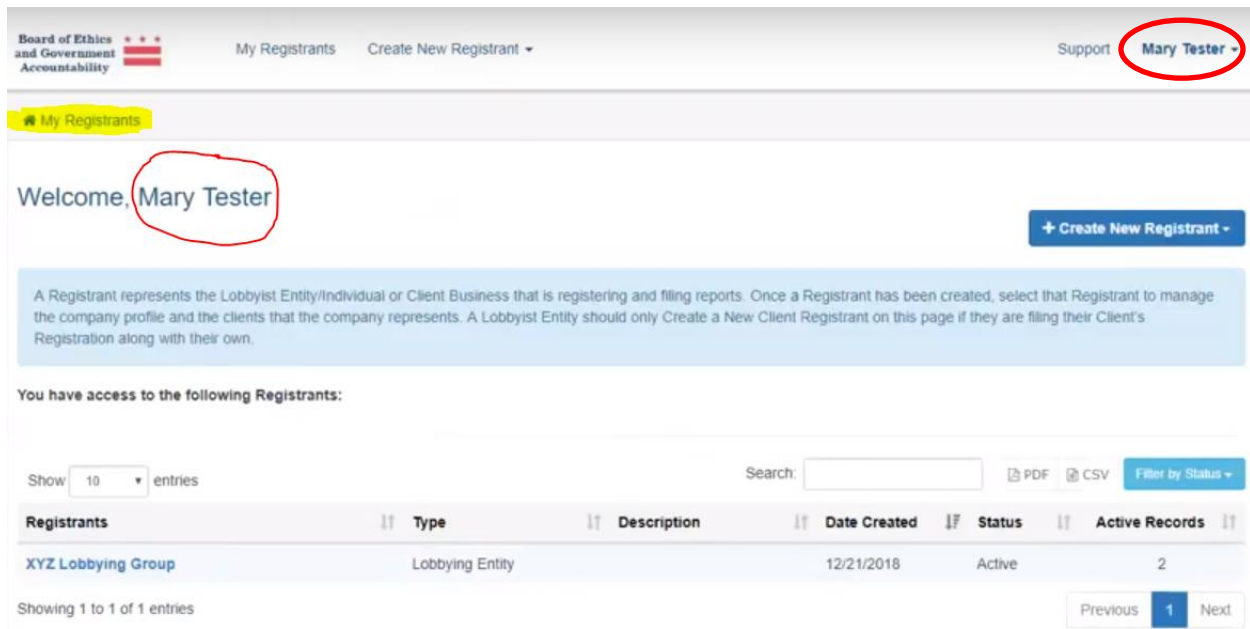


Figure 13. My Registrants Page

From the **My Registrants** page, each User can create new Registrants in two distinct categories: **Lobbyists** and **Clients**. When you click on the blue **Create New Registrant** button, a dropdown menu appears allowing you to either Add a New Lobbyist, or Add a New Client:

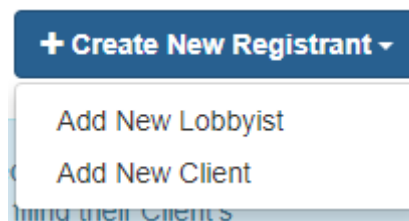


Figure 14. Create New Registrant Button

Note: Users who work as *Lobbyists* should only create a New Client Registrant on this page if they will be filing that Client’s Registration Reports and Activity Reports. Otherwise, they just need to create a profile for each of their Clients through their own **Registrant Profile** page by following the instructions set forth in Section 3.1 below.

Likewise, Users who work as *Clients* should only create a New Lobbyist Registrant if they will be filing that Lobbyist's Registration Reports and Activity Reports. Otherwise, they just need to create a profile for each of their Lobbyists through their own **Registrant Profile** page by following the instructions set forth in Section 3.2 below.

To reiterate, if a Lobbyist plans to file Registration Reports and Activity Reports for one of its outside Clients, it must complete the following three processes:

1. It must create a **New Lobbyist Registrant** for itself on the **My Registrants** page, following either the process described in Section 2.1 below (for Lobbying Entities) or Section 2.3 (for Individual Lobbyists);
2. To be able to file Reports for the Client, it must create a **New Client Registrant** for each Client whose Reports it plans to file on the **My Registrants** page, following the process described in Section 2.4 below; and
3. To be able to file the Lobbyist's own Reports, it must create a **New Client Profile** for each of its Clients within the framework of the Lobbyist's own Registrant Profile page, following the process described in Section 3.1 below.

Likewise, in the rare instances where a Client plans to file Registration Reports and Activity Reports for one of its outside Lobbyists, it must complete the following three processes:

1. It must create a **New Client Registrant** for itself on the **My Registrants** page, following the process described in Section 2.4 below;
2. To be able to file reports for the Lobbyist, it must create a **New Lobbyist Registrant** for each outside Lobbyist on the **My Registrants** page, following either the process described in Section 2.1 below (for Lobbying Entities) or Section 2.3 (for Individual Lobbyists).
3. To be able to file the Client's own Reports, it must create a **New Lobbyist Profile** for each of its outside Lobbyists within the framework of the Client's own Registrant Profile page, following the process described in Section 3.2 below.

2.1 How to Create a New Registrant (Lobbying Entity that represents outside clients)

If a person or entity performs Lobbying services – either on behalf of third-party clients or on his/her/its own behalf by using in-house personnel – that person or entity will need to create a **New Lobbyist Registrant** in the LRR e-filing system. Likewise, if a User who typically works as a *Client* intends to file Registration Reports and Activity Reports with BEGA on behalf of its Lobbyists, that User would also need to create a **New Lobbyist Registrant** for each such Lobbyist. Lobbyist Registrants are further broken down into two categories:

1. **Individual Lobbyists** (e.g. someone who is self-employed running a one-person lobbying operation); and

2. **Lobbying Entities** (e.g. an entity like an LLC where more than one person performs lobbying activities.)

When you select the **Add New Lobbyist** option, the Create Registrant: Lobbyist page will open. On this page, you must choose A) whether this Registrant is an Individual Lobbyist or a Lobbying Entity, B) whether this Registrant represents itself as a client, (C) identify the nature of the Registrant's business, and D) indicate whether this Registrant is a 501(c)(3) Non-Profit organization entitled to the reduced \$50 registration fee or not. If none of the options in the pulldown menu seem to describe the nature of the Registrant's business, you can click on the red "Add New" button to type a new description.

To create a new Lobbying Entity Registrant that represents outside clients:

1. On the **My Registrants** page, click the blue **Create New Registrant** button. See Figure 13.
2. Select the **Add New Lobbyist** option from the resulting dropdown menu. See Figure 14.
3. The **Create Registrant: Lobbyist** page opens. See Figure 15.
4. Enter the registrant's name in the **Registrant Name** box.
5. Under **Registrant Type**, click on the **Lobbying Entity** radio button.
6. Click on the **No** radio button under **Are you representing yourself as a client?**
7. Enter a description of the registrant in the **Description** box.

Note: The **Description** field is *optional*.

8. Use the **Nature of Business** pulldown menu to select an option that accurately describes the nature of the registrant's business. See Figure 16.

Note: If none of the options provided accurately describes the nature of the registrant's business, click on the red **+Add New** button and the **Add New Nature of Business** dialog box will appear. See Figure 17. Enter an accurate description of the registrant's business in the **Nature of Business** box.

9. Unless the registrant has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, under **IRS Tax Status**, click on the **Registrant is not 501(c)(3)** radio button.

Note: If the registrant is a 501(c)(3) organization, click on the **501(c)(3) Non-Profit Registrant** radio button and enter the organization's IRS number in the **IRS Number** box. See Figure 18.

10. You must add contact information for the registrant, including at least A) **one phone number** **and** B) **one email address**. See Figure 19.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.

- c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this registrant. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this registrant. See Figures 19 and 20.
 - d) Click the blue **Save Contact Info** button. See Figure 19.
- 11.** Repeat Steps 10a, 10b, 10c and 10d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this registrant.
- 12.** After you have added all applicable methods of contact for this registrant – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 19.
- Note:** Clicking the blue **Save Contact Info** button will not permanently save that information to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.
- 13.** You must add at least one work address for the registrant. See Figure 21.
- a) Enter the registrant's street address or post office box in the **Address Line 1** box.
 - b) Enter the registrant's suite, apartment or unit number in the **Address Line 2** box.
 - c) Enter the registrant's city name in the **City** box.
 - d) Enter the registrant's state in the **State** box.
 - e) Enter the registrant's Zip Code in the **Zip Code** box.
 - f) Use the **Country** pulldown menu to select the registrant's country of residence.
 - g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
 - h) Click the blue **Save Address** button.
- Note:** Clicking the blue **Save Address** button will not permanently save that address to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.
- 14.** Repeat Steps 13a through 13h to add additional addresses for this registrant.
- 15.** Click the green **Save Registrant Profile** button at the bottom of the page.

My Registrants / Create Registrant: Lobbyist

Create Registrant: Lobbyist

i Information

Registrant Name:

Registrant Type:

☐ Individual Lobbyist
☒ Lobbying Entity

Are you representing your self as a client?

☐ Yes
☒ No

Description (optional):

Nature of Business:

 + Add New

IRS Tax Status:

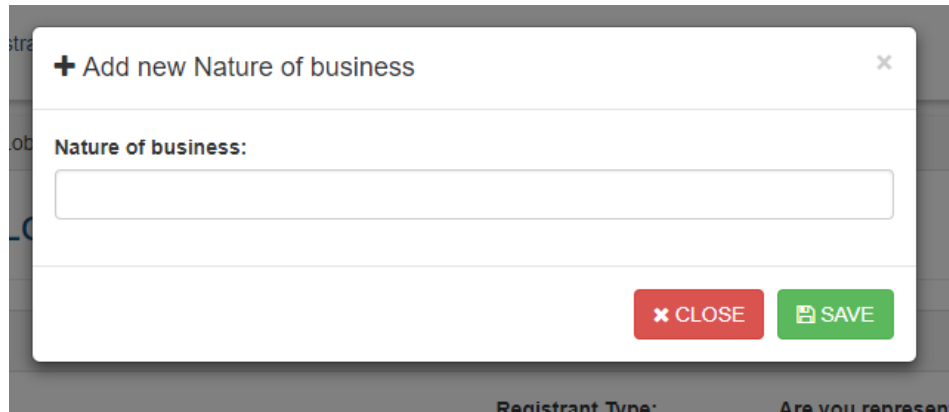
☒ Registrant is not 501(c)(3)
☐ 501(c)(3) Non-Profit Registrant

Figure 15. Create Registrant: Lobbyist Page – Lobbying Entity

Nature of Business:

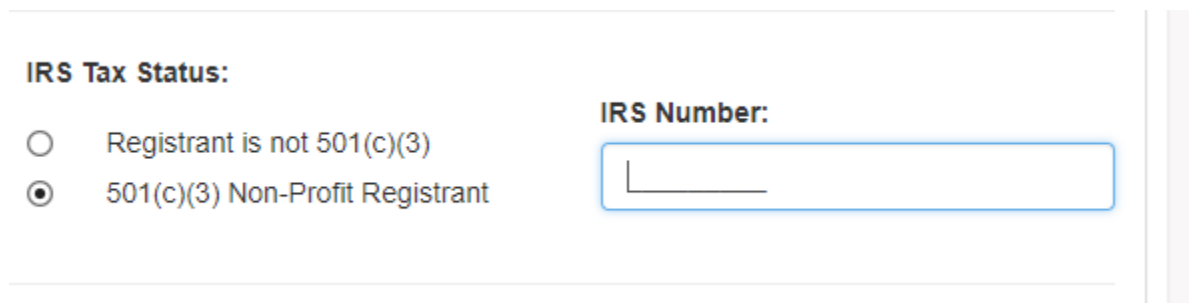
+ Add New

Figure 16. Nature of Business Pulldown Menu



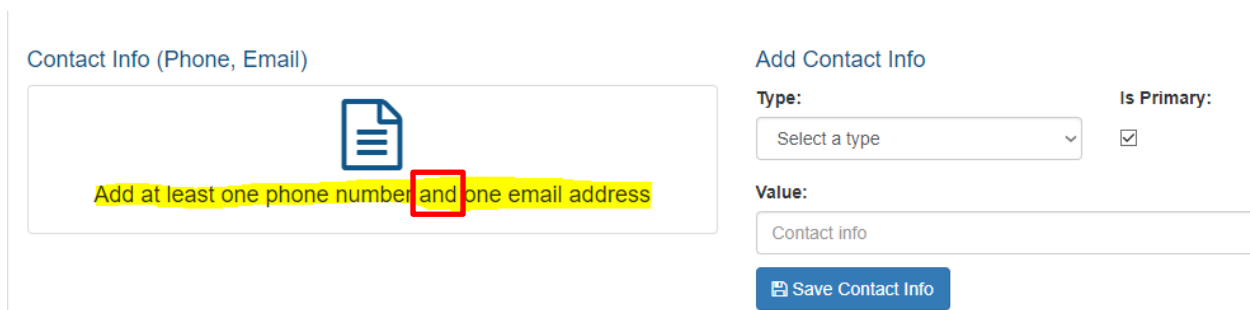
A dialog box titled "+ Add new Nature of business" with a close button (X) in the top right corner. Below the title is a label "Nature of business:" followed by a text input field. At the bottom right of the dialog are two buttons: a red "CLOSE" button and a green "SAVE" button.

Figure 17. Add New Nature of Business Dialog Box



A form section for IRS information. On the left, under the heading "IRS Tax Status:", there are two radio button options: "Registrant is not 501(c)(3)" and "501(c)(3) Non-Profit Registrant", with the second option selected. To the right, under the heading "IRS Number:", there is a text input field.

Figure 18. IRS Number Box



A form section for adding contact information. On the left, under the heading "Contact Info (Phone, Email)", there is a large text area containing a document icon and the text "Add at least one phone number and one email address". On the right, under the heading "Add Contact Info", there are two fields: "Type:" with a dropdown menu showing "Select a type", and "Is Primary:" with a checked checkbox. Below these is a "Value:" field containing the text "Contact info". At the bottom right is a blue "Save Contact Info" button.

Figure 19. Add Contact Info Section

Add Contact Info

Type:

Select a type

- Select a type
- Work phone
- Mobile phone
- Home phone
- Email address
- Other contact type

Is Primary:

☒

Figure 20. Contact Type Pulldown Menu

Addresses

4577 Napoleon Way NE
Washington, DC 20019
United States of America

Type: Permanent Address

Add Address

Address Line 1:
Address Line 1

Address Line 2:
Address Line 2

City:
City Name

State:
DC

Zip Code:
ZipCode

Country:
United States of America (USA)

Address Type:
Permanent Address

Save Address

Back
Save Registrant Profile

Figure 21. Address Section

2.2 How to Create a New Registrant (Lobbying Entity that represents itself)

If a person or entity performs Lobbying services on his/her/its own behalf by using in-house personnel, that person or entity must create a **New Lobbyist Registrant** in the LRR e-filing system. Lobbyist Registrants are further broken down into two categories:

- Individual Lobbyists** (e.g. someone who is self-employed running a one-person lobbying operation); and
- Lobbying Entities** (e.g. an entity like an LLC where more than one person performs lobbying activities.)

When you select the **Add New Lobbyist** option, the Create Registrant: Lobbyist page will open. On this page, you must choose A) whether this Registrant is an Individual Lobbyist or a Lobbying Entity, B) whether this Registrant represents itself as a client, (C) identify the nature of the Registrant's business, and D) indicate whether this Registrant is a 501(c)(3) Non-Profit organization entitled to the reduced \$50 registration fee or not. If none of the options in the pulldown menu seem to describe the nature of the Registrant's business, you can click on the red "Add New" button to type a new description.

NOTE: *If your organization uses in-house staff members to perform lobbying activities on its behalf – and thus is its own client – you only need to create one New **Registrant**, not two. In that situation, you should create a New **Lobbyist Registrant**, not a Client Registrant. And that **Lobbying Registrant** should be classified as a "**Lobbying Entity**" type of Lobbyist. You will also need to indicate that the Lobbying Entity is representing itself as a client by clicking the **Yes** radio button under **Are you representing yourself as a client?***

To create a new Lobbying Entity Registrant that represents itself:

1. On the **My Registrants** page, click the blue **Create New Registrant** button. See Figure 13.
2. Select the **Add New Lobbyist** option from the resulting dropdown menu. See Figure 14.
3. The **Create Registrant: Lobbyist** page opens. See Figure 15.
4. Enter the registrant's name in the **Registrant Name** box.
5. Under **Registrant Type**, click on the **Lobbying Entity** radio button.
6. Click on the **Yes** radio button under **Are you representing yourself as a client?**
7. Enter a description of the registrant in the **Description** box.

Note: The **Description** field is *optional*.

8. Use the **Nature of Business** pulldown menu to select an option that accurately describes the nature of the registrant's business. See Figure 16.

Note: If none of the options provided accurately describes the nature of the registrant's business, click on the red **+Add New** button and the **Add New Nature of Business** dialog box will appear. See Figure 17. Enter an accurate description of the registrant's business in the **Nature of Business** box.

9. Unless the registrant has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, under **IRS Tax Status**, click on the **Registrant is not 501(c)(3)** radio button.

Note: If the registrant is a 501(c)(3) organization, click on the **501(c)(3) Non-Profit Registrant** radio button and enter the organization's IRS number in the **IRS Number** box. See Figure 18.

10. You must add contact information for the registrant, including at least A) **one phone number** **and** B) **one email address**. See Figure 19.

- a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.
 - c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this registrant. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this registrant. See Figures 19 and 20.
 - d) Click the blue **Save Contact Info** button. See Figure 19.
- 11.** Repeat Steps 10a, 10b, 10c and 10d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this registrant.
- 12.** After you have added all applicable methods of contact for this registrant – including at least A) one phone number **and** B) one email address – click the blue **Save Contact Info** button. See Figure 19.
- Note:** *Clicking the blue **Save Contact Info** button will not permanently save that information to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.*
- 13.** You must add at least one work address for the registrant. See Figure 21.
- a) Enter the registrant's street address or post office box in the **Address Line 1** box.
 - b) Enter the registrant's suite, apartment or unit number in the **Address Line 2** box.
 - c) Enter the registrant's city name in the **City** box.
 - d) Enter the registrant's state in the **State** box.
 - e) Enter the registrant's Zip Code in the **Zip Code** box.
 - f) Use the **Country** pulldown menu to select the registrant's country of residence.
 - g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
 - h) Click the blue **Save Address** button.
- Note:** *Clicking the blue **Save Address** button will not permanently save that address to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.*
- 14.** Repeat Steps 13a through 13h to add additional addresses for this registrant.
- 15.** Click the green **Save Registrant Profile** button at the bottom of the page.

2.3 How to Create a New Registrant (Individual Lobbyist)

If a person or entity performs Lobbying services on his/her/its own behalf by using in-house personnel, that person or entity must create a **New Lobbyist Registrant** in the LRR e-filing system. Lobbyist Registrants are further broken down into two categories:

1. **Individual Lobbyists** (e.g. someone who is self-employed running a one-person lobbying operation); and
2. **Lobbying Entities** (e.g. an entity like an LLC where more than one person performs lobbying activities.)

When you select the **Add New Lobbyist** option, the Create Registrant: Lobbyist page will open. On this page, you must choose A) whether this Registrant is an Individual Lobbyist or a Lobbying Entity, B) whether this Registrant represents itself as a client, (C) identify the nature of the Registrant's business, and D) indicate whether this Registrant is a 501(c)(3) Non-Profit organization entitled to the reduced \$50 registration fee or not. If none of the options in the pulldown menu seem to describe the nature of the Registrant's business, you can click on the red "Add New" button to type a new description.

To create a new Individual Lobbyist Registrant:

1. On the **My Registrants** page, click the blue **Create New Registrant** button. See Figure 13.
2. Select the **Add New Lobbyist** option from the resulting dropdown menu. See Figure 14.
3. The **Create Registrant: Lobbyist** page opens. See Figure 15.
4. Enter the registrant's name in the **Registrant Name** box.
5. Under **Registrant Type**, click on the **Individual Lobbyist** radio button.
6. Click on the **No** radio button under **Are you representing yourself as a client?**
***Note:** If you are an Individual Lobbyist who believes that you are representing yourself as a client, please contact BEGA to discuss your situation at greater length.*
7. Enter a description of the registrant in the **Description** box.
***Note:** The **Description** field is optional.*
8. Use the **Nature of Business** pulldown menu to select an option that accurately describes the nature of the registrant's business. See Figure 16.
***Note:** If none of the options provided accurately describes the nature of the registrant's business, click on the red +**Add New** button and the **Add New Nature of Business** dialog box will appear. See Figure 17. Enter an accurate description of the registrant's business in the **Nature of Business** box.*
9. Because Individual Lobbyists by definition are individual human beings who cannot be certified by the Internal Revenue Service (IRS) as a 501(c)(3) organization, click on the **Registrant is not 501(c)(3)** radio button under **IRS Tax Status**.

10. You must add contact information for the registrant, including at least A) **one phone number** **and** B) **one email address**. See Figure 19.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.
 - c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this registrant. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this registrant. See Figures 19 and 20.
 - d) Click the blue **Save Contact Info** button. See Figure 19.

11. Repeat Steps 10a, 10b, 10c and 10d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this registrant.

12. After you have added all applicable methods of contact for this registrant – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 19.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.

13. You must add at least one work address for the registrant. See Figure 21.

- a) Enter the registrant's street address or post office box in the **Address Line 1** box.
- b) Enter the registrant's suite, apartment or unit number in the **Address Line 2** box.
- c) Enter the registrant's city name in the **City** box.
- d) Enter the registrant's state in the **State** box.
- e) Enter the registrant's Zip Code in the **Zip Code** box.
- f) Use the **Country** pulldown menu to select the registrant's country of residence.
- g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
- h) Click the blue **Save Address** button.

Note: Clicking the blue **Save Address** button will not permanently save that address to the registrant's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.

14. Repeat Steps 13a through 13h to add additional addresses for this registrant.

15. Click the green **Save Registrant Profile** button at the bottom of the page.

2.4 How to Create a New Registrant (Lobbying Client)

If a person or entity performs pays an outside firm to perform Lobbying services on his/her/its behalf, a **New Client Registrant** must be created for that person or entity in the LRR e-filing system.

When you select the **Add New Client** option, the Create Registrant: Client page will open. On this page, you must choose A) whether this Registrant is an Individual Lobbyist or a Lobbying Entity, B) whether this Registrant represents itself as a client, (C) identify the nature of the Registrant's business, and D) indicate whether this Registrant is a 501(c)(3) Non-Profit organization entitled to the reduced \$50 registration fee or not. If none of the options in the pulldown menu seem to describe the nature of the Registrant's business, you can click on the red "Add New" button to type a new description.

To create a new Lobbying Client Registrant:

1. On the **My Registrants** page, click the blue **Create New Registrant** button. See Figure 13.
2. Select the **Add New Client** option from the resulting dropdown menu. See Figure 14.
3. The **Create Registrant: Client** page opens. See Figure 22.
4. Enter the registrant's name in the **Registrant Name** box.
5. Enter a description of the registrant in the **Description** box.

Note: The **Description** field is *optional*.

6. Use the **Nature of Client's Business** pulldown menu to select an option that accurately describes the nature of the registrant client's business. See Figure 23.

Note: If none of the options provided accurately describes the nature of the registrant's business, click on the red **+Add New** button and the **Add New Nature of Business** dialog box will appear. See Figure 17. Enter an accurate description of the registrant client's business in the **Nature of Business** box.

7. Unless the registrant client has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, under **IRS Tax Status**, click on the **Registrant is not 501(c)(3)** radio button.

Note: If the registrant client is a 501(c)(3) organization, click on the **501(c)(3) Non-Profit Registrant** radio button and enter the organization's IRS number in the **IRS Number** box. See Figure 18.

8. You must add contact information for the registrant client, including at least A) **one phone number** **and** B) **one email address**. See Figure 19.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.

- c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this registrant client. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this registrant client. See Figures 19 and 20.
 - d) Click the blue **Save Contact Info** button. See Figure 19.
9. Repeat Steps 8a, 8b, 8c and 8d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this registrant client.
10. After you have added all applicable methods of contact for this registrant client – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 19.
- Note:** Clicking the blue **Save Contact Info** button will not permanently save that information to the registrant client's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.
11. You must add at least one work address for the registrant client. See Figure 21.
- a) Enter the registrant's street address or post office box in the **Address Line 1** box.
 - b) Enter the registrant's suite, apartment or unit number in the **Address Line 2** box.
 - c) Enter the registrant's city name in the **City** box.
 - d) Enter the registrant's state in the **State** box.
 - e) Enter the registrant's Zip Code in the **Zip Code** box.
 - f) Use the **Country** pulldown menu to select the registrant's country of residence.
 - g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
 - h) Click the blue **Save Address** button.
- Note:** Clicking the blue **Save Address** button will not permanently save that address to the registrant client's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.
12. Repeat Steps 11a through 11h to add additional addresses for this registrant client.
13. Click the green **Save Registrant Profile** button at the bottom of the page.

My Registrants / Create Registrant: Client

Create Registrant: Client

i Information

Registrant Name:

Description (optional):

Nature of Client's Business:
 + Add New

IRS Tax Status:
☒ Registrant is not 501(c)(3)
☐ 501(c)(3) Non-Profit Registrant

Figure 22. Create Registrant: Client Page

Nature of Client's Business:

+ Add New

Alcohol Beverage Manufacturing

Alcoholic Beverage Wholesalers Trade Association

Alcoholic Beverage Wholesalers Trade Association

Alcoholic Beverage Wholesalers Trade Association

Alcoholic Beverage Wholesalers Trade Association

dress

Figure 23. Nature of Client's Business Pulldown Menu

2.5 How to Delete a Registrant

To delete a Registrant from your User account, follow this process:

1. On the **My Registrants** page, click on the name of the Registrant you want to delete. See Figure 13.

2. The **Registrant Profile** page opens. See Figure 24.
3. Click on the red **Delete Registrant** button.
4. The **Delete** pop-up box appears. See Figure 25.
5. Click on the green **Confirm** button to delete the Registrant.

Note: The LRR system will not allow you to delete a Registrant if it owes any fees to BEGA or if other Lobbyists or Clients are affiliated with the Registrant in the system. See Figure 26.

6. The **My Registrants** page opens, with a banner indicating that Registrant's account has been successfully deleted. See Figure 27.

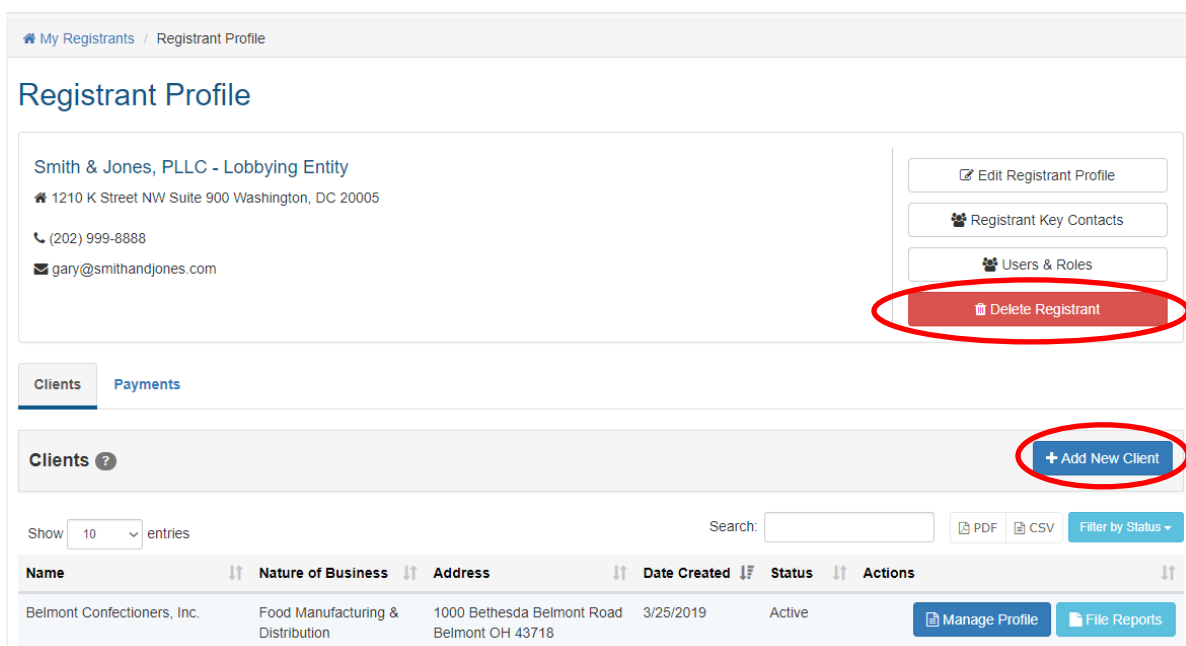


Figure 24. Registrant Profile Page

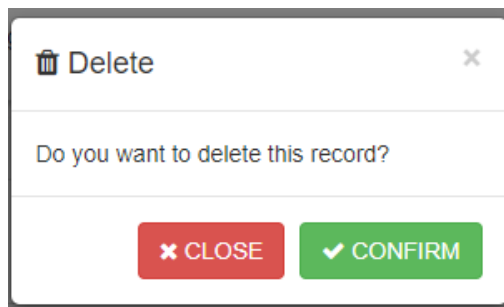


Figure 25. Delete Pop-Up Box

⊗ This account have Clients or Outstanding Balance created, it is not possible to delete this account! ✕

Figure 26. Delete Request Rejection Pop-Up Box

🏠 My Registrants

Welcome, Brent Wolfingbarger

+ Create New Registrant ▾

A Registrant represents the Lobbyist Entity/Individual or Client Business that is registering and filing reports. Once a Registrant has been created, select that Registrant to manage the company profile and the clients that the company represents. A Lobbyist Entity should only Create a New Client Registrant on this page if they are filing their Client's Registration along with their own.

You have access to the following Registrants:

⚠ Account deleted successfully!

Figure 27. Registrant Successfully Deleted Notice

3. Importance of the Registrant Profile Page

Much of the work that Users will perform in the LRR system is centered around the **Registrant Profile** page for each of their affiliated registrants, regardless of whether those registrants are Lobbyists or Clients.

To access the Registrant Profile page for any Registrant affiliated with your User Login:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the Lobbyist Registrant for which you want to create Clients. Or, in the alternative, click on the name of the Client Registrant for which you want to create Lobbyists.
4. The **Registrant Profile** page for the selected registrant opens. See Figure 24.

Perhaps the most significant aspect of the **Registrant Profile** page is that it serves as the gateway to the **Manage Profile** page that you will use to enter the bulk of the information needed to complete the Activity Reports that are filed on behalf of both Lobbyist Registrants and Client Registrants. See the blue **Manage Profile** button in Figures 24 and 31. Additionally, the light blue **File Reports** button on the **Registrant Profile** page serves as a gateway to the **Reports** page where you can generate the Registration Reports and Activity Reports that must be filed with BEGA on behalf of both Lobbyist Registrants and Client Registrants.

3.1 Overview of the Registrant Profile Page for Lobbyist Registrants

On the Registrant Profile page for a *Lobbyist* registrant, there are two tabs directly below the Registrant's contact information: **Clients** and **Payments**. If you click on the **Clients** tab of a *Lobbyist's* Registrant Profile page, the bottom half of the page will populate with any Clients you have created for that Lobbyist registrant. See Figure 28.

As a *Lobbyist* registrant, in order to file **your own** Registration Reports and Activity Reports, you must create profiles for each of your Clients on this page by clicking on the blue **Add New Client** button. See Figure 24.

If Lobbyist Registrants are not planning to submit Registration Reports or Activity Reports on behalf of their Clients, they do not need to follow the process described in Section 2.4 to create separate **Client Registrant** profiles for those lobbyists on their **My Registrants** page. Instead, to be able to file their own Registration Reports and Activity Reports with BEGA, Lobbyist Registrants will need to create new **Client Profiles** for those clients within the framework of their own **Registrant Profile** page.

A Lobbyist Registrant who is not filing Reports with BEGA on behalf of its Clients, but who still needs to file its own Registration Reports and Activity Reports, must follow this process to create new Client Profiles within the Lobbyist's own Registrant Profile page:

1. On the **My Registrants** page, click the name of the Lobbyist Registrant for which you must create Client Profiles to file your own Registration Reports and Activity Reports. See Figure 13.
2. The Lobbyist's **Registrant Profile** page opens. See Figure 24.
3. Click on the blue **Add New Client** button.
4. The **Create Client Profile** page opens. See Figure 28.
5. Enter the name of the Client in the **Registrant Name** box.
6. Enter a description of the Client in the **Description** box.
7. Use the **Nature of Business** pulldown menu to select an option that accurately describes the nature of the Client's business. See Figure 23.

Note: The **Description** field is *optional*.

Note: If none of the options provided accurately describes the nature of the Client's business, click on the red **+Add New** button and the **Add New Nature of Business**

dialog box will appear. See Figure 17. Enter an accurate description of the registrant client's business in the **Nature of Business** box.

8. Unless the Client has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, under **IRS Tax Status**, click on the **Registrant is not 501(c)(3)** radio button.

Note: If the Client is a 501(c)(3) organization, click on the **501(c)(3) Non-Profit Registrant** radio button and enter the organization's IRS number in the **IRS Number** box. See Figure 18.

9. You must add contact information for the Client, including at least A) **one phone number and** B) **one email address**. See Figure 19.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.
 - c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this Client. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this Client. See Figures 19 and 20.
 - d) Click the blue **Save Contact Info** button. See Figure 19.
10. Repeat Steps 8a, 8b, 8c and 8d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this Client.
11. After you have added all applicable methods of contact for this Client – including at least A) **one phone number and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 19.

Note: *Clicking the blue **Save Contact Info** button will not permanently save that information to the Client's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.*

12. You must add at least one work address for the Client. See Figure 21.
 - a) Enter the Client's street address or post office box in the **Address Line 1** box.
 - b) Enter the Client's suite, apartment or unit number in the **Address Line 2** box.
 - c) Enter the Client's city name in the **City** box.
 - d) Enter the Client's state in the **State** box.
 - e) Enter the Client's Zip Code in the **Zip Code** box.
 - f) Use the **Country** pulldown menu to select the Client's country of residence.
 - g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
 - h) Click the blue **Save Address** button.

Note: Clicking the blue **Save Address** button *will not* permanently save that address to the Client's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.

13. Repeat Steps 11a through 11h to add additional addresses for this Client.

14. Click the green **Save Registrant Profile** button at the bottom of the page.

My Registrants / Registrant Profile / Create Client Profile

Create Client Profile

i Information

Registrant Name:

Description (optional):

Nature of Client's Business:

+ Add New

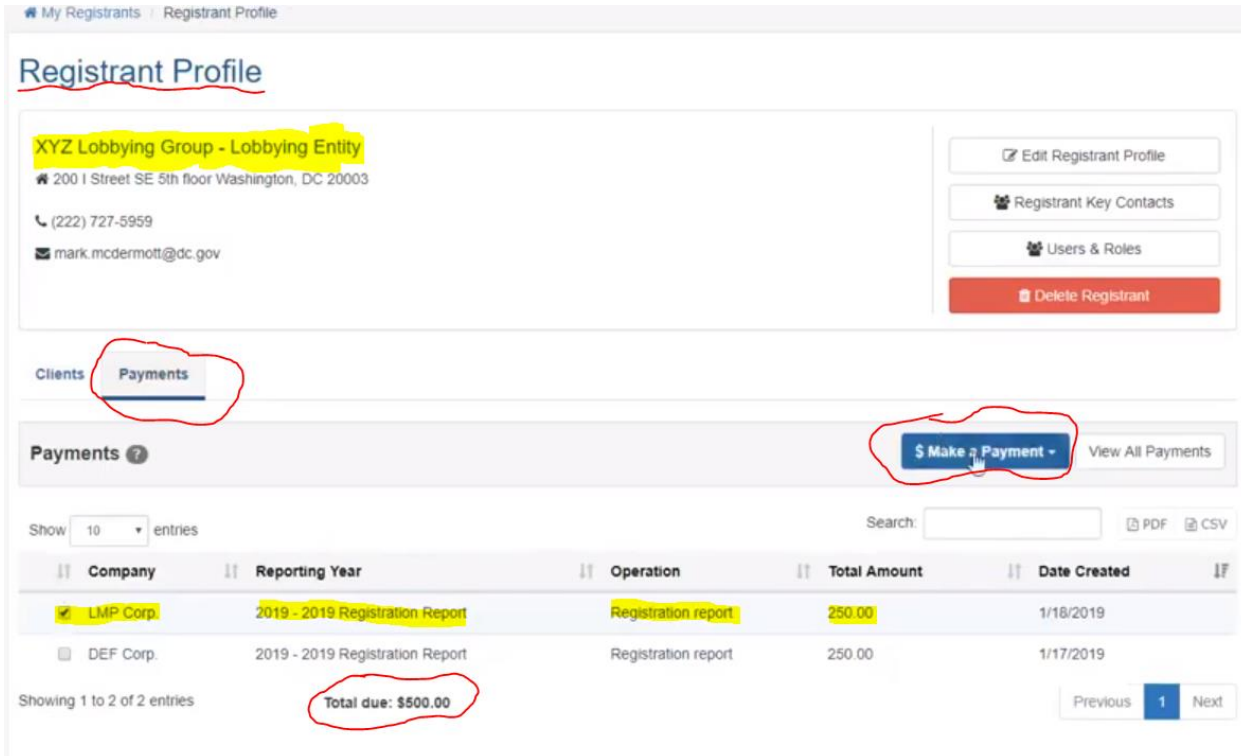
IRS Tax Status:

☒ Registrant is not 501(c)(3)

☐ 501(c)(3) Non-Profit Registrant

Figure 28. Create Client Profile Page

If you click on the **Payments** tab of a *Lobbyist's* Registrant Profile page, the bottom half of the page will populate with any Payments to BEGA that remain unpaid for that Registrant. See Figure 29. To make a payment to BEGA, click on the check boxes beside those fees that you want to include in the payment then press the blue **Make a Payment** button. To view payments that the Registrant previously tendered to BEGA, click on the white **View All Payments** button.



Registrant Profile

XYZ Lobbying Group - Lobbying Entity
 200 I Street SE 5th floor Washington, DC 20003
 (222) 727-5959
 mark.mcdermott@dc.gov

[Edit Registrant Profile](#)
[Registrant Key Contacts](#)
[Users & Roles](#)
[Delete Registrant](#)

Payments

[\\$ Make a Payment](#) [View All Payments](#)

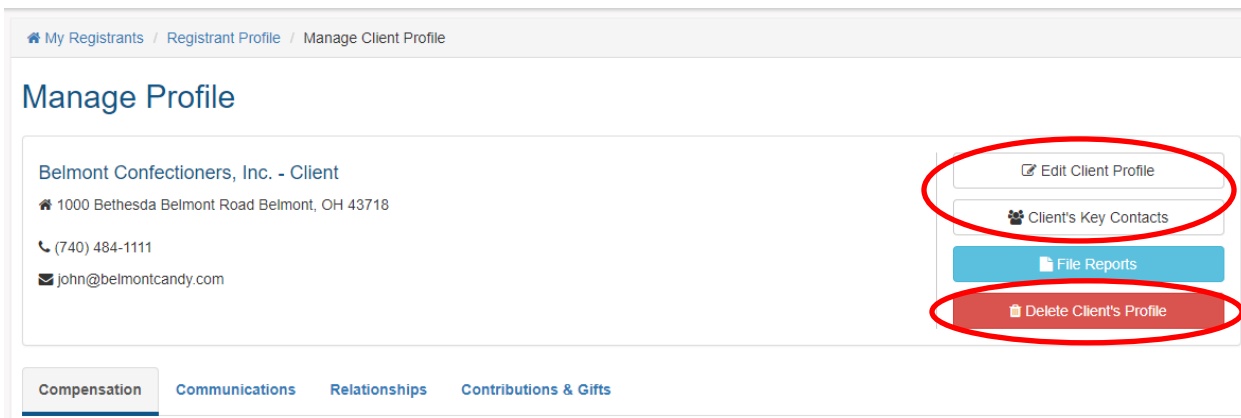
Show 10 entries Search: PDF CSV

Company	Reporting Year	Operation	Total Amount	Date Created
<input checked="" type="checkbox"/> LMP Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/18/2019
<input type="checkbox"/> DEF Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/17/2019

Showing 1 to 2 of 2 entries **Total due: \$500.00** Previous 1 Next

Figure 29. Registrant Profile Page – Payments Tab

You will use the **Client's Manage Profile** page as the starting point for creating **Key Contacts** associated with this Client, or to edit the Client's profile if needed for any reason, using the two white buttons at the top right in Figure 30. These functions are discussed in greater detail elsewhere in these Instructions. Additionally, if you need to delete a Client Profile for some reason from your Lobbyist's **Registrant Profile** Page, you can do so from the Client's **Manage Profile** page by clicking on the red **Delete Client's Profile** button.



Manage Profile

Belmont Confectioners, Inc. - Client
 1000 Bethesda Belmont Road Belmont, OH 43718
 (740) 484-1111
 john@belmontcandy.com

[Edit Client Profile](#)
[Client's Key Contacts](#)
[File Reports](#)
[Delete Client's Profile](#)

Compensation [Communications](#) [Relationships](#) [Contributions & Gifts](#)

Figure 30. Client's Manage Profile Page

3.2 Overview of the Registrant Profile Page for Client Registrants

On the Registrant Profile page for a *Client* registrant, there are two tabs directly below the Registrant's contact information: **Lobbyists** and **Payments**. If you click on the **Lobbyists** tab of a *Client's* Registrant Profile page, the bottom half of the page will populate with any Lobbyists you have created for that Client registrant. See Figure 31.

The screenshot displays the 'Registrant Profile' page for 'Barney Rubble Enterprises - Client'. The contact information includes the address '4000 Bedrock Lane NW Washington, DC 20012', phone '(202) 111-2222', and email 'barney@barney.com'. On the right, there are buttons for 'Edit Registrant Profile', 'Registrant Key Contacts', 'Users & Roles', and 'Delete Registrant'. Below the contact info, there are two tabs: 'Lobbyists' (highlighted with a red circle) and 'Payments'. The 'Lobbyists' section shows a '+ Add New Lobbyist' button (also highlighted with a red circle). Below this is a table of lobbyists with the following data:

Name	Nature of Business	Address	Date Created	Status	Actions
Fred Flintstone	Lobbyist/Attorney	1000 Wilma Lane NW Washington DC 20012	1/31/2019	Active	Manage Profile File Reports

At the bottom, it says 'Showing 1 to 1 of 1 entries' and has pagination controls for 'Previous', '1', and 'Next'.

Figure 31. Client's Registrant Profile Page – Lobbyists Tab

If Client Registrants are not planning to submit Registration Reports or Activity Reports on behalf of the Lobbyists who provide lobbying services on their behalf, they do not need to follow the process described in Sections 2.1 and 2.3 to create separate **Lobbyist Registrant** profiles for those lobbyists on their **My Registrants** page. Instead, to be able to file their own Registration Reports and Activity Reports with BEGA, Client Registrants must create new **Lobbyist Profiles** for those lobbyists within the framework of their own **Registrant Profile** page.

A Client Registrant who is not filing Reports with BEGA on behalf of their Lobbyists, but who still needs to file its own Registration Reports and Activity Reports, must follow this process to create new Lobbyist Profiles within the Client's own Registrant Profile page:

1. On the **My Registrants** page, click the name of the Client Registrant for which you need to create Lobbyist Profiles to file your own Registration Reports and Activity Reports. See Figure 32.
2. The Client's **Registrant Profile** page opens.

3. Click on the blue **Add New Lobbyist** button. See Figure 33.
4. The **Create Lobbyist Profile** page opens. See Figure 34.
5. Enter the Lobbyist's name in the **Registrant Name** box.
6. Under **Registrant Type**, click on the appropriate radio button, depending on whether this Lobbyist is an *Individual Lobbyist* or a *Lobbying Entity*.
7. Enter a description of the Lobbyist registrant in the **Description** box.

Note: The **Description** field is *optional*.

8. Use the **Nature of Business** pulldown menu to select an option that accurately describes the nature of the Lobbyist's business. See Figure 16.

Note: If none of the options provided accurately describes the nature of the Lobbyist's business, click on the red **+Add New** button and the **Add New Nature of Business** dialog box will appear. See Figure 17. Enter an accurate description of the Lobbyist's business in the **Nature of Business** box.

9. Unless the Lobbying Entity has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, under **IRS Tax Status**, click on the **Registrant is not 501(c)(3)** radio button.

Note: If the Lobbying Entity is a 501(c)(3) organization, click on the **501(c)(3) Non-Profit Registrant** radio button and enter the organization's IRS number in the **IRS Number** box. See Figure 18.

10. You must add contact information for the Lobbyist, including at least A) **one phone number and** B) **one email address**. See Figure 19.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figures 19 and 20.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 19.
 - c) Click the **Is Primary** box if you want BEGA to use this contact type as its primary means of communicating with this Lobbyist. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this Lobbyist. See Figures 19 and 21.
 - d) Click the blue **Save Contact Info** button. See Figure 19.

11. Repeat Steps 10a, 10b, 10c and 10d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this Lobbyist.

12. After you have added all applicable methods of contact for this Lobbyist – including at least A) **one phone number and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 19.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the Lobbyist's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.

13. You must add at least one work address for the Lobbyist. See Figure 21.

- Enter the Lobbyist's street address or post office box in the **Address Line 1** box.
- Enter the Lobbyist's suite, apartment or unit number in the **Address Line 2** box.
- Enter the Lobbyist's city name in the **City** box.
- Enter the Lobbyist's state in the **State** box.
- Enter the Lobbyist's Zip Code in the **Zip Code** box.
- Use the **Country** pulldown menu to select the Lobbyist's country of residence.
- Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA.
- Click the blue **Save Address** button.

Note: Clicking the blue **Save Address** button *will not* permanently save that address to the Lobbyist's profile. You must also click the green **Save Registrant Profile** button at the bottom of the page. See Figure 21.

14. Repeat Steps 13a through 13h to add additional addresses for this Lobbyist.

15. Click the green **Save Registrant Profile** button at the bottom of the page.

My Registrants

Welcome, Brent Wolfingbarger

[+ Create New Registrant](#)

A Registrant represents the Lobbyist Entity/Individual or Client Business that is registering and filing reports. Once a Registrant has been created, select that Registrant to manage the company profile and the clients that the company represents. A Lobbyist Entity should only Create a New Client Registrant on this page if they are filing their Client's Registration along with their own.

You have access to the following Registrants:

Show 10 entries Search: PDF CSV Filter by Status

Registrants	Type	Description	Date Created	Status	Active Records
Smith & Jones, PLLC	Lobbying Entity	Lobbying Firm	3/25/2019	Active	1
Belmont Confectioners, Inc.	Client	Candy manufacturers	3/25/2019	Active	1
Napoleon Dynamite Neighborhood Association	Lobbying Entity		2/2/2019	Active	3
Barney Rubble Enterprises	Client		1/31/2019	Active	1

Showing 1 to 4 of 4 entries

Previous 1 Next

Figure 32. My Registrants Page – Client who needs to add Lobbyists to file its own Reports with BEGA

The screenshot shows the 'Registrant Profile' page for 'Belmont Confectioners, Inc. - Client'. The page includes contact information and a sidebar with buttons for 'Edit Registrant Profile', 'Registrant Key Contacts', 'Users & Roles', and 'Delete Registrant'. Below this, there are tabs for 'Lobbyists' and 'Payments'. The 'Lobbyists' tab is active, showing a list of lobbyists with a red circle highlighting the '+ Add New Lobbyist' button.

Figure 33. Client's Registrant Profile Page – Add New Lobbyist Button

The screenshot shows the 'Create Lobbyist Profile' page. It features a form with the following sections: 'Information' (Registrant Name, Description), 'Registrant Type' (Individual Lobbyist, Lobbying Entity), and 'Nature of Business' (dropdown menu, + Add New button). The 'IRS Tax Status' section includes radio buttons for 'Registrant is not 501(c)(3)' and '501(c)(3) Non-Profit Registrant'.

Figure 34. Create Lobbyist Profile Page

If you click on the **Payments** tab of a *Client's* Registrant Profile page, the bottom half of the page will populate with any Payments to BEGA that remain unpaid for that Registrant. See Figure 29. To make a payment to BEGA, click on the check boxes beside those fees that you

want to include in the payment then press the blue **Make a Payment** button. To view payments that the Registrant previously tendered to BEGA, click on the white **View All Payments** button.

You will also use the Lobbyist’s **Manage Profile** page as the starting point for creating **Key Contacts** associated with this Lobbyist, and to edit the Registrant’s profile if needed for any reason, using the two white buttons at the top right in Figure 35. These functions are discussed in greater detail elsewhere in these Instructions. Additionally, if you need to delete a Lobbyist Profile for some reason, you can do so from its **Manage Profile** page by clicking on the red **Delete Lobbyist’s Profile** button. See Figure 35.

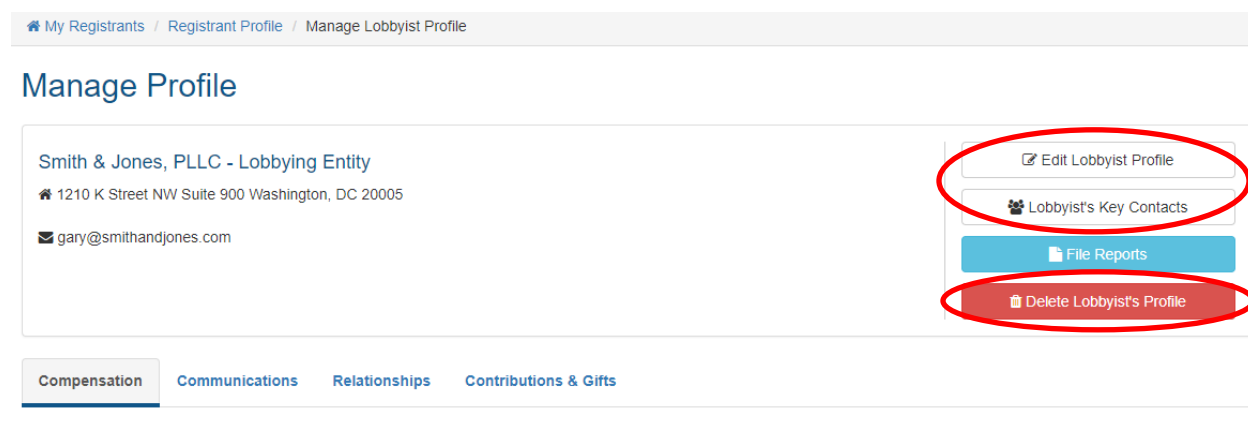


Figure 35. Lobbyist’s Manage Profile Page

4. Adding “Key Contacts” for Registrants

Once you have successfully created a Registrant in the LRR system – regardless if that Registrant is a Lobbyist or a Client – you will need to add information related to its “**Key Contacts**,” who are people that play a role in filing its Registration Reports and Activity Reports with BEGA or in communicating with BEGA. As is the case with most actions you will take in the LRR system, your main “jumping off point” for adding information related to an existing Registrant’s “Key Contacts” is the **My Registrants** page. See Figure 13.

4.1 Concept and Roles of “Key Contacts”

Every Registrant – regardless of whether it is a Lobbying Entity that represents outside clients, a Lobbying Entity that represents itself, an Individual Lobbyist, or a Lobbying Client – must have at least one Key Contact added to their profile. The concept of **Key Contacts** covers four different roles (e.g. **Lobbyist**, **Point-of-Contact (POC)**, **Primary POC** and **Certifier**) and LRR Users can assign different roles to different **Key Contacts**, depending on the precise role(s) those persons play.

Different Types of Key Contacts

1. **Lobbyist:** This term means “any person who engages in lobbying.” See D.C. Official Code § 1–1161.01(33)(A) and (B). The term “lobbying” means “communicating directly with any official in the legislative or executive branch of the District government with the

purpose of influencing any legislative action or an administrative decision.” See D.C. Official Code § 1–1161.01(32)(A).

2. **Point-of-Contact (POC):** A person authorized by the User to receive communications from BEGA on behalf of the registrant in connection with its Lobbying activities.
3. **Primary Point-of-Contact (POC):** The person authorized by the User to serve as the registrant’s primary contact with BEGA in connection with its Lobbying activities.
4. **Certifier:** A person the registrant has authorized to formally attest to the accuracy of the Registration Reports and Activity Reports the registrant is required to file with BEGA.

LRR Users also can establish an optional PIN Code that Key Contacts designated as Certifiers would need to enter into the LRR system before being permitted to certify the accuracy of the registrant’s reports or submit them to BEGA. This is a safeguard established to help prevent unauthorized persons from submitting inaccurate reports to BEGA on the registrant’s behalf.

4.2 How to Create Key Contacts for a Registrant

To create Key Contacts for a Registrant:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the registrant for which you want to create Key Contacts.
4. The **Registrant Profile** page for the selected registrant opens. See Figure 36.
5. Click on the white **Registrant Key Contacts** button.
6. The registrant’s **Key Contacts** page opens. See Figure 37.
7. Click on the blue **Add New Key Contact** button.
8. The registrant’s **Create Key Contact** page opens. See Figure 38.
9. Select the appropriate prefix (e.g. Mr., Mrs., Dr.) for the Key Contact from the **Prefix** pulldown menu.
10. Enter the Key Contact’s first name in the **First Name** box.
11. Enter the Key Contact’s middle name in the **Middle Name** box.
Note: The Middle Name field is *optional*.
12. Enter the Key Contact’s last name in the **Last Name** box.
13. If applicable, select the appropriate suffix (e.g. Jr., II, III) for the Key Contact from the **Suffix** pulldown menu.
14. Click the appropriate check boxes to reflect the roles (e.g. Lobbyist, POC, Primary POC and/or Certifier) that this Key Contact occupies for the registrant. See Figure 39.

15. You must add contact information for the Key Contact, including at least A) **one phone number** **and** B) **one email address**. See Figure 40.

Note: When adding contact information for a Key Contact, you have the option to avoid re-typing info you have already entered on another page (or for another client, etc.) by clicking on the **Choose from profile** link.

- a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figure 40.
- b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 40.
- c) Click the **Is Primary** box if you want BEGA to use this type as its primary means of communicating with this Key Contact. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this Key Contact. See Figure 40.
- d) Click the blue **Save Contact Info** button. See Figure 40.

16. Repeat Steps 15a, 15b, 15c and 15d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this Key Contact.

17. After you have added all applicable methods of contact for this Key Contact – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 40.

Note: *Clicking the blue **Save Contact Info** button will not permanently save that information to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page.* See Figure 41.

18. You must add at least one business address for this Key Contact. See Figure 41.

- a) Enter the Key Contact's street address or post office box in the **Address Line 1** box.
- b) Enter the Key Contact's suite, apartment or unit number in the **Address Line 2** box.
- c) Enter the Key Contact's city name in the **City** box.
- d) Enter the Key Contact's state in the **State** box.
- e) Enter the Key Contact's Zip Code in the **Zip Code** box.
- f) Use the **Country** pulldown menu to select the Key Contact's country of residence.
- g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA for this Key Contact.
- h) Click the blue **Save Address** button.

Note: *Clicking the blue **Save Address** button will not permanently save that address to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page.* See Figure 41.

19. Repeat Steps 18a through 18h to add additional addresses for this Key Contact.

20. Click the green **Save Registrant Profile** button at the bottom of the page.

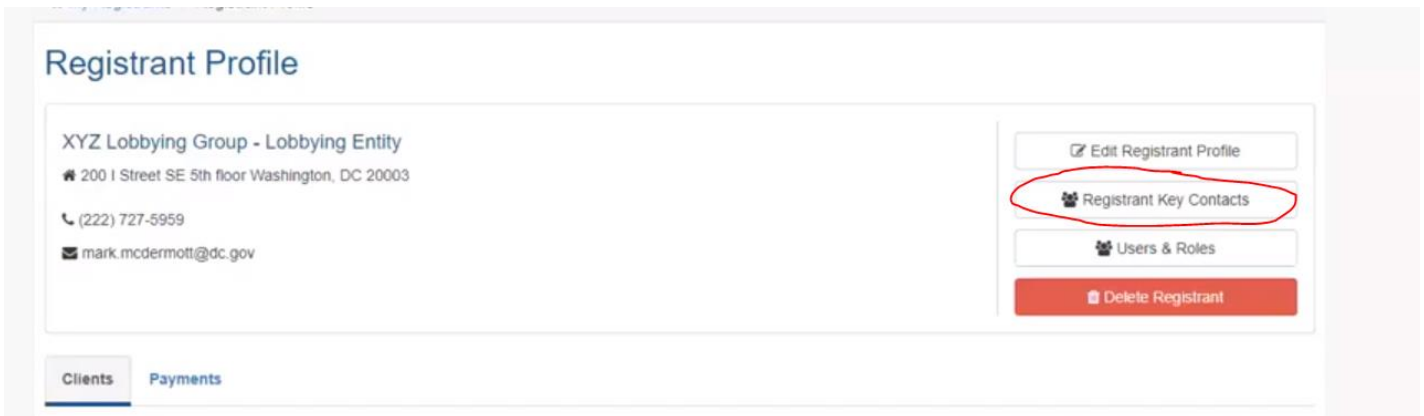


Figure 36. Registrant Profile Page

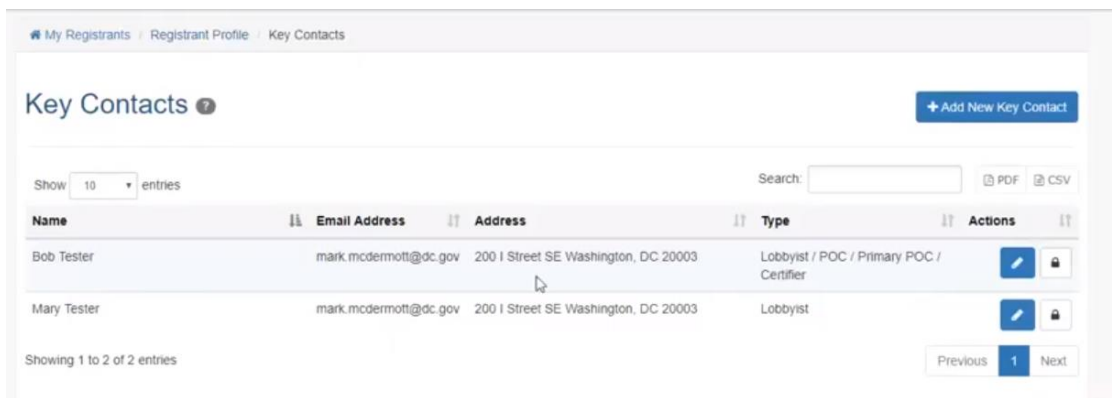


Figure 37. Registrant's Key Contacts Page

My Registrants / Registrant Profile / Key Contacts / Create

Create Key Contact

Key Contact Information

Prefix: First Name: Middle Name: Last Name: Suffix:

Type: ☐ Is a POC: ☐ Is a Lobbyist: ☐ Certifier: ☐ PIN Code (optional):

*(Select at least one)

Figure 38. Create Key Contact Page

Type:

Is a POC: ☒ Is a Primary POC: ☒ Is a Lobbyist: ☒

* (Select at least one)

Certifier

Is a Certifier: ☒

PIN Code (optional): ?

PIN Code (4 digits)

Figure 39. Create Key Contact Page – Role Checkboxes

Contact Info (Phone, Email)

Add at least one phone number and one email address

Add Contact Info

Type:

Is Primary: ☒

Value:

or [Choose from profile](#)

Figure 40. Create Key Contact Page – Contact Info Section

Addresses

Add at least one business address

Add Address

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Country:

Address Type:

or [Choose from profile](#)

Figure 41. Create Key Contact Page – Address Info Section

4.3 How to Create Key Contacts for a Client within the framework of a Lobbyist's Registrant Profile Page

To create Key Contacts for a Client within the framework of a Lobbyist's Registrant Profile page:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the **Lobbyist Registrant** *that performs lobbying services for the Client whose Key Contacts need to be added to the LRR system.*
4. The **Registrant Profile** page for the selected Lobbyist Registrant opens. See Figure 42.
5. At the bottom of the page is a list of that Lobbyist Registrant's Clients. Find the name of the Client whose Key Contacts need to be added to the LRR system and click on the blue **Manage Profile** button for that Client. See Figure 42.
6. The Client's **Manage Profile** page opens. Click on the white **Client's Key Contacts** button. See Figure 43.
7. The Client's **Key Contacts** page opens. See Figure 44.
8. Click on the blue **Add New Key Contact** button.
9. The Client's **Create Key Contact** page opens. See Figure 45.
10. Select the appropriate prefix (e.g. Mr., Mrs., Dr.) for the Key Contact from the **Prefix** pulldown menu.
11. Enter the Key Contact's first name in the **First Name** box.
12. Enter the Key Contact's middle name in the **Middle Name** box.
Note: The Middle Name field is *optional*.
13. Enter the Key Contact's last name in the **Last Name** box.
14. If applicable, select the appropriate suffix (e.g. Jr., II, III) for the Key Contract from the **Suffix** pulldown menu.
15. Click the appropriate check box to reflect the role (POC or Primary POC) that this Key Contact occupies for the registrant. See Figure 45.
Note: *Because the Lobbyist Registrant will be certifying the accuracy of reports submitted on behalf of this Client, there is no option to assign this new Key Contact with the "Certifier" role. The only roles this new Key Contact can be assigned for the Client in the LRR system are "Point of Contact" (POC) and "Primary POC."*
16. You must add contact information for the Key Contact, including at least A) **one phone number** **and** B) **one email address**. See Figure 40.

Note: When adding contact information for a Key Contact, you have the option to avoid re-typing info you have already entered on another page (or for another client, etc.) by clicking on the **Choose from profile** link.

- a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figure 40.
- b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 40.
- c) Click the **Is Primary** box if you want BEGA to use this type as its primary means of communicating with this Key Contact. In the alternative, leave the box unchecked if you would prefer BEGA to use a different contact type as its primary means of communicating with this Key Contact. See Figure 40.
- d) Click the blue **Save Contact Info** button. See Figure 40.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

17. Repeat Steps 16a, 16b, 16c and 16d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this Key Contact.
18. After you have added all applicable methods of contact for this Key Contact – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 28.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

19. You must add at least one business address for this Key Contact. See Figure 41.

- a) Enter the Key Contact's street address or post office box in the **Address Line 1** box.
- b) Enter the Key Contact's suite, apartment or unit number in the **Address Line 2** box.
- c) Enter the Key Contact's city name in the **City** box.
- d) Enter the Key Contact's state in the **State** box.
- e) Enter the Key Contact's Zip Code in the **Zip Code** box.
- f) Use the **Country** pulldown menu to select the Key Contact's country of residence.
- g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA for this Key Contact.
- h) Click the blue **Save Address** button.

Note: Clicking the blue **Save Address** button will not permanently save that address to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

20. Repeat Steps 19a through 19h to add additional addresses for this Key Contact.

21. Click the green **Save Key Contacts Profile** button at the bottom of the page.

My Registrants / Registrant Profile

Registrant Profile

Napoleon Dynamite Neighborhood Association - Lobbying Entity
 4577 Napoleon Way NE Washington, DC 20019
 (202) 112-3456
 ndna20019@gmail.com

Edit Registrant Profile
 Registrant Key Contacts
 Users & Roles
 Delete Registrant

Clients Payments

Clients ? + Add New Client (Using my profile info) + Add New Client

Show 10 entries Search: PDF CSV Filter by Status

Name	Nature of Business	Address	Date Created	Status	Actions
Hocus Pocus Enterprises, LLC	Entertainment	7854 Magic Lane NW Suite 500 Washington DC 20012	3/20/2019	Active	Manage Profile File Reports
Napoleon Dynamite Neighborhood Association	Neighborhood Association	4577 Napoleon Way NE Washington DC 20019	2/2/2019	Active	Manage Profile File Reports

Showing 1 to 2 of 2 entries Previous 1 Next

Figure 42. Lobbyist Registrant Profile Page – Manage Profile Button for Clients

My Registrants / Registrant Profile / Manage Client Profile

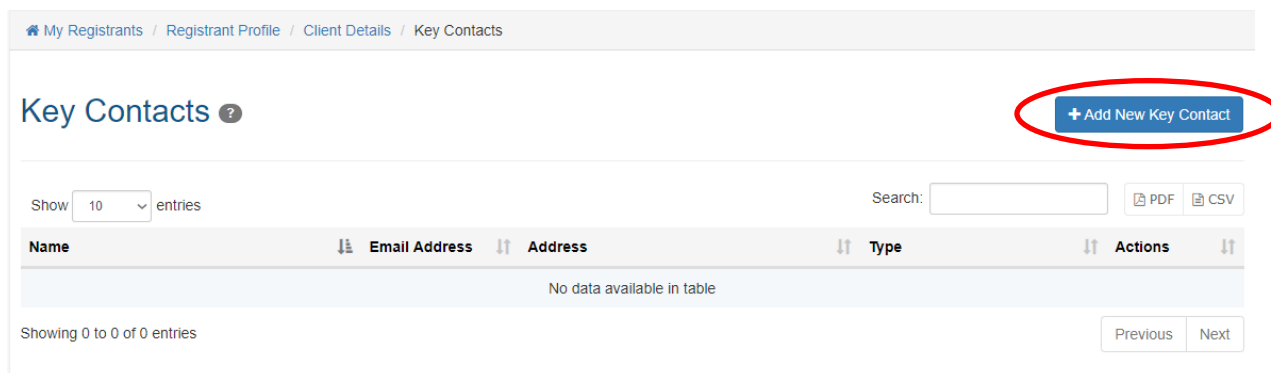
Manage Profile

Hocus Pocus Enterprises, LLC - Client
 7854 Magic Lane NW Suite 500 Washington, DC 20012
 (202) 777-8888
 HocusPocus94@yahoo.com

Edit Client Profile
 Client's Key Contacts
 File Reports
 Delete Client's Profile

Compensation Communications Relationships Contributions & Gifts

Figure 43. Client's Manage Profile Page



My Registrants / Registrant Profile / Client Details / Key Contacts

Key Contacts ?

+ Add New Key Contact

Show 10 entries

Search:

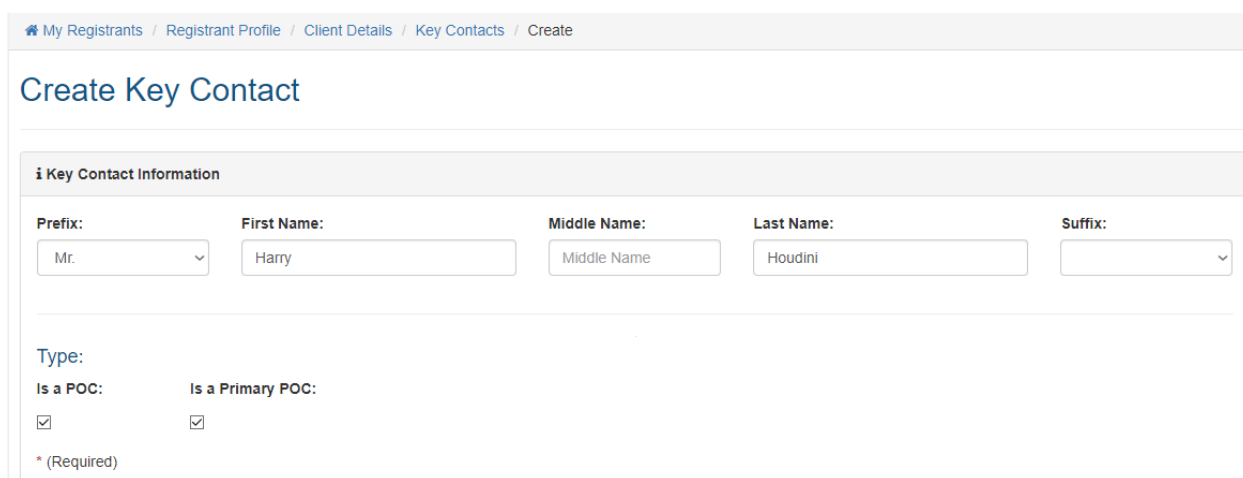
PDF CSV

Name	Email Address	Address	Type	Actions
No data available in table				

Showing 0 to 0 of 0 entries

Previous Next

Figure 44. Client's Key Contacts Page



My Registrants / Registrant Profile / Client Details / Key Contacts / Create

Create Key Contact

i Key Contact Information

Prefix: Mr. First Name: Harry Middle Name: Middle Name Last Name: Houdini Suffix:

Type:

Is a POC: ☒ Is a Primary POC: ☒

* (Required)

Figure 45. Client's Create Key Contact Page

4.4 How to Create Key Contacts for a Lobbyist within the framework of a Client Registrant's Profile Page.

Although Lobbyist Registrants far more frequently manage their clients' profiles in the LRR system, the situation is occasionally reversed, and Client Registrants take on the responsibility for managing their lobbyists' profiles and providing BEGA with information regarding their lobbyists' Key Contacts.

To create Key Contacts for a Client as a Lobbyist Registrant:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.

3. At the bottom of the **My Registrants** page, click on the name of the **Client Registrant** *that receives lobbying services from the Lobbying Entity or Individual Lobbyist whose Key Contacts need to be added to the LRR system.*
4. The **Registrant Profile** page for the selected Lobbyist opens. See Figure 46.
5. At the bottom of the page is a list of that Lobbyist Registrant's Clients. Find the name of the Client whose Key Contacts need to be added to the LRR system and click on the blue **Manage Profile** button for that Client. See Figure 46.
6. The Lobbyist's **Manage Profile** page opens. Click on the white **Lobbyist's Key Contacts** button. See Figure 47.
7. The Lobbyist's **Key Contacts** page opens. See Figure 48.
8. Click on the blue **Add New Key Contact** button.
9. The Lobbyist's **Create Key Contact** page opens. See Figure 49.
10. Select the appropriate prefix (e.g. Mr., Mrs., Dr.) for the Key Contact from the **Prefix** pulldown menu.
11. Enter the Key Contact's first name in the **First Name** box.
12. Enter the Key Contact's middle name in the **Middle Name** box.
Note: The Middle Name field is *optional*.
13. Enter the Key Contact's last name in the **Last Name** box.
14. If applicable, select the appropriate suffix (e.g. Jr., II, III) for the Key Contract from the **Suffix** pulldown menu.
15. Click the appropriate check box to reflect the role (POC) that this Key Contact occupies for the registrant. See Figure 37.
Note: *Because the Client Registrant will be certifying the accuracy of reports submitted on behalf of this Lobbyist, there is no option to assign this new Key Contact with the "Certifier" role. The only roles this new Key Contact can be assigned for the Lobbyist in the LRR system are "Point of Contact" (POC) and "Primary POC."*
16. You must add contact information for the Key Contact, including at least A) **one phone number** **and** B) **one email address**. See Figure 40.
Note: When adding contact information for a Key Contact, you have the option to avoid re-typing info you have already entered on another page (or for another client, etc.) by clicking on the **Choose from profile** link.
 - a) Use the **Type** pulldown menu to select what contact type you are entering (e.g. work phone, mobile phone, email address, etc.) See Figure 40.
 - b) Enter the contact information (e.g. LeBron@NBA.com, 202-555-1212, etc.) in the **Value** box. See Figure 40.
 - c) Click the **Is Primary** box if you want BEGA to use this type as its primary means of communicating with this Key Contact. In the alternative, leave the box unchecked if

you would prefer BEGA to use a different contact type as its primary means of communicating with this Key Contact. See Figure 40.

- d) Click the blue **Save Contact Info** button. See Figure 40.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

17. Repeat Steps 16a, 16b, 16c and 16d to add additional contact methods (e.g. other phone numbers, other email addresses, etc.) for this Key Contact.
18. After you have added all applicable methods of contact for this Key Contact – including at least A) **one phone number** **and** B) **one email address** – click the blue **Save Contact Info** button. See Figure 40.

Note: Clicking the blue **Save Contact Info** button will not permanently save that information to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

19. You must add at least one business address for this Key Contact. See Figure 41.

- a) Enter the Key Contact's street address or post office box in the **Address Line 1** box.
- b) Enter the Key Contact's suite, apartment or unit number in the **Address Line 2** box.
- c) Enter the Key Contact's city name in the **City** box.
- d) Enter the Key Contact's state in the **State** box.
- e) Enter the Key Contact's Zip Code in the **Zip Code** box.
- f) Use the **Country** pulldown menu to select the Key Contact's country of residence.
- g) Use the **Address Type** pulldown menu to select what type of address (e.g. permanent or temporary) you are providing BEGA for this Key Contact.
- h) Click the blue **Save Address** button.

Note: Clicking the blue **Save Address** button will not permanently save that address to the Key Contact's profile. You must also click the green **Save Key Contacts** button at the bottom of the page. See Figure 41.

20. Repeat Steps 19a through 19h to add additional addresses for this Key Contact.
21. Click the green **Save Key Contacts** button at the bottom of the page.

My Registrants / Registrant Profile

Registrant Profile

Barney Rubble Enterprises - Client

4000 Bedrock Lane NW Washington, DC 20012

(202) 111-2222

barney@barney.com

Edit Registrant Profile

Registrant Key Contacts

Users & Roles

Delete Registrant

Lobbyists

Payments

Lobbyists ?

+ Add New Lobbyist

Show 10 entries

Search:

PDF CSV Filter by Status

Name	Nature of Business	Address	Date Created	Status	Actions
Fred Flintstone	Lobbyist/Attorney	1000 Wilma Lane NW Washington DC 20012	1/31/2019	Active	<p>Manage Profile</p> <p>File Reports</p>

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 46. Client's Registrant Profile Page – Manage Profile Button for Lobbyists

My Registrants / Registrant Profile / Manage Lobbyist Profile

Manage Profile

Fred Flintstone - Individual Lobbyist

1000 Wilma Lane NW Washington, DC 20012

(202) 111-3333

fred@fredflintstone.com

Edit Lobbyist Profile

Lobbyist's Key Contacts

File Reports

Delete Lobbyist's Profile

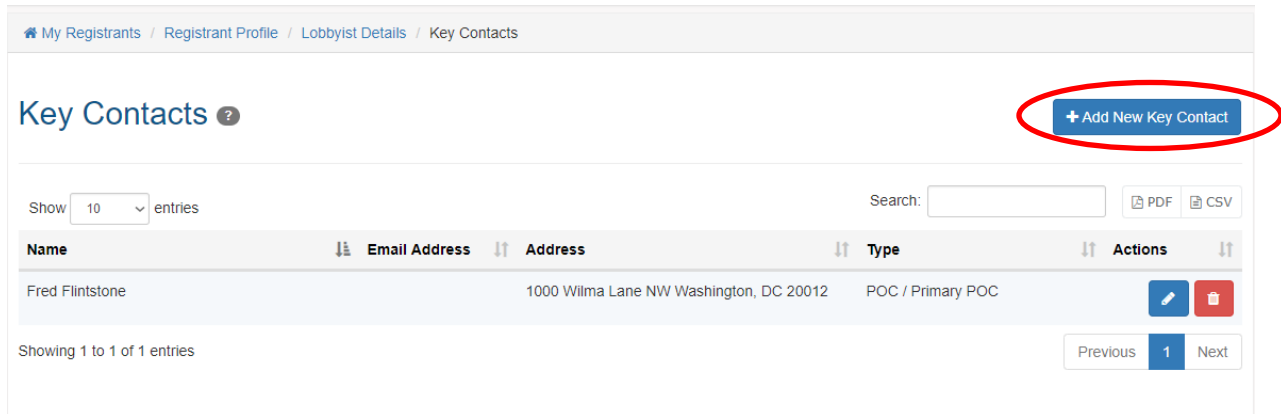
Compensation

Communications

Relationships

Contributions & Gifts

Figure 47. Lobbyist's Manage Profile Page – Top Section



My Registrants / Registrant Profile / Lobbyist Details / Key Contacts

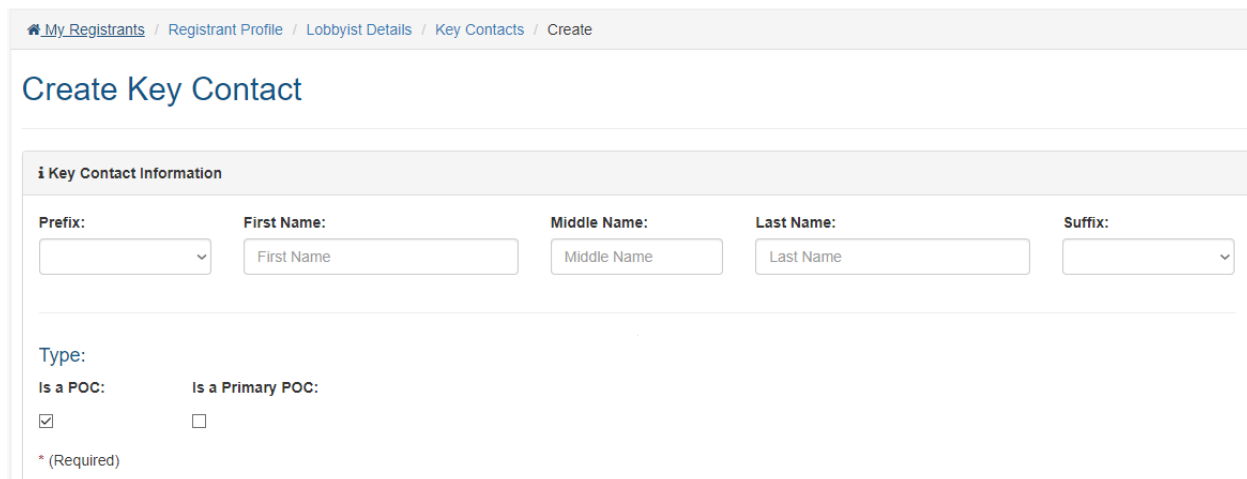
Key Contacts ?

Show 10 entries Search: PDF CSV

Name	Email Address	Address	Type	Actions
Fred Flintstone		1000 Wilma Lane NW Washington, DC 20012	POC / Primary POC	Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

Figure 48. Lobbyist's Key Contacts Page



My Registrants / Registrant Profile / Lobbyist Details / Key Contacts / Create

Create Key Contact

Key Contact Information

Prefix: First Name: Middle Name: Last Name: Suffix:

Type:

Is a POC: ☒ Is a Primary POC: ☐

* (Required)

Figure 49. Lobbyist's Create Key Contact Page

5. Editing Registrant Information

Once you have successfully created a Registrant in the LRR system, it is relatively easy to edit the information added to its profile. As is the case with most actions you will take in the LRR system, your main “jumping off point” for editing an existing Registrant’s profile information is the **My Registrants** page. See Figure 13.

5.1 How to Edit the Information in a Registrant's Profile


To edit the information in a Registrant’s Profile:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.


2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the registrant whose information you want to edit.
4. The **Registrant Profile** page for the selected registrant opens. See Figure 50.
5. Click on the white **Edit Registrant Profile** button.
6. The **Edit Registrant** page opens. See Figure 51.

Note: If you are editing a Lobbyist Registrant's profile, this page's headline will be captioned as **Edit Registrant: Lobbyist**. If you are editing a Client Registrant's profile, this page's headline will be captioned as **Edit Registrant: Client**.

7. If you need to edit the Registrant's name or description, simply edit the information as needed in the applicable text boxes, then click the green **Save Registrant Profile** button at the bottom of the page.
8. If you need to edit the Registrant's registrant type, self-representation status, status (active vs. inactive) or IRS Tax Status, simply click on the applicable radio button, then click the green **Save Registrant Profile** button at the bottom of the page.
9. If you need to edit one of the items stored in the Registrant's **Contact Info** section, click

on the blue **Pencil** icon  beside that contact method, enter the updated info in the **Value** box, then click the blue **Save Contact Info** button and the green **Save Registrant Profile** button at the bottom of the page. See Figure 52.

10. If you need to edit one of the items stored in the Registrant's **Address** section, click on

the blue **Pencil** icon  beside that address, enter the updated info in the **Address** section boxes and pulldown menus, then click the blue **Save Address** button and the green **Save Registrant Profile** button at the bottom of the page. See Figure 53.

My Registrants / Registrant Profile

Registrant Profile

Napoleon Dynamite Neighborhood Association - Lobbying Entity

4577 Napoleon Way NE Washington, DC 20019

(202) 112-3456

ndna20019@gmail.com

Edit Registrant Profile

Registrant Key Contacts

Users & Roles

Delete Registrant

Clients

Payments

Figure 50. Registrant Profile Page

My Registrants / Registrant Profile / Edit Registrant: Lobbyist

Edit Registrant: Lobbyist

i Information

Registrant Name:

Napoleon Dynamite Neighborhood Association

Registrant Type:

☐ Individual Lobbyist
☒ Lobbying Entity

Are you representing your self as a client?

☒ Yes
☐ No

Description (optional):

Description

Status:

☒ Active
☐ Inactive

Nature of Business:



Neighborhood Association + Add New

IRS Tax Status:

☒ Registrant is not 501(c)(3)
☐ 501(c)(3) Non-Profit Registrant

Figure 51. Edit Registrant Page – Top Section

Contact Info (Phone, Email)

ndna20019@gmail.com Type: Email address Is Primary: Yes	
(202) 112-3456 Type: Mobile phone Is Primary: No	

Edit contact info

Type: Is Primary: ☒

Value:

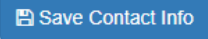



Figure 52. Edit Registrant Page – Contact Info Section

Addresses

4577 Napoleon Way NE Washington, DC 20019 United States of America Type: Permanent Address	
---	---


Edit Address

Address Line 1:

Address Line 2:

City: State: Zip Code:

Country: Address Type:



[Back](#)




[Save Registrant Profile](#)

Figure 53. Edit Registrant Page – Address Section

5.2 How to Edit a Registrant's Key Contacts

To edit a Registrant's Key Contacts:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the registrant whose Key Contacts you want to edit.
4. The **Registrant Profile** page for the selected registrant opens. See Figure 50.

5. Click on the white **Registrant Key Contacts** button.
6. The registrant's **Key Contacts** page opens. See Figure 54.
7. Click on the blue **Pencil** icon  at the end of the row for the Key Contact whose information you want to edit. See Figure 54.
8. The **Edit Key Contact** page opens. See Figure 55.
9. If you need to edit the Key Contact's name or roles simply edit the information as needed in the applicable text boxes and check boxes, then click the green **Save Key Contacts** button at the bottom of the page.
10. If you need to edit one of the items stored in the Key Contact's **Contact Info** section, click on the blue **Pencil** icon  beside that contact method, enter the updated info in the **Value** box, then click the blue **Save Contact Info** button and the green **Save Registrant Profile** button at the bottom of the page. See Figures 56 and 57.
11. If you need to edit one of the items stored in the Registrant's **Address** section, click on the blue **Pencil** icon  beside that address, enter the updated info in the **Address** section boxes and pulldown menus, then click the blue **Save Address** button and the green **Save Key Contacts** button at the bottom of the page. See Figure 57.

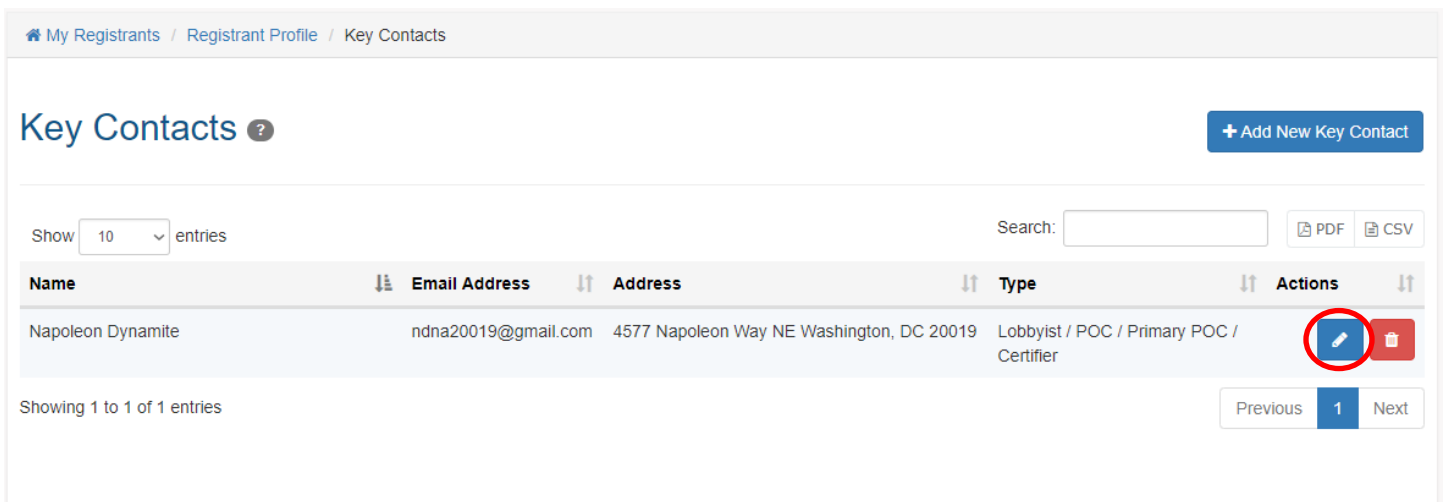


Figure 54. Key Contacts Page – Editing a Key Contact

Edit Key Contact

Key Contact Information

Prefix: Mr. ▾	First Name: Napoleon	Middle Name: Middle Name	Last Name: Dynamite	Suffix: ▾
------------------	-------------------------	-----------------------------	------------------------	--------------

Type:
Is a POC: ☒ Is a Primary POC: ☒ Is a Lobbyist: ☒
* (Select at least one)

Certifier
Is a Certifier: ☒ PIN Code (optional): ?

PIN Code (4 digits)

Figure 55. Edit Key Contact Page – Top Section

Contact Info (Phone, Email)

ndna20019@gmail.com Type: Email address Is Primary: Yes	<div> <div></div> <div></div> </div>
(202) 112-3456 Type: Mobile phone Is Primary: No	<div> <div></div> <div></div> </div>

Edit contact info

Type: Email address ▾ Is Primary: ☒


Value: ndna20019@gmail.com

Save Contact Info

Figure 56. Edit Key Contact Page – Contact Info Section

Addresses

4577 Napoleon Way NE
Washington, DC 20019
United States of America

Type: Permanent Address

Add Address

Address Line 1:

Address Line 2:


City:

State:

Zip Code:

Country:

Address Type:

 Save Address or [Choose from profile](#)

[Back](#)

[Save Key Contacts](#)

Figure 57. Edit Key Contact Page – Address Section

6. Creating Multiple Users for a Registrant

Once you have successfully created a Registrant in the LRR system, you can authorize multiple people to serve as users for the Registrant. As is often the case, your main “jumping off point” for creating multiple users for a single registrant is the **My Registrants** page. See Figure 13.

6.1 How to Create Multiple Users for a Registrant

To create multiple users for a Registrant:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the registrant for whom you want to create multiple users.
4. The **Registrant Profile** page for the selected registrant opens. See Figure 50.
5. Click on the white **Users & Roles** button.
6. The **Users & Roles** page opens. See Figure 58.
7. Click on the blue **Add New User** button.

8. The **USER** dialog box appears. See Figure 59.
9. Enter the new user's first name in the **First Name** box.
10. Enter the new user's last name in the **Last Name** box.
11. Enter the new user's email address in the **Email** box.
12. Use the **Permission on this registrant** pulldown menu to set the new user's role for this Registrant (e.g. Admin, View, or View and Edit).
13. Click the green **SAVE** button at the bottom of the USER dialog box.

Note: After you create a new user for this Registrant, that person will receive an email from BEGA asking them to confirm their email address and create a password for their newly-established LRR User Login. To gain access to the LRR system, the new user you have created will need to complete **Steps 9 through 20** in the process **“To log into LRR if a User Account does not already exist for your email address”** described in Section 1.1 on pages 6 and 7 above.

14. The Registrant's **Users & Roles** page will open, and the new User you created will appear in the table at the bottom of the page. See Figure 60.
15. Once the new user completes that process and successfully logs into the LRR system, his/her **My Registrants** page opens, and the Registrant for which you have authorized him/her to serve as a User will appear on that page. See Figure 61.

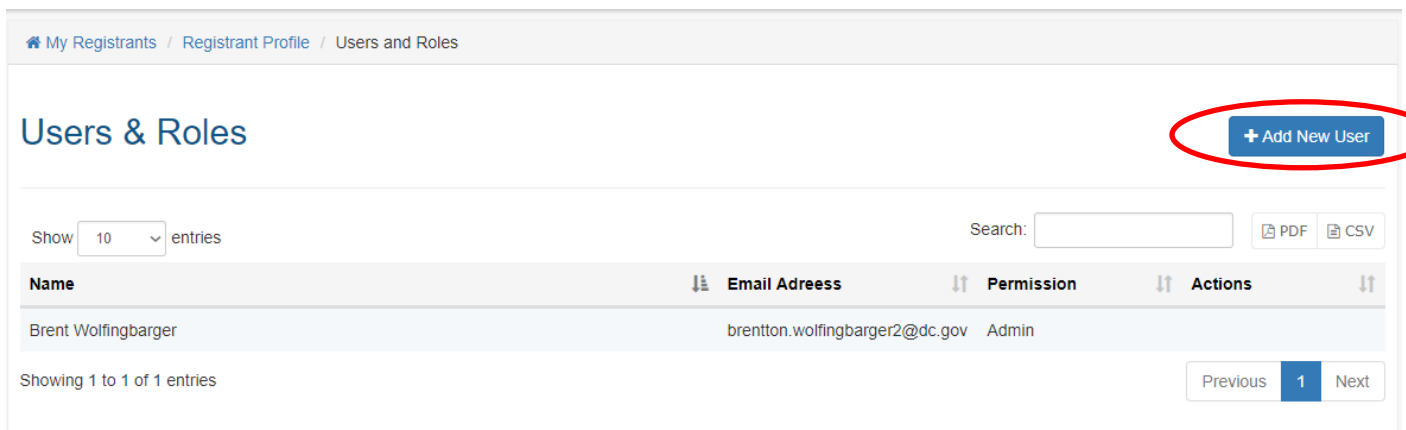


Figure 58. Users & Roles Page

USER

First name:
First Name

Last name:
Last Name

Email:
Email

Permission on this registrant:
Admin
Admin
View
View and Edit

CLOSE **SAVE**

Figure 59. USER dialog box

My Registrants / Registrant Profile / Users and Roles

Users & Roles

[+ Add New User](#)

Show 10 entries Search: PDF CSV

Name	Email Address	Permission	Actions
Abraham Lincoln	WVAttorney@aol.com	View	View Delete
Brent Wolfingbarger	brentton.wolfingbarger2@dc.gov	Admin	

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 60. Users & Roles Page – New User Successfully Added

My Registrants

Welcome, Abraham Lincoln

[+ Create New Registrant](#)

A Registrant represents the Lobbyist Entity/Individual or Client Business that is registering and filing reports. Once a Registrant has been created, select that Registrant to manage the company profile and the clients that the company represents. A Lobbyist Entity should only Create a New Client Registrant on this page if they are filing their Client's Registration along with their own.

You have access to the following Registrants:

Show 10 entries Search: PDF CSV Filter by Status

Registrants	Type	Description	Date Created	Status	Active Records
Napoleon Dynamite Neighborhood Association	Lobbying Entity		2/2/2019	Active	2

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 61. New User's My Registrants Page

7. Importance of the Manage Profile Page

Some of the most important work that Users will perform in the LRR system is centered around the **Manage Profile** page for each of their affiliated registrants, regardless of whether those registrants are Lobbyists or Clients.

To access the Manage Profile page for any Registrant affiliated with your User Login:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the registrant on which you want to work.
4. The **Registrant Profile** page for the selected registrant opens. See Figures 42 & 46.
5. Click on the blue **Manage Profile** button.
6. The **Manage Profile** page opens. See Figures 43 and 47.

It is important to note that the **Manage Profile** page functions to allow Lobbying Registrants to manage the profiles of their affiliated Clients, and *vice versa* to allow Client Registrants to manage the profiles of their affiliated Lobbyists. If a Registrant wants to “manage” its own profile, it can do so by opening its own **Registrant Profile** page, then clicking on the white **Edit Registrant Profile** button. See Section 5.1 above.

7.1 Overview of the Manage Profile Page as used by Lobbyist Registrants

When a Lobbyist Registrant opens the **Manage Profile** page for an affiliated Client, the page is essentially divided into two sections. The top section depicted in Figure 43 reflects the Client’s contact information, and contains four buttons:

1. A white Edit Client Profile button;
2. A white Client’s Key Contacts button;
3. A light blue File Reports button; and
4. A red Delete Client’s Profile button.

The bottom section of the **Manage Profile** page contains four tabs for **Compensation**, **Communications**, **Relationships** and **Contributions & Gifts**. These are the main four tabs that Lobbyists will deal with when managing a Client’s profile. See Figures 43 & 47. Of these four tabs, the **Compensation Tab** is the most important for reasons discussed below.

7.1.1 Using the Compensation Tab

The **Compensation Tab** is the most important of the four tabs on the **Manage Profile** page. *It must be stressed that the LRR system will not allow you to file a Registration Report or an Activity Report for a Client unless you have first created and saved a Compensation record for that client.* The other three tabs are optional, and you can submit a Registration Report or an Activity Report even if the other three tabs are completely empty. But you must submit all the information required to complete a Compensation record reflecting the nature of compensation you received from your Client or you will not be able to submit either a Registration Report or an Activity Report for that Client.

To submit information regarding the compensation a Lobbyist Registrant received from a Client, follow this process:

1. On the Client's **Manage Profile** page, click on the **Compensation Tab**.
2. Click on the blue **Add New Compensation** button.
3. The **Add New Compensation** dialog box will appear. See Figure 62.
4. You must first select a **Compensation Resource** from the pulldown menu at the top of the **Add New Compensation** dialog box. See Figure 63.
5. Use the **Type of Report Compensation** pulldown menu to select what type of Report you are going to file in connection with this Compensation Record. See Figure 64.
6. Enter the **Start Date** for your agreement with the Client, as well as the **End Date** in the appropriate boxes.

Note: *It is important to remember that if you want to submit a 2019 Registration Report, at least one of the dates in the Compensation Record related to that Report must occur during the 2019 Calendar Year. Otherwise, the system will reject the Report when you try to submit it. Ditto for an Activity Report, in that at least one of the dates in the Compensation Record for that Report must occur during that quarterly reporting period.*

7. Enter the **Compensation Amount** you have received from the Client in the applicable box.
8. Use the **Compensation Type** pulldown menu to report what type of compensation (e.g. Annual Fee, Monthly Fee, Annual Retainer, etc.) you received from the Client.

Note: At the beginning of the year, you may not yet know how much compensation you are going to receive. If that is the case, you'll need to click the checkbox for **Compensation Amount is unknown at the time of registration** and then provide more detailed information regarding the amount of compensation you receive when you file your quarterly Activity Reports.

9. Use the **Lobbying Matters** pulldown menu to select the particular Lobbying Matter on which you worked for the Client. If no option is applicable, click the **Add new** link and draft a new description for the Lobbying Matter.

10. Click the green **Save** button at the bottom of the box, which will cause that Compensation Record to be added at the bottom of your Client's **Manage Profile** page on the **Compensation Tab** under **Compensation Details**. See Figure 65.

Note: *You can create more than one Compensation Record if you want to list more than one Lobbyist on an Activity Report. Just repeat this process for each Lobbyist.*

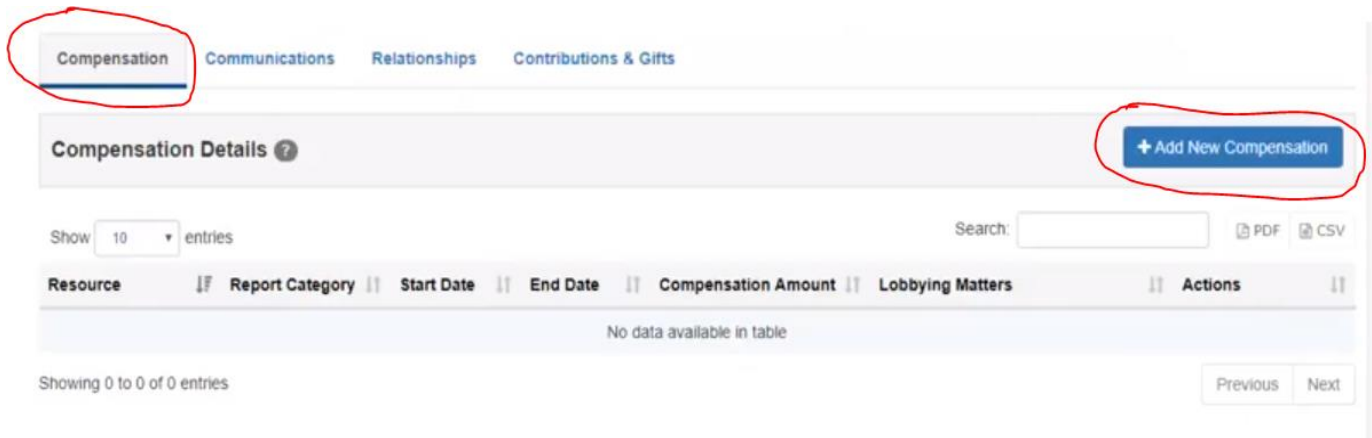


Figure 62. Manage Profile Page – Compensation Tab

The 'Add New Compensation' dialog box is shown. It contains the following fields and options:

- Compensation Resource:** A dropdown menu with 'LMP Corp.' selected.
- Start of Agreement (mm/dd/yyyy):** A date input field.
- End of Agreement (mm/dd/yyyy):** A date input field.
- Compensation Amount:** A text input field with a '\$' symbol.
- Compensation Type:** A dropdown menu with 'Select a Compensation Type'.
- Compensation Amount is unknown at the time of registration:** A checkbox.
- Lobbying Matters:** A dropdown menu with 'Select a Lobbying Matters'.
- Buttons:** 'CLOSE' (red) and 'SAVE' (green).

Figure 63. Add New Compensation Dialog Box – Compensation Resource Menu

The dialog box titled "Add New Compensation" contains the following fields and options:

- Compensation Resource:** A dropdown menu with "Bob Tester" selected.
- Type of Report Compensation:** A dropdown menu with a list showing "Select a Report Category", "Select a Report Category", "Registration Report" (highlighted in blue), and "Activity Report".
- Compensation Amount:** A text input field with a "\$" symbol.
- Compensation Type:** A dropdown menu with "Select a Compensation Type" as the placeholder.
- ☐ **Compensation Amount is unknown at the time of registration** (with a help icon).
- Lobbying Matters:** A dropdown menu with "Select a Lobbying Matters" as the placeholder. To the right are links for "Edit Selected" and "+ Add new".

At the bottom right are two buttons: a red "CLOSE" button and a green "SAVE" button.

Figure 64. Add New Compensation Dialog Box – Type of Report Compensation Menu

The "Manage Profile" page for "LMP Corp. - Client" displays client information and a list of compensation records. The "Compensation" tab is active.

Client Information:

- LMP Corp. - Client**
- 200 I Street SE 5th floor Washington, DC 20003
- (222) 222-2222
- mark.mcdermott@dc.gov

Actions: Edit Client Profile, Client's Key Contacts, File Reports, Delete Client's Profile.

Compensation Details: A table with columns: Resource, Report Category, Start Date, End Date, Compensation Amount, Lobbying Matters, and Actions. One record is shown, circled in red:

Resource	Report Category	Start Date	End Date	Compensation Amount	Lobbying Matters	Actions
Bob Tester	Registration Report	1/1/2019	12/31/2019	0 / Monthly Retainer	Matters related to Technology	[Edit] [Delete]

Buttons: + Add New Compensation, Show 10 entries, Search, PDF, CSV, Previous, 1, Next.

Figure 65. Manage Profile Page – New Compensation Record

7.1.2 Using the Communications Tab

The **Compensation Tab** is used to enter your communications with District officials for inclusion on your Client's Activity Reports. You can either manually enter your Communications one-at-a-time via the blue **Add New Communication** button, or you can upload them all at once using BEGA's standard template spreadsheet.


To manually enter your Client's Communications one-at-a-time:

1. On the Client's **Manage Profile** page, click on the **Communications Tab**.
2. Make sure the **Current** subtab is selected, not the **Import Communication** subtab. See Figure 66.
3. Click on the blue **Add New Communication** button.
4. The **Add New Compensation** dialog box will appear. See Figure 67.
5. Select the name of the District official with whom you communicated on behalf of your Client from the **Official** pulldown menu.

Note: If the District official with whom you communicated is not listed in the pulldown menu, please create a Support Ticket and provide OCTO with that person's name, agency and title so we can update the pulldown menu accordingly.

6. Select the means by which this communication occurred (e.g. email, phone call, attendance at an event, etc.) from the **Type** pulldown menu.

Note: If none of the options in the **Type** menu accurately describe the means by which this communication occurred, click on the **Add New** link and the **Add New Type of Communication** box will appear. Enter a description of the new type of communication,

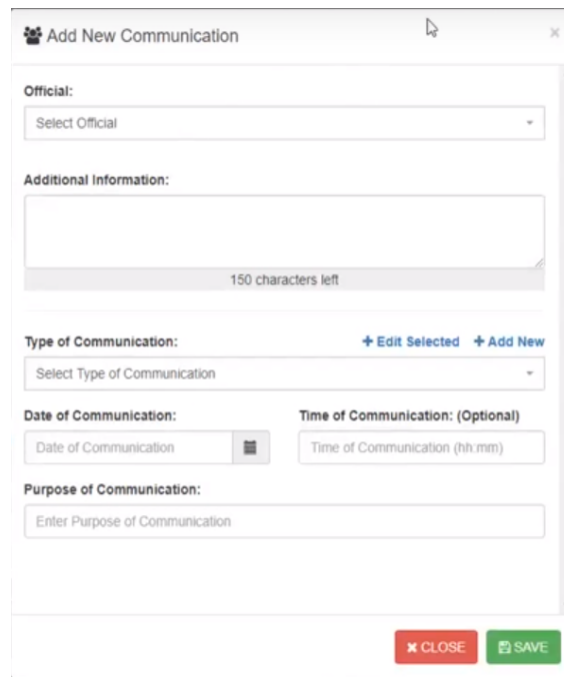
then click on the green Checkmark  box to add this new method of communication to the **Type** pulldown menu. Return to the **Type** pulldown menu and select the new method of communication you just added.

7. Enter the date this communication occurred in the **Date of Communication** box.

Note: Clicking on the gray calendar  icon will cause a calendar pop-up box to appear which you can use to select the applicable date as opposed to manually entering it.

8. Enter the time this communication occurred in the **Time of Communication** box, which is optional but not required.
9. Enter the purpose of this communication in the **Purpose of Communication** box.
10. Enter any additional information you believe is pertinent to this communication or will provide additional needed context in the **Additional Information** box.

11. Click the green Save button, which will cause that Communication Record to be added at the bottom of your Client's **Manage Profile** page on the **Communication Tab** under **Compensation Details**. See Figure 68.



The dialog box is titled "Add New Communication" and contains the following fields and controls:

- Official:** A dropdown menu with the placeholder text "Select Official".
- Additional Information:** A large text area for notes, with a "150 characters left" indicator at the bottom.
- Type of Communication:** A dropdown menu with the placeholder text "Select Type of Communication". To the right of this dropdown are two links: "+ Edit Selected" and "+ Add New".
- Date of Communication:** A date picker field with the placeholder text "Date of Communication".
- Time of Communication: (Optional)** A time input field with the placeholder text "Time of Communication (hh:mm)".
- Purpose of Communication:** A text area with the placeholder text "Enter Purpose of Communication".
- Buttons:** At the bottom right, there are two buttons: a red "X CLOSE" button and a green "SAVE" button.

Figure 66. Add New Communication Dialog Box

Add New Communication

Official:
Select Official

Additional Information:

150 characters left

Type of Communication:
+ Edit Selected
+ Add New

Select Type of Communication

Add new type of communication:

Date of Communication:
Time of Communication: (Optional)

Enter Purpose of Communication

CLOSE
SAVE

Figure 67. Add New Type of Communication Box

My Registrants / Registrant Profile / Manage Client Profile

Manage Profile

Hocus Pocus Enterprises, LLC - Client
7854 Magic Lane NW Suite 500 Washington, DC 20012
(202) 777-8888
HocusPocus94@yahoo.com

Edit Client Profile
Client's Key Contacts
File Reports
Delete Client's Profile

Compensation
Communications
Relationships
Contributions & Gifts

Current
Import Communication

Communications with DC Officials ?
+ Add New Communication

Show 10 entries
Search:
PDF
CSV

Official's Name	Official's Agency	Official's Title	Type	Date	Time	Purpose	Actions
Brian Flowers	BEGA	General Counsel	Email	3/13/2019		To discuss upcoming training for the LRR e-filing	

Showing 1 to 1 of 1 entries
Previous
1
Next

Figure 68. Manage Profile Page – New Communication Record

To use BEGA's standard template spreadsheet to upload all your Client's Communications at once:

1. On the Client's **Manage Profile** page, click on the **Communications Tab**.
2. Make sure the **Current** subtab is selected, not the **Import Communication** subtab. See Figure 69.
3. Click on the blue **Options** button, which causes a pop-up box to appear. See Figure 69.
4. Click on the **Download Contact Import Template** option in the pop-up box.
5. BEGA's template spreadsheet will be downloaded onto your computer, most likely in your Downloads folder.
6. Open the folder where BEGA's template spreadsheet was downloaded, then double-click on the file and it will open the file in Excel. See Figure 70.

Note: The top column reflects the field names in our database and must not be edited.

7. Enter all communications related to the lobbying services you performed for your Client, then save the file on your computer.
8. Click on the blue **Options** button again, then select the **+Import New Contacts** option from the **Options** pop-up box. See Figure 71.
9. The **Import Contacts** pop-up box will appear. See Figure 72.
10. Click on the grey **Choose File** button, then select a spreadsheet from your computer to import into the LRR system.

Note: *Be sure your spreadsheet complies with all the file structure requirements described in the **Import Contacts** pop-up box, particularly the maximum number of characters you can enter in each of the spreadsheet's fields.*

11. When you double-click on the spreadsheet's name, it will appear in the box beside the **Choose** file button. See Figure 72.
12. Click on the green **IMPORT** button at the bottom of the **Imports Contact** pop-up box.
13. The Manage Profile page opens, and the communications contained in your spreadsheet will be listed at the bottom of the page under the title **Imported Communications**. See Figure 63. All communications from the spreadsheet that complied with the database's file structure requirements are identified with a green **Ready to move** status.
14. Click on the blue **Options** button again, then select the **Select All Ready to Move** option from the **Options** pop-up box. See Figure 71.
15. Checks will appear in checkboxes under the Actions column for all communications that are ready to be moved into the LRR. See Figure 73.
16. Click on the blue **Options** button again, then select the **Move contacts to current** option from the **Options** pop-up box. See Figure 71.

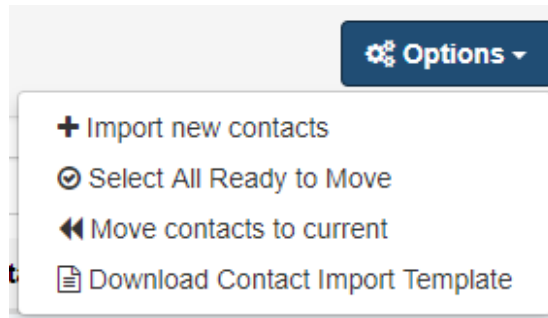


Figure 71. Options Pop-Up Box

Import contacts

Select a XLS or XLSX file with your contacts:

Make sure to follow this file structure for contacts before import!

- 📄 **Download Contact Import Template**
- Columns header on the first line of xls/xlsx file: **firstname lastname title agency type date time purpose**
- Keep the columns even if it don't have any value
- A validation will be done before import your contacts.

Column	firstname	lastname	title	agency	type	date	time	purpose
Type	Text	Text	Text	Text	Text	Text	Text	Text
Max Length (characters)	50	50	250	50	255	10	5	255
Sample	David	Anderson	Director	ABRA	Possible values: Download template file to see all possible	7/19/2018 (mm/dd/yyyy)	2:40 (hh:mm) optional value	Talk about lobbyist meeting

Figure 72. Import Contacts Pop-up Box

[My Registrants](#) / [Registrant Profile](#) / [Manage Client Profile](#)

Manage Profile

Hocus Pocus Enterprises, LLC - Client

7854 Magic Lane NW Suite 500 Washington, DC 20012

(202) 777-8888

HocusPocus94@yahoo.com

[Edit Client Profile](#)
[Client's Key Contacts](#)
[File Reports](#)
[Delete Client's Profile](#)
[Compensation](#) [Communications](#) [Relationships](#) [Contributions & Gifts](#)
[Current](#) [Import Communication](#)

Imported Communication ?

[Options](#)

Show 10 entries

Search:

[PDF](#) [CSV](#)

Name	Agency	Title	Type	Date	Purpose	Status	Actions
Donald Alberti	OCTO	Director	Not identified	7/20/2018	test purpose	Pending	Edit Delete
Camille Short	ABRA	Board Member	Meeting	7/19/2018	test purpose2	Ready to move	<input checked="" type="checkbox"/> Edit Delete
Hobson Fred	ABRA	Board Member	Social Media (includes Twitter, Facebook, etc.)	7/19/2018	test purpose2	Ready to move	<input checked="" type="checkbox"/> Edit Delete
Perry James	ABRA	Board Member	Social Media (includes Twitter, Facebook, etc.)	7/19/2018	test purpose22	Ready to move	<input checked="" type="checkbox"/> Edit Delete

Showing 1 to 4 of 4 entries

Previous 1 Next

Figure 73. Imported Communications Ready to be Moved into LRR System

Once your Client's communications with District officials have been entered into the LRR system – either individually or via the spreadsheet import option – they will be visible on your Client's **Manage Profile** page on the **Communications** tab by clicking on the subtab, appearing under the heading "Communications with DC Officials." See Figure 74.

However, please note that until you Certify & Submit an Activity Report to BEGA that contains a particular communication, you will still be able to edit or delete that communication from the LRR system by clicking on either the blue **Edit** [Edit](#) button or the red **Delete** [Delete](#) button under the **Actions** column.

Manage Profile

LMP Corp. - Client
 200 I Street SE 5th floor Washington, DC 20003
 (222) 222-2222
 mark.mcdermott@dc.gov

[Edit Client Profile](#)
[Client's Key Contacts](#)
[File Reports](#)
[Delete Client's Profile](#)

[Compensation](#)
[Communications](#)
[Relationships](#)
[Contributions & Gifts](#)

[Current](#)
[Import Communication](#)

Communications with DC Officials [+ Add New Communication](#)

Show 10 entries Search: PDF CSV

Official's Name	Official's Agency	Official's Title	Type	Date	Time	Purpose	Actions
Brian Flowers	BEGA	General Counsel	Email	12/4/2018		To discuss upcoming legislation	Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

Figure 74. Current Subtab – Communications with DC Officials

7.1.3 Using the Relationships Tab

Both Lobbyist Registrants and Client Registrants are required to report any “business relationship” or “professional services relationship” they have with any official working in the District’s executive or legislative branches, or with any member of such an official’s staff, including both personal and committee staff members. For purposes of the District’s Lobbying Registration & Reporting program, the term “business relationship” means a relationship established to provide business services. The term “professional services relationship” means a relationship where the functions are infrequent, technical or unique and, primarily performed by independent contractors or by consultants whose occupation is the rendering of such services.


You will use the **Relationships** tab within the framework of the Registrants’ respective **Manage Profile** pages to enter information into the LRR system regarding the relationships, if any, that exist between your Registrants and District government officials.

7.1.3.1 Using the Relationships Tab for Activity Reports Being Filed by Lobbyist Registrants

To enter information regarding a *Lobbyist* Registrant’s Relationships with D.C. government officials, follow this process:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.

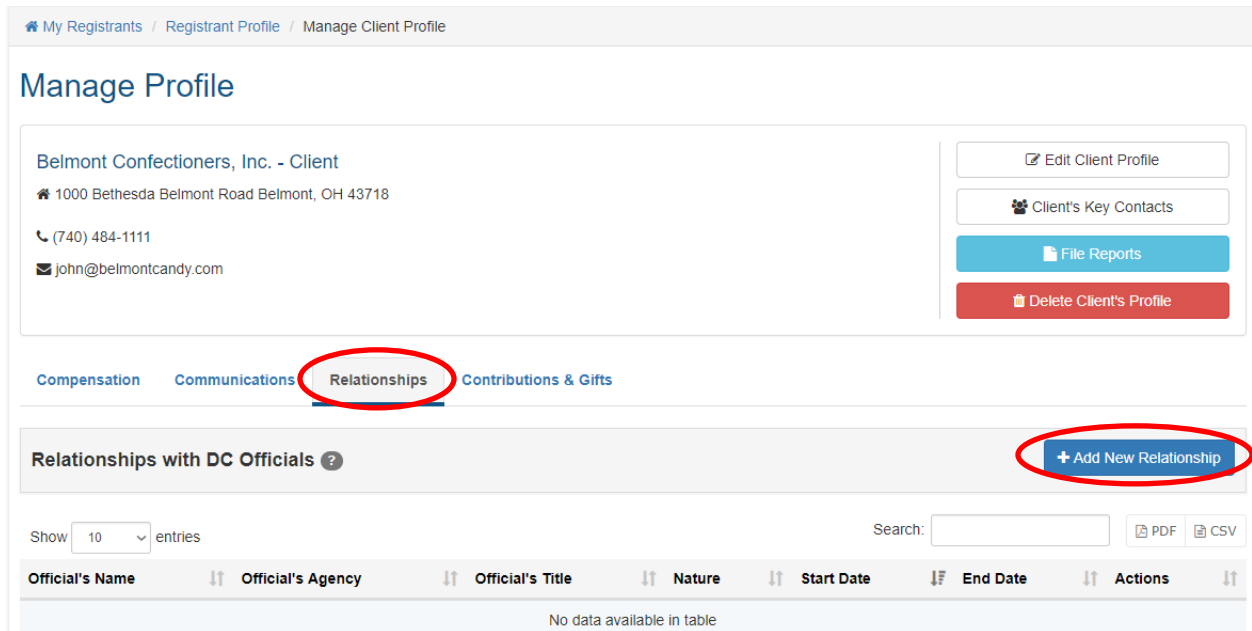
3. At the bottom of the **My Registrants** page, click on the name of the Lobbyist Registrant whose relationships you need to enter into the LRR system.
4. The **Registrant Profile** page for the selected Lobbyist opens. See Figure 42.
5. Click on the blue **Manage Profile** button for one of the Lobbyist Registrant's Clients.
6. The selected Client's **Manage Profile** page opens. See Figure 43.
7. On the Client's **Manage Profile** page, click on the **Relationships** tab. See Figure 75.
8. Click on the blue **Add New Relationship** button.
9. The **Add New Relationship** pop-up box opens. See Figure 76.
10. Use the **Select Official** pulldown menu to select the name of the District government official or staff member with which the Lobbyist Registrant had a "business relationship" or "professional services relationship" during the reporting period. See Figure 77.
11. Use the **Nature of Relationship** pulldown menu to identify the nature of the Lobbyist Registrant's relationship with that District government official. See Figure 78.
12. Enter the start date of the relationship in the **Start Date** box.

Note: Clicking on the gray calendar  icon will cause a calendar pop-up box to appear which you can use to select the applicable date as opposed to manually entering it.
13. Enter the end of the relationship in the **End Date** box.
14. Click on the green SAVE button at the bottom of the pop-up box.
15. The newly added relationship will appear on the **Relationships** tab of the **Manage Profile** page for your Lobbyist Registrant's Client. See Figure 79.

NOTE: Because you are reporting Relationships within the **Registrant Profile** framework of a Lobbyist Registrant, you are reporting Relationships that exist between that Lobbyist Registrant and District officials. You are NOT reporting relationships here that exist between the Client and District Officials. Relationships that exist between one of your Clients and District Officials would be reported within the framework of the Client's Registrant Profile page, as described in Section 7.1.3.2 below.

NOTE: Once you enter a relationship within a Lobbyist Registrant's **Registrant Profile** framework in connection with one of the Lobbyist's Clients, the LRR system deems that relationship to be germane to the Lobbyist Registrant itself, and the system will repopulate that relationship into ALL the Lobbyist Registrant's Activity Reports for the quarterly reporting period, as long as that relationship remains "active."

NOTE: These relationships tend to have an “active” end date because the relationship is ongoing. Once a relationship ends (e.g. the District official’s spouse stops working for the Lobbyist Registrant), you can add an End Date, and the relationship will be removed from the Lobbyist Registrant’s future Activity Reports.



My Registrants / Registrant Profile / Manage Client Profile

Manage Profile

Belmont Confectioners, Inc. - Client

1000 Bethesda Belmont Road Belmont, OH 43718

(740) 484-1111

john@belmontcandy.com

Edit Client Profile

Client's Key Contacts

File Reports

Delete Client's Profile

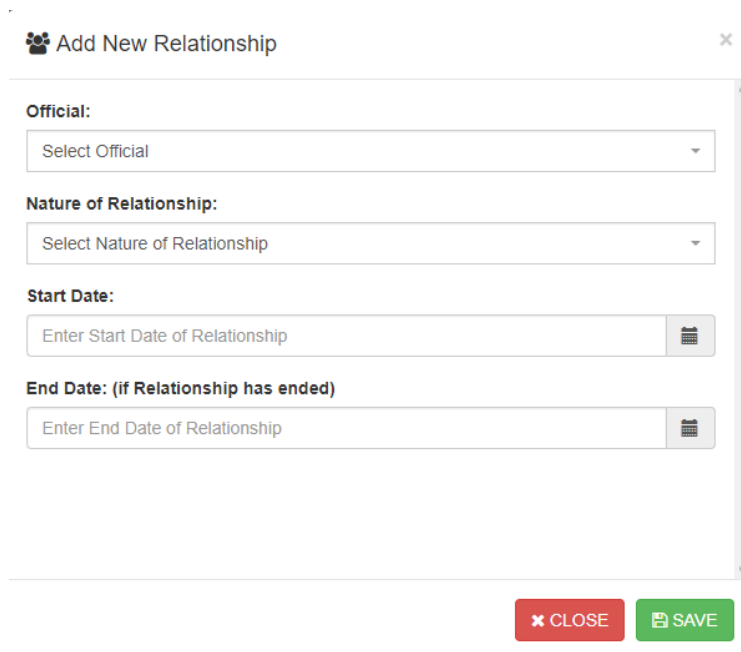
Compensation Communications **Relationships** Contributions & Gifts

Relationships with DC Officials ? **+ Add New Relationship**

Show 10 entries Search: PDF CSV

Official's Name	Official's Agency	Official's Title	Nature	Start Date	End Date	Actions
No data available in table						

Figure 75. Client Registrant Profile – Relationships Tab



Add New Relationship

Official:

Select Official

Nature of Relationship:

Select Nature of Relationship

Start Date:

Enter Start Date of Relationship

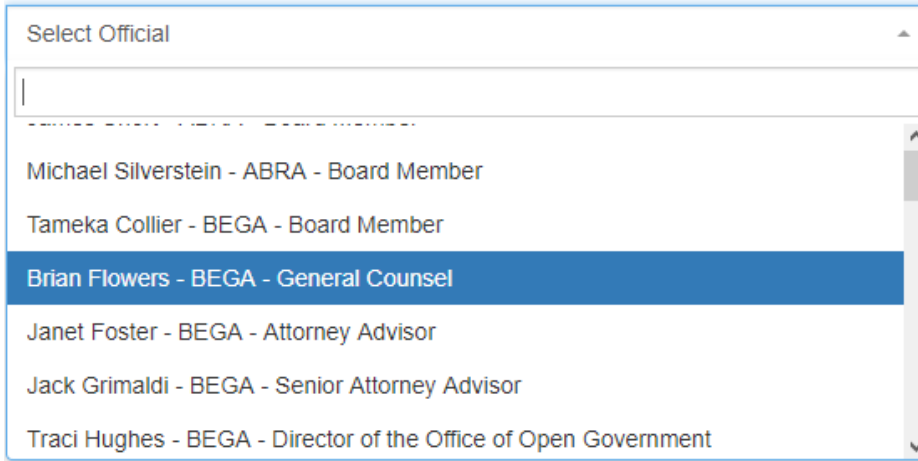
End Date: (if Relationship has ended)

Enter End Date of Relationship

CLOSE SAVE

Figure 76. Add New Relationship Pop-Up Box

Official:

A screenshot of a web form's 'Select Official' pulldown menu. The menu is open, showing a list of names and titles. The first option is 'Brian Flowers - BEGA - General Counsel', which is highlighted with a blue background. Other options include 'Michael Silverstein - ABRA - Board Member', 'Tameka Collier - BEGA - Board Member', 'Janet Foster - BEGA - Attorney Advisor', 'Jack Grimaldi - BEGA - Senior Attorney Advisor', and 'Traci Hughes - BEGA - Director of the Office of Open Government'. The menu has a search bar at the top and a scroll bar on the right.

Select Official

Michael Silverstein - ABRA - Board Member

Tameka Collier - BEGA - Board Member

Brian Flowers - BEGA - General Counsel

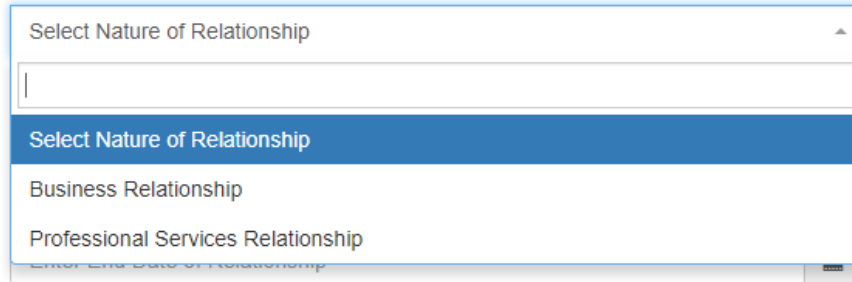
Janet Foster - BEGA - Attorney Advisor

Jack Grimaldi - BEGA - Senior Attorney Advisor

Traci Hughes - BEGA - Director of the Office of Open Government

Figure 77. Select Official Pulldown Menu

Nature of Relationship:

A screenshot of a web form's 'Nature of Relationship' pulldown menu. The menu is open, showing a list of relationship types. The first option is 'Select Nature of Relationship', which is highlighted with a blue background. Other options include 'Business Relationship' and 'Professional Services Relationship'. The menu has a search bar at the top and a scroll bar on the right.

Select Nature of Relationship

Select Nature of Relationship

Business Relationship

Professional Services Relationship

Figure 78. Nature of Relationship Pulldown Menu

My Registrants / Registrant Profile / Manage Client Profile

Manage Profile

Belmont Confectioners, Inc. - Client

1000 Bethesda Belmont Road Belmont, OH 43718

(740) 484-1111

john@belmontcandy.com

Edit Client Profile

Client's Key Contacts

File Reports

Delete Client's Profile

Compensation

Communications

Relationships

Contributions & Gifts

Relationships with DC Officials ?

+ Add New Relationship

Show 10 entries

Search:

PDF CSV

Official's Name	Official's Agency	Official's Title	Nature	Start Date	End Date	Actions
Brian Flowers	BEGA	General Counsel	Business Relationship	2/14/2019	Active	<p>Edit</p> <p>Delete</p>

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 79. Manage Client Profile Page – Relationships Tab – New Relationship Added

7.1.3.2 Using the Relationships Tab for Activity Reports Being Filed by *Client* Registrants

To enter information regarding a *Client* Registrant's Relationships with D.C. government officials, follow this process:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the Client Registrant whose relationships you want to enter into the LRR system.
4. The **Registrant Profile** page for the selected Client opens. See Figure 46.
5. Click on the blue **Manage Profile** button for one of the Client Registrant's Lobbyists.
6. The selected Lobbyist's **Manage Profile** page opens. See Figure 47.
7. On the Lobbyist's **Manage Profile** page, click on the **Relationships Tab**. See Figure 80.
8. Click on the blue **Add New Relationship** button.
9. The **Add New Relationship** pop-up box opens. See Figure 76.

10. Use the **Select Official** pulldown menu to select the name of the District government official or staff member with which the Client Registrant had a “business relationship” or “professional services relationship” during the reporting period. See Figure 77.
11. Use the **Nature of Relationship** pulldown menu to identify the nature of the Client Registrant’s relationship with that District government official. See Figure 78.
12. Enter the start date of the relationship in the **Start Date** box.

Note: Clicking on the gray calendar  icon will cause a calendar pop-up box to appear which you can use to select the applicable date as opposed to manually entering it.

13. Enter the end of the relationship in the **End Date** box.
14. Click on the green SAVE button at the bottom of the pop-up box.
15. The newly added relationship will appear on the **Relationships** tab of the **Manage Profile** page for your Client Registrant’s Lobbyist. See Figure 81.

NOTE: Because you are reporting Relationships within the **Registrant Profile** page of a Client Registrant, you are reporting Relationships that exist between that Client Registrant and District officials. You are NOT reporting relationships here that exist between the Lobbyist and District Officials. Relationships that exist between one of your Lobbyists and District Officials would be reported within the framework of the Lobbyist’s Registrant Profile page, as described in Section 7.1.3.1 above.

NOTE: Once you enter a relationship within a Client Registrant’s **Registrant Profile** page in connection with one of the Client’s Lobbyists, the LRR system deems that relationship to be germane to the Client Registrant itself, and the will repopulate that relationship into ALL the Client Registrant’s Activity Reports for the quarterly reporting period, as long as that relationship remains “active.”

NOTE: These relationships tend to have an “active” end date because the relationship is ongoing. Once a relationship ends (e.g. the District official’s spouse stops working for the Client Registrant), you can add an End Date, and the relationship will be removed from the Client Registrant’s future Activity Reports.

My Registrants / Registrant Profile / Manage Lobbyist Profile

Manage Profile

Fred Flintstone - Individual Lobbyist
 1000 Wilma Lane NW Washington, DC 20012
 (202) 111-3333
 fred@fredflintstone.com

Edit Lobbyist Profile
 Lobbyist's Key Contacts
 File Reports
 Delete Lobbyist's Profile

Compensation Communications **Relationships** Contributions & Gifts

Relationships with DC Officials ? [+ Add New Relationship](#)

Show 10 entries Search: PDF CSV

Official's Name	Official's Agency	Official's Title	Nature	Start Date	End Date	Actions
-----------------	-------------------	------------------	--------	------------	----------	---------

Figure 80. Lobbyist Registrant Profile – Relationships Tab

My Registrants / Registrant Profile / Manage Lobbyist Profile

Manage Profile

Fred Flintstone - Individual Lobbyist
 1000 Wilma Lane NW Washington, DC 20012
 (202) 111-3333
 fred@fredflintstone.com

Edit Lobbyist Profile
 Lobbyist's Key Contacts
 File Reports
 Delete Lobbyist's Profile

Compensation Communications **Relationships** Contributions & Gifts

Relationships with DC Officials ? [+ Add New Relationship](#)

Show 10 entries Search: PDF CSV

Official's Name	Official's Agency	Official's Title	Nature	Start Date	End Date	Actions
Brian Flowers	BEGA	General Counsel	Business Relationship	2/14/2019	Active	Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

Figure 81. Manage Lobbyist Profile Page – Relationships Tab – New Relationship Added

7.1.4 Using the Contributions & Gifts Tab


Both Lobbyist Registrants and Client Registrants are required to report any political expenditure, loan, gift, honorarium, or contribution of \$50 or more made by the Registrant or anyone acting on behalf of the Registrant to benefit an official in the executive or legislative branches, a member of any such official's staff or household, or a campaign or testimonial committee established for such an official's benefit. Pursuant to D.C. Official Code §1-1162.30(3), Registrants must itemize these expenditures by date, beneficiary amount, and circumstances of the transaction, including the aggregate of all individual expenditures that are less than \$50.

You will use the **Contributions & Gifts** tab within the framework of the Registrants' respective **Manage Profile** pages to enter information into the LRR system regarding the contributions and gifts, if any, that your Registrants made to District government officials, political campaigns, etc.


To enter information regarding contributions and gifts made by a Registrant's to D.C. government officials, political campaigns, etc. follow this process:

1. Click on the **My Registrants** link at the top of any page in the LRR system. See Figure 13.
2. The **My Registrants** page opens.
3. At the bottom of the **My Registrants** page, click on the name of the Registrant whose contributions and gifts you need to enter into the LRR system.
4. The **Registrant Profile** page for the selected Registrant opens. See Figure 42.
5. Click on the blue **Manage Profile** button for one of the Registrant's Clients (or one of the Registrant's Lobbyists, if working within a Client's **Registrant Profile**).
6. The selected Client's **Manage Profile** page opens. See Figure 43.
7. On the Client's **Manage Profile** page, click on the **Contributions & Gifts** tab. See Figure 82.
8. Click on the blue **Add New Contribution** button.
9. The **Add New Contribution** pop-up box opens. See Figure 83.
10. Use the **Type of Contribution** pulldown menu to select the type of contribution or gift the Registrant made during the reporting period. See Figure 84.
11. Use the **On Behalf Of** pulldown menu to indicate whether the Lobbyist made the contribution or gift on its own behalf, or on behalf of the Client. See Figure 85.
12. Use the **Beneficiary Name** pulldown menu to identify the beneficiary of the Registrant's contribution or gift. See Figure 86.

Note: If the recipient's name is not included as an option in the pulldown menu, click on the blue + **Add New** link and the **Add New Beneficiary** dialog box appears. See Figure 87. Enter the new beneficiary's name in the **Add New Beneficiary** dialog box,

click the green Checkmark  box to add the new beneficiary's name to the pulldown menu, then select the new beneficiary's name from the updated pulldown menu options.

Note: If the name of the beneficiary of your Registrant's contribution appears to be inaccurate or misspelled in the **Beneficiary Name** pulldown menu, select that name, click on the blue **Edit Selected** link and the **Edit Beneficiary Name** dialog box appears. See

Figure 88. Edit the beneficiary name as needed, click the green Checkmark  box to add the edited beneficiary's name to the pulldown menu, then select the edited beneficiary's name from the updated pulldown menu options.

13. Enter the date of the contribution in the **Date of Contribution** box.

Note: Clicking on the gray calendar  icon will cause a calendar pop-up box to appear which you can use to select the applicable date as opposed to manually entering it.

14. Enter the amount of the contribution in the **Amount of Contribution** box.

15. Use the **Purpose of Contribution** pulldown menu to select the purpose of this contribution or gift from the Registrant. See Figure 89.

16. Click on the green SAVE button at the bottom of the pop-up box.

17. The newly added contribution or gift will appear on the **Contributions & Gifts** tab of the **Manage Profile** page for your Registrant's Client (or one of the Registrant's Lobbyists, if working within a Client's **Registrant Profile**). See Figure 90.

NOTE: Once you enter a contribution or gift within a Lobbyist's **Registrant Profile** page as being made on behalf of the Lobbyist, in connection with one of the Lobbyist's Clients, the LRR system deems that contribution or gift to be germane to the Lobbyist Registrant itself, and the system will repopulate that contribution or gift into ALL the Lobbyist Registrant's Activity Reports for the quarterly reporting period.

My Registrants / Registrant Profile / Manage Client Profile

Manage Profile

Belmont Confectioners, Inc. - Client

1000 Bethesda Belmont Road Belmont, OH 43718

(740) 484-1111

john@belmontcandy.com

Edit Client Profile

Client's Key Contacts

File Reports

Delete Client's Profile

Compensation Communications Relationships **Contributions & Gifts**

Contributions & Gifts to (DC Officials and DC Campaign Committees) ? [+ Add New Contribution](#)

Show 10 entries Search: PDF CSV

On Behalf Of	Type Of Contribution	Beneficiary	Date	Amount	Actions
No data available in table					

Figure 82. Contributions & Gifts Tab

\$ Add New Contribution

Each political expenditure, loan, gift, honorarium, or contribution of \$50 or more made by the Registrant or anyone acting on behalf of the Registrant to benefit an official in the legislative or executive branch, a member of his or her staff or household, or a campaign or testimonial committee established for the benefit of the official, shall be itemized by date, beneficiary, amount, and circumstances of the transaction, including the aggregate of all expenditures that are less than \$501.

Type of Contribution:
Select Type Of Contribution

On Behalf of:
Select

Beneficiary Name: [Edit Selected](#) [+ Add new](#)
Select Beneficiary

Date of Contribution:
Enter Date Of Contribution

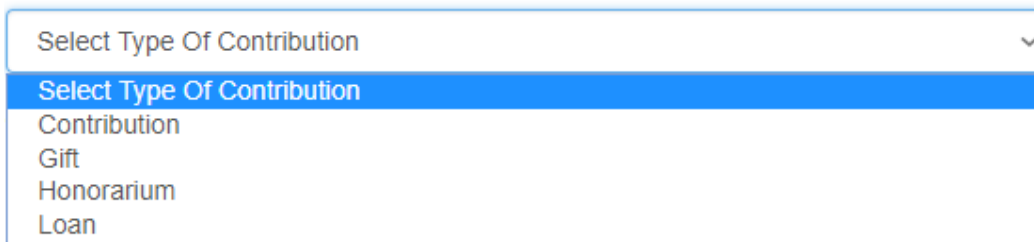
Amount of Contribution:
\$ Amount of Contribution

Purpose of Contribution:
Select Purpose of Contribution

[CLOSE](#) [SAVE](#)

Figure 83. Add New Contribution Pop-Up Box

Type of Contribution:



Select Type Of Contribution

Select Type Of Contribution

Contribution

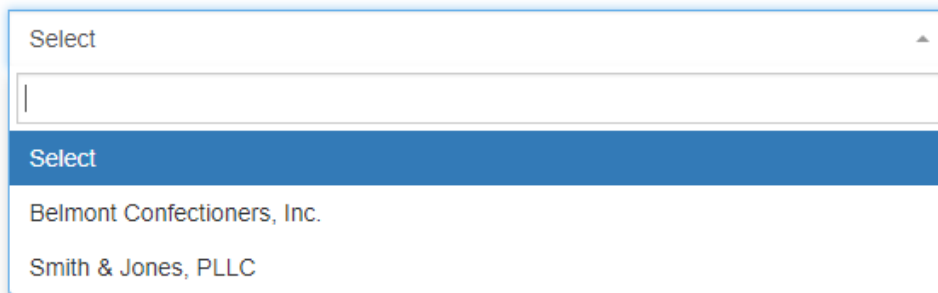
Gift

Honorarium

Loan

Figure 84. Type of Contribution Pulldown Menu

On Behalf of:



Select

Select

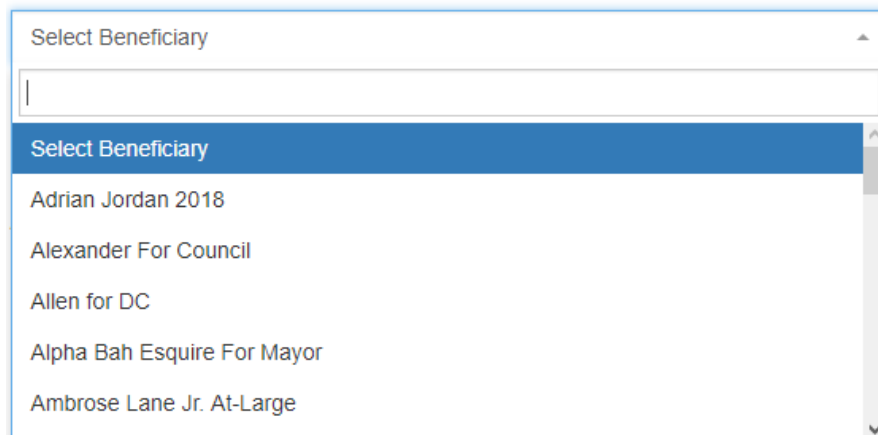
Belmont Confectioners, Inc.

Smith & Jones, PLLC

Figure 85. "On Behalf Of" Pulldown Menu

Beneficiary Name:

[Edit Selected](#) [+ Add new](#)



Select Beneficiary

Select Beneficiary

Adrian Jordan 2018

Alexander For Council

Allen for DC

Alpha Bah Esquire For Mayor

Ambrose Lane Jr. At-Large

Figure 86. Beneficiary Name Pulldown Menu

Beneficiary Name: [Edit Selected](#) [+ Add new](#)

Select Beneficiary

Add new beneficiary name:

Committee to Elect Serena Williams ✓ ✗

Figure 87. Add New Beneficiary Name Box

Beneficiary Name: [Edit Selected](#) [+ Add new](#)

Committee to Elect Serena Williams

Edit beneficiary name:

Committee to Elect Serena Williams ✓ ✗

Figure 88. Edit Beneficiary Name Box

Purpose of Contribution:

Select Purpose of Contribution

Select Purpose of Contribution

- Board Reception & Dinner Expenditure
- Constituent Services Fund Contribution
- Constituent Services Inkind Contribution
- Other Contribution
- Political Campaign Bundled Contribution

Figure 89. Purpose of Contribution Pulldown Menu

My Registrants / Registrant Profile / Manage Client Profile

Manage Profile

Belmont Confectioners, Inc. - Client

1000 Bethesda Belmont Road Belmont, OH 43718

(740) 484-1111

john@belmontcandy.com

Edit Client Profile

Client's Key Contacts

File Reports

Delete Client's Profile

Compensation Communications Relationships **Contributions & Gifts**

Contributions & Gifts to (DC Officials and DC Campaign Committees) ? [+ Add New Contribution](#)

Show 10 entries Search: PDF CSV

On Behalf Of	Type Of Contribution	Beneficiary	Date	Amount	Actions
Smith & Jones, PLLC	Contribution	Committee to Elect Serena Williams	3/14/2019	\$1,000.00	Edit Delete Print

Showing 1 to 1 of 1 entries **Total Contributions: \$1,000.00** [Previous](#) [1](#) [Next](#)

Figure 90. Contributions & Tab – New Contribution Added

8. Submitting Reports

The core purpose of the LRR system is to allow Lobbyists and their Clients to comply with their obligations to register with BEGA and to file quarterly activity reports. This section explains how they can use the LRR system to achieve compliance by filing Registration Reports once per year, and by filing Activity Reports on a quarterly basis.

One starting point to file Registration Reports or Activity Reports for both Lobbyist Registrants and Client Registrants is your own **Registrant Profile** page, where your affiliated Clients (or Lobbyists, if you are a Client Registrant) are listed. To begin the process, you simply need to click the light blue **File Reports** button that is listed at the right end of each Client's (or Lobbyist's) row. See Figures 91 and 92.

My Registrants / Registrant Profile

Registrant Profile

Napoleon Dynamite Neighborhood Association - Lobbying Entity
 4577 Napoleon Way NE Washington, DC 20019
 (202) 112-3456
 ndna20019@gmail.com

Edit Registrant Profile
 Registrant Key Contacts
 Users & Roles
 Delete Registrant

Clients Payments

Clients ? + Add New Client (Using my profile info) + Add New Client

Show 10 entries Search: PDF CSV Filter by Status

Name	Nature of Business	Address	Date Created	Status	Actions
Connection Express, LLC	Bike Rental/Share	1345 Connection Avenue NE Suite 100 Washington DC 20019	3/22/2019	Active	Manage Profile File Reports
Hocus Pocus Enterprises, LLC	Entertainment	7854 Magic Lane NW Suite 500 Washington DC 20012	3/20/2019	Active	Manage Profile File Reports
Napoleon Dynamite Neighborhood Association	Neighborhood Association	4577 Napoleon Way NE Washington DC 20019	2/2/2019	Active	Manage Profile File Reports

Showing 1 to 3 of 3 entries Previous 1 Next

Figure 91. Lobbyist Registrant Profile Page – File Reports Button for Clients

My Registrants / Registrant Profile

Registrant Profile

Barney Rubble Enterprises - Client
 4000 Bedrock Lane NW Washington, DC 20012
 (202) 111-2222
 barney@barney.com

Edit Registrant Profile
 Registrant Key Contacts
 Users & Roles
 Delete Registrant

Lobbyists Payments

Lobbyists ? + Add New Lobbyist

Show 10 entries Search: PDF CSV Filter by Status

Name	Nature of Business	Address	Date Created	Status	Actions
Fred Flintstone	Lobbyist/Attorney	1000 Wilma Lane NW Washington DC 20012	1/31/2019	Active	Manage Profile File Reports

Showing 1 to 1 of 1 entries Previous 1 Next

Figure 92. Client Registrant Profile Page – File Reports Button for Lobbyists

The second place you can initiate the report filing process is the **Manage Profile** page for each of your Clients – or for Client Registrants, each of your Lobbyists. To begin the process, you simply need to click the light blue **File Reports** button. See Figures 93 and 94.

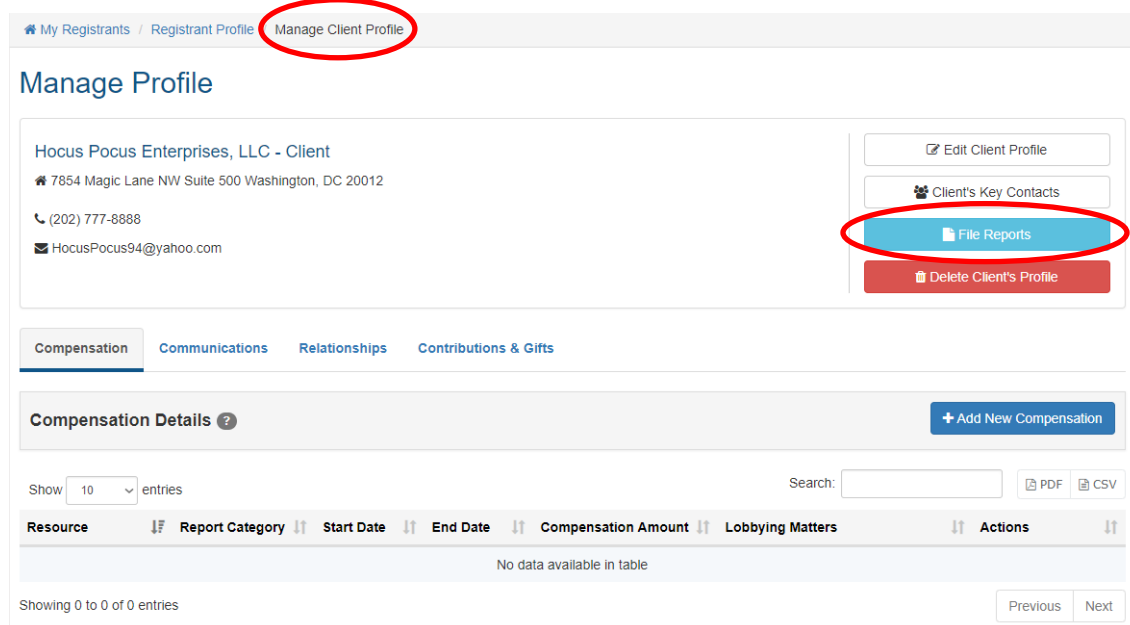


Figure 93. Manage Client Profile Page – File Reports Button

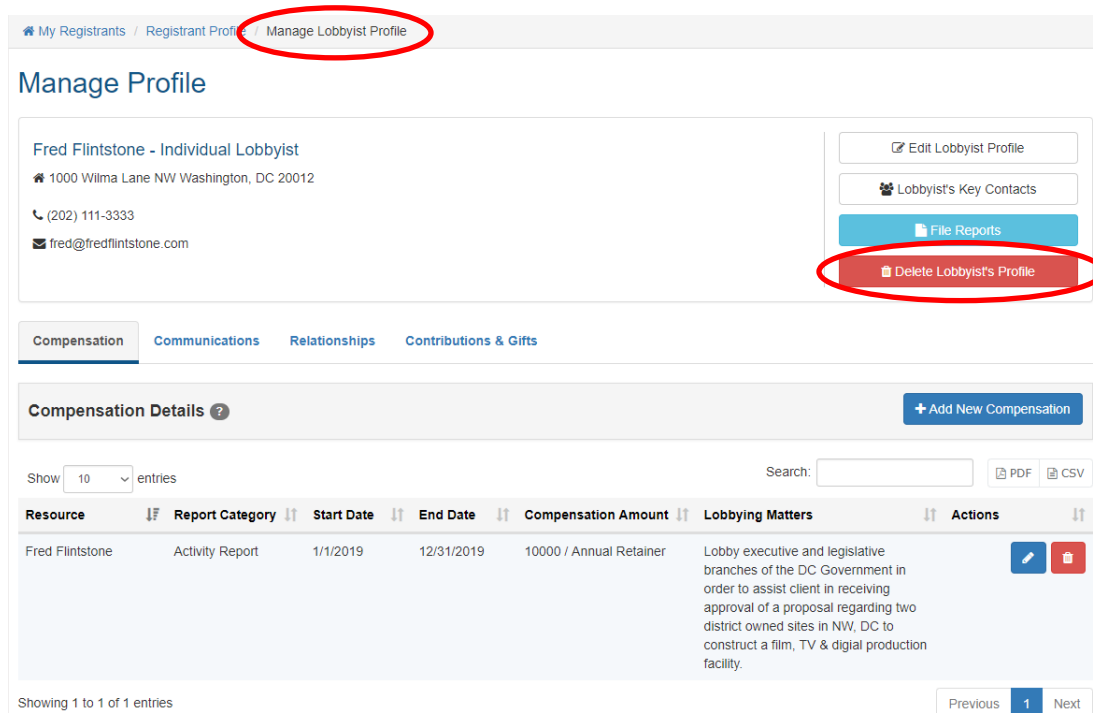


Figure 94. Manage Lobbyist Profile Page – File Reports Button

8.1 How to Submit Registration Reports

Regardless of where you choose to initiate the report filing process (see preceding section), the next steps of the process are identical.

To submit a Registration Report:

1. Click on the light blue **File Reports** button.
2. The **Reports** page opens. See Figure 95.
3. Click on the blue **Add New Registration Report** button.
4. The **Create Report** page opens. See Figure 96.
5. Unless the registrant has been recognized by the Internal Revenue Service (IRS) as a 501(c)(3) organization, click on the **Registrant is not 501(c)(3)** radio button under **IRS Tax Status**.
6. Use the **Report Type** pulldown menu to select the type of report you are filing (New, Renew, or Termination).
7. Use the **Report Period** pulldown menu to select the applicable registration year.

Note: Once you make your pulldown menu selections, the system will look to see if you have previously entered a Compensation Record that applies to both the kind of Report you are attempting to create (e.g. Registration Report vs. Activity Report) and the Report Period you have selected. If so, that Compensation Record will appear beneath the Compensation Details heading. If not, you will need to back and create a Compensation Record for this registration period.

Report Type: Renew

Report period: Start 1/1/2019 - End 12/31/2019 - 2019 Registration Report

Report IRS Tax Status:

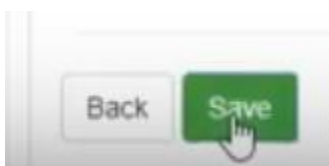
☒ Registrant is not 501(c)(3) - \$250.00

☐ 501(c)(3) Non-Profit Registrant - \$50.00

Compensation Details ?

Resource Name	Report Category	Start Date	End Date	Compensation Amount	Lobbying Matters
Bob Tester	Registration Report	1/1/2019	12/31/2019	0 / Monthly Retainer	Matters related to Technology

Once you click the green Save button at the bottom of this page, a draft Report will be added for this Client and the Review Report page will open:



8. If needed, enter any relevant additional information in the **Additional Information** box.
9. Click the green **Save** button at the bottom of the page.

Note: The system is programmed to only accept a new report if you have completed all the required fields of information (e.g. Compensation Record, Client's Key Contact information, etc.) If you attempt to submit a new report without completing all the required fields of information, the system will reject the submission and display a checklist of those required fields, **highlighting with a red "X" all the fields that you still need to complete.**

If the system rejects your attempted submission, you must go back and enter information for all fields that the checklist indicated were incomplete. As noted above several times, please remember that IT IS NOT GOOD ENOUGH TO CLICK THE BLUE BUTTONS TO SAVE INDIVIDUAL FIELDS OF INFORMATION (e.g. an email address, phone number or physical address). **YOU MUST ALSO CLICK THE GREEN BUTTON AT THE BOTTOM OF THE PAGE TO FINALIZE THE PROCESS!**

10. The Review Report page opens. See Figure 97.

Note: Although the Registration Report has now been created, it will not be officially filed with BEGA until you pay the required Registration Fee.

11. At this point, you have the option to either A) go back and edit the Report, B) Certify the Report and Submit it now, or C) Certify the accuracy of the Report but delay submitting the Report until later (e.g. as part of a larger block of Registration Reports for which you are using one check or credit card transaction to pay all the applicable registration fees. See Figure 98.
12. If you click on either of the **Certify** buttons, you will return to the **Reports** page for that Client, where your newly created Report will appear at the bottom of the page. However, if you clicked on the **Certify and Submit Later** button, that Report's status will still be listed as "Not Submitted" until the registration fee is paid. See Figure 99.
13. There are also several buttons at the bottom right of the page that allow you to perform various functions related to the Report, including a green button to generate a PDF version of the Report and a red button with a trash can icon that allows you to delete any Report that you have not yet submitted. If you click on the blue Details button that is circled above, you will return to the Review Report page where you have the option to A) go back and edit the Report, B) Certify the Report and Submit it now, or C) Certify the accuracy of the Report but delay submitting the Report until later.
14. If you click on the blue **Certify and Submit Now** button on the **Review Report** page, the **Certification** pop-up box appears. Use the pulldown menu to select the name of the person who is certifying the accuracy of the report, click the certification check-box to confirm under oath that the information you have entered on the Report is accurate, then click the green **Certify and Submit** button to formally submit the report to BEGA.

15. **Note:** Once you select a certifier, that person's name replaces the (Selected Certifier) placeholder in the certification declaration. See Figure 100.
16. After you submit the Report to BEGA, the Client's **Profile Page** is updated to reflect that the Report has been submitted, but payment of the registration fees remains pending. You then have the option to either click the green **Pay Now** button or the blue **Pay Later** button at the bottom of the page. See Figure 101.
17. If you click the blue **Pay Later** button, you will return to that Client's Reports page, which will now reflect that the current status of your Registration Report is **Submitted and not paid**. See Figure 102.
18. Selecting the **Pay Later** option after you submit the Registration Report will also result in changes on the Lobbying Entity's **Profile** page. If you click on the **Payments** tab, you will see that the Lobbying Entity's Payments list has been updated to reflect that the \$250.00 registration fee for that client remains due and payable. The system will also update the total amount owed by the Lobbying Entity for all outstanding fees. You can also make a payment from this page by clicking on the blue **Make a Payment** button. See Figure 103.
19. If you click on the blue "Make a Payment" button, the system will give you the option to either pay all the fees that are currently outstanding for the Lobbying Entity, or to only pay the fees for whatever individual Reports you have selected by clicking the applicable checkboxes. See Figure 104.
20. Once you decide whether you want to pay your entire outstanding balance with one payment, or only pay for certain selected items, the **Payment Checkout** page will open. See Figure 105.
21. If you click on the orange **Proceed Checkout** button, a dialog box opens for your credit card information. See Figure 106. Enter your card information and press the green Submit button to send the payment to BEGA.

Reports

LMP Corp. - Client
 200 I Street SE 5th floor Washington, DC 20003
 (222) 222-2222
 mark.mcdermott@dc.gov

☐ Edit Client Profile
 Client's Key Contacts
 Manage Client Profile
 Delete Client's Profile

Registration Reports Activity Reports Previous System Reports

Registration Reports ? **+ Add New Registration Report**

Figure 95. Reports Page – Registration Reports Tab

My Registrants / Registrant Profile / Reports / Create report

Create report

i Registration report

XYZ Lobbying Group - Lobbying Entity
 200 I Street SE 5th floor Washington, DC 20003
 (222) 727-5959
 mark.mcdermott@dc.gov

Client: LMP Corp. - Client
 200 I Street SE 5th floor Washington, DC 20003
 (222) 222-2222
 mark.mcdermott@dc.gov

Nature of Client's Business:
 Educational Services

Client's Key Contact ?
 Chris Chen

Client IRS Tax Status:
 Registrant is not 501(c)(3)

Report Type:
 Select a report type

Report period:
 Select a report period

Report IRS Tax Status:
☒ Registrant is not 501(c)(3) - \$250.00
☐ 501(c)(3) Non-Profit Registrant - \$50.00

Figure 96. Create Report Page

My Registrants / Registrant Profile / Reports / Review report

Review report

Report added successfully!

Report details

Your client will not be successfully added to your registrant until you have paid the registration fee.

Napoleon Dynamite Neighborhood Association - Lobbying Entity

4577 Napoleon Way NE Washington, DC 20019

(202) 112-3456

ndna20019@gmail.com

Client: Connection Express, LLC - Client

1345 Connection Avenue NE Suite 100 Washington, DC 20019

(202) 444-3333

connectionexpress@gmail.com

Nature of Client's Business:
Bike Rental/Share

Client's Key Contact
Lance Armstrong

Client IRS Tax Status:
Registrant is not 501(c)(3)

Report Type:
New

Report period:
2019 - 2019 Registration Report

Compensation Details

Resource Name	Report Category	Start Date	End Date	Compensation Amount	Lobbying Matters
Connection Express, LLC	Registration Report	3/1/2019		/ Amount is unknown	Lobbying on bike share pilot rules

Figure 97. Review Report Page – Registration Fee Not Paid Notice

Additional Comments:

Registration Cost

Registrant is not 501(c)(3) - \$250.00

Back to Edit Certify and Submit Later Certify and Submit Now

Figure 98. Review Report Page – Certify and Submit Options

Reports

LMP Corp. - Client
 200 I Street SE 5th floor Washington, DC 20003
 (222) 222-2222
 mark.mcdermott@dc.gov

Edit Client Profile
 Client's Key Contacts
 Manage Client Profile
 Delete Client's Profile

Registration Reports Activity Reports Previous System Reports

Registration Reports ?

Show 10 entries Search: PDF CSV

Reporting Year	IRS Tax Status	Status	Actions
2019 - 2019 Registration Report	Registrant is not 501(c)(3)	Not Submitted	

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 99. Reports Page – Not Submitted Status

Certify and submit report

Certifier:
 Select a certifier
 Select a certifier
 Bob Tester

Please select all statements checkboxes
☐ I, **(Selected Certifier)**, certify and declare under oath that all of my statements on this form are to the best of my knowledge and belief, true, correct, and complete. I understand that the making of a false statement on this form or materials submitted with this form is punishable by criminal penalties pursuant to D.C. Official Code § 22-2405 et seq. (2001).

X CLOSE Certify and Submit

Certify and submit report

Certifier:
 Bob Tester
 (Key contact marked as certifier on Registrant profile)

Please select all statements checkboxes
☐ I, **Bob Tester**, certify and declare under oath that all of my statements on this form are to the best of my knowledge and belief, true, correct, and complete. I understand that the making of a false statement on this form or materials submitted with this form is punishable by criminal penalties pursuant to D.C. Official Code § 22-2405 et seq. (2001).

X CLOSE Certify and Submit

Figure 100. Certification Pop-Up Box

Payments

Operation	Status	Quantity	Amount	Total Amount	Actions
Registration report	Payment Pending	1	\$250.00	\$250.00	

Total amount: \$250.00

Report certified and submitted

Certified by: Bob Tester

Certified date: 1/18/2019 10:41:10 AM

As part of the process, your report will only be valid after fees or penalties fees are paid, choose one of options that better suit your schedule.

[Pay Later](#)
[Pay Now](#)

Figure 101. Payment Options

Reports

LMP Corp. - Client

200 I Street SE 5th floor Washington, DC 20003

(222) 222-2222

mark.mcdermott@dc.gov

[Edit Client Profile](#)
[Client's Key Contacts](#)
[Manage Client Profile](#)
[Delete Client's Profile](#)

[Registration Reports](#)
[Activity Reports](#)
[Previous System Reports](#)

Registration Reports

[+ Add New Registration Report](#)

Show entries

Search:

[PDF](#) [CSV](#)

Reporting Year	IRS Tax Status	Status	Actions
2019 - 2019 Registration Report	Registrant is not 501(c)(3)	Submitted and not paid	

Showing 1 to 1 of 1 entries

Previous **1** Next

Figure 102. Reports Page – Submitted and Not Paid

My Registrants / Registrant Profile

Registrant Profile

XYZ Lobbying Group - Lobbying Entity
 200 I Street SE 5th floor Washington, DC 20003
 (222) 727-5959
 mark.mcdermott@dc.gov

[Edit Registrant Profile](#)
[Registrant Key Contacts](#)
[Users & Roles](#)
[Delete Registrant](#)

Clients **Payments**

Payments [\\$ Make a Payment](#) [View All Payments](#)

Show 10 entries Search: PDF CSV

Company	Reporting Year	Operation	Total Amount	Date Created
<input checked="" type="checkbox"/> LMP Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/18/2019
<input type="checkbox"/> DEF Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/17/2019

Showing 1 to 2 of 2 entries **Total due: \$500.00** Previous 1 Next

Figure 103. Registrant Profile Page – Payments Tab

My Registrants / Registrant Profile

Registrant Profile

XYZ Lobbying Group - Lobbying Entity
 200 I Street SE 5th floor Washington, DC 20003
 (222) 727-5959
 mark.mcdermott@dc.gov

[Edit Registrant Profile](#)
[Registrant Key Contacts](#)
[Users & Roles](#)
[Delete Registrant](#)

Clients **Payments**

Payments [Pay Selected](#) [Pay All](#) [View All Payments](#)

Show 10 entries Search: PDF CSV

Company	Reporting Year	Operation	Total Amount	Date Created
<input checked="" type="checkbox"/> LMP Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/18/2019
<input type="checkbox"/> DEF Corp.	2019 - 2019 Registration Report	Registration report	250.00	1/17/2019

Showing 1 to 2 of 2 entries **Total due: \$500.00** Previous 1 Next

Figure 104. Registrant Profile Page – Make A Payment Pulldown Menu

My Registrants / Registrant Profile / Payment checkout

Payment checkout

Pending Payments

Report	Operation	Quantity	Amount	Total Amount
2019 - 2019 Registration Report	Registration report	1	\$250.00	\$250.00

Total amount to pay: \$250.00

[Pay later](#)
[Proceed checkout](#)

Figure 105. Payment Checkout Page

Payment checkout

Payment Information

Name on the card:

Name on the card

Card number:

markd.mcdermott@

Card Type:

Select a card type

Expiration Date

Month: 1 Year: 2019

Card Security Code (CVV):

Total amount to pay: \$250.00

[Pay later](#)
[Submit](#)

Figure 106. Payment Checkout Page – Credit Card Dialog Box

As discussed above, if your organization is a Lobbying Entity that lobbies for itself via in-house lobbyists, you only create one New Registrant as a New Lobbyist (not a client), then indicate on the **Edit Registrant** page that the Entity is representing itself as a client, and the system will then

duplicate the Lobbying entity's contact information and re-populate it as the contact information for the Client.

However, things get a little more complicated when a Lobbying Entity that lobbies for itself via in-lobbyists ALSO pays an outside firm to conduct Lobbying Activities on its behalf. In that situation, the outside firm will also need to register as a Lobbying Entity with BEGA, pay a separate \$250 registration fee, then list your organization at its client. But to be clear, any organization that uses in-house staff to perform lobbying services on its own behalf only has to pay one \$250 registration fee in such a situation. BEGA does not require such an organization to also pay a *second* \$250 registration fee when it is also a client for another Lobbying Entity.

8.2 How to Submit Activity Reports

Regardless of where you choose to initiate the report filing process (see Section 8 above), the next steps of the process are identical.

To submit an Activity Report:

1. Make sure you have already created a Compensation Record for this Activity Report. If not, go back and create one following the process outlined in Section 7.1.1 above.

Note: It is important to remember that if you want to submit a quarterly Lobbyist Activity Report (LAR), at least one of the dates in the Compensation Record related to that LAR **must** occur during that quarterly reporting period or the system will reject it. However, BEGA anticipates that most Lobbying Entities will use the Start and End dates for the applicable quarterly reporting period when creating Compensation Records for Activity Reports.

2. Click on the light blue **File Reports** button.
3. The **Reports** page opens. See Figure 107.
4. Click on **Activity Reports** tab, then click on the blue **Add New Activity Report** button.

Note: You cannot create an Activity Report for a quarterly reporting period unless you have already created a Registration Report for that calendar year. See Figure 108.

Note: The system is programmed to only accept a new report if you have completed all the required fields of information (e.g. Compensation Record, Client's Key Contact information, etc.) If you attempt to submit a new report without completing all the required fields of information, the system will reject the submission and display a checklist of those required fields, **highlighting with a red "X" all the fields that you still need to complete.**

If the system rejects your attempted submission, you must go back and enter information for all fields that the checklist indicated were incomplete. As noted above several times,

please remember that IT IS NOT GOOD ENOUGH TO CLICK THE BLUE BUTTONS TO SAVE INDIVIDUAL FIELDS OF INFORMATION (e.g. an email address, phone number or physical address). **YOU MUST ALSO CLICK THE GREEN BUTTON AT THE BOTTOM OF THE PAGE TO FINALIZE THE PROCESS!**

5. The **Create Report** page opens, prepopulated with the information for the Lobbying Registrant and the Client from their respective profiles. See Figure 109.
6. Use the **Report Period** pulldown menu to select the applicable quarterly reporting period for this Activity Report. Once you select a quarterly reporting period, all the information you entered for this particular Lobbyist/Client combination will be pulled from the system and appear in the top section of the draft activity report. See Figure 110.
7. Review the information listed in the **Compensation Details** section of the draft activity report. If accurate, enter that compensation information in the appropriate fields in Schedule A (Compensation paid by registrant to the lobbyist/lobbyist entity for lobbying). See Figure 111.

Note: Only the amounts entered in the two fields listed under the heading **Total Paid to all Lobbyist/Lobbying Entities** will be captured and populated into Schedule B, so be particularly attentive to the accuracy of those two fields.
8. Enter the amounts the Lobbyist expended during the quarterly reporting period in the appropriate boxes for each of the expenditure items listed in Schedule A-1. See Figure 111.
9. The information that appears in Schedule A2 (Contributions made by Lobbying Entity on behalf of Client) is populated by data you have entered elsewhere in the system. See Figure 112. Please review and confirm its accuracy. If this information is not accurate, please go back and correct it.
10. The information that appears in Schedule B (Summary) of the draft activity report is populated by data you have entered elsewhere in the system. See Figure 112. Please review and confirm its accuracy. If this information is not accurate, please go back and correct it.
11. The information that appears in Schedule C (Other Contributions made by Registrant Entity) is populated by data you have entered elsewhere in the system. See Figure 112. Please review and confirm its accuracy. If this information is not accurate, please go back and correct it.
12. If you have any additional comments to provide BEGA regarding any of the information contained in this draft activity report, please enter it in the **Additional Comments** box, then click the green “Save” button at the bottom of this page.
13. The **Review Report** page opens. See Figure 113. If you notice any inaccuracies in the draft activity report, click on the white **Back to Edit** button to correct those inaccuracies.
14. If the draft activity report appears complete and accurate, you have two options: A) Certify the Report and Submit it now, or C) Certify the accuracy of the Report but delay submitting the Report until later. See Figure 98.

15. If you click on either of the **Certify** buttons, you will return to the **Reports** page for that Client, where your newly created Report will appear at the bottom of the page. However, if you clicked on the **Certify and Submit Later** button, that Report's status will still be listed as "Not Submitted" until you actually submit it. See Figure 114.
16. There are also several buttons at the bottom right of the page that allow you to perform various functions related to the Report, including a green button to generate a PDF version of the Report and a red button with a trash can icon that allows you to delete any Report that you have not yet submitted. If you click on the blue Details button that is circled above, you will return to the Review Report page where you have the option to A) go back and edit the Report, B) Certify the Report and Submit it now, or C) Certify the accuracy of the Report but delay submitting the Report until later.
17. If you click on the blue **Certify and Submit Now** button on the **Review Report** page, the **Certification** pop-up box appears. Use the pulldown menu to select the name of the person who is certifying the accuracy of the report, click the certification check-box to confirm under oath that the information you have entered on the Report is accurate, then click the green **Certify and Submit** button to formally submit the report to BEGA. See Figure 100.
18. After you submit the Activity Report to BEGA, the Client's Profile Page is updated to reflect that the Report has been submitted. See Figure 115.

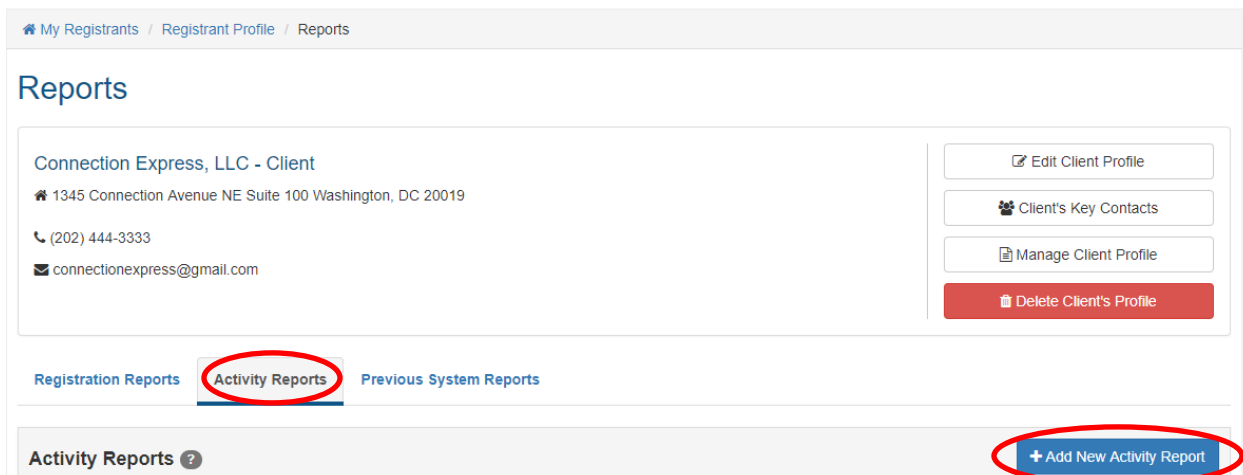


Figure 107. Reports Page – Activity Reports Tab

Check List

X

To add a new Activity Report, you must have submitted a Registration Report for the current reporting year. Please submit a Registration Report for the current reporting year before trying to add a new Activity Report.

✓ - Previous Registration Report filed for current reporting year

✗ - Activity Report Compensation Record

✓ - Client Key Contacts - at least one Key Contact selected as Primary POC

CLOSE

Figure 108. Create Activity Report Check List Pop-Up Window

Create report

i Activity Report

XYZ Lobbying Group - Lobbying Entity

200 I Street SE 5th floor Washington, DC 20003

(222) 727-5959

mark.mcdermott@dc.gov

Client: LMP Corp. - Client

200 I Street SE 5th floor Washington, DC 20003

(222) 222-2222

mark.mcdermott@dc.gov

Nature of Client's Business:

Educational Services

Client's Key Contact ?

Chris Client

Client IRS Tax Status:

Registrant is not 501(c)(3)

Report period:

Select a report period

Select a report period

Start: 1/1/2017 - End: 12/31/2017 - 2017 Activity Report

Start: 1/1/2018 - End: 6/30/2018 - 2018 July Activity Report

Start: 7/1/2018 - End: 12/31/2018 - 2019 Jan Activity Report

Start: 1/1/2019 - End: 3/31/2019 - 2019 April Activity Report

End Date

Compensation Amount

Lobbying Matters

Figure 109. Create Report Page – Draft Activity Report

Create report

Activity Report

XYZ Lobbying Group - Lobbying Entity

200 I Street SE 5th floor Washington, DC 20003

(222) 727-5959

mark.mcdermott@dc.gov

Client: LMP Corp. - Client

200 I Street SE 5th floor Washington, DC 20003

(222) 222-2222

mark.mcdermott@dc.gov

Nature of Client's Business:

Educational Services

Client's Key Contact

Chris Client

Client IRS Tax Status:

Registrant is not 501(c)(3)

Report period:

Start: 7/1/2018 - End: 12/31/2018 - 2019 Jan Activity Report

Compensation Details

Resource Name	Report Category	Start Date	End Date	Compensation Amount	Lobbying Matters
Bob Tester	Activity Report	7/1/2018	12/31/2018	1000 / Monthly Retainer	Matters related to education and technology
Mary Tester	Activity Report	10/1/2018	11/30/2018	3000 / Monthly Salary	Matters related to education and technology

Communications

Name	Title	Type	Date	Purpose
Brian Flowers	General Counsel	Email	12/4/2018	To discuss upcoming legislation

Relationships

Name	Title	Nature
Brian Flowers	General Counsel	Business Relationship

Figure 110. Draft Activity Report – Top Section

Schedule A - Compensation paid by registrant to the lobbyist/lobbyist entity for lobbying

Compensation paid:	Total paid this period:	Cumulative annual total paid (submitted):
Compensation:	\$ 0	\$0
Retainer:	\$ 0	\$0
Total Paid to all Lobbyist/Lobbying entities:	Total paid this period:	Cumulative annual total paid (submitted):
Compensation:	\$ 0	\$0
Retainer:	\$ 0	\$0

Schedule A1 - Lobbyist Expenditures

Expenditures	Total paid this period:	Cumulative annual total paid (submitted):
(a) Office Expenses:	\$ 1	\$0
(b) Adv & Publications:	\$ 2	\$0
(c) Personal Sustenance:	\$ 3	\$0
(d) Lodging:	\$ 0	\$0
(e) Travel:	\$ 0	\$0
(f) Other Expenses:	\$ 0	\$0
Total Expenses:	\$5.00	\$0

Figure 111. Draft Activity Report – Schedules A and A-1

Schedule A2 - Contributions made by Lobbying Entity on behalf of Client

On Behalf Of	Beneficiary	Date	Amount	Purpose	Status
No items to report this period!					

Schedule B - Summary

Total compensation paid to the Lobbyist/Lobbying Entity:	\$200.00 (Schedule A)
Total of expenditures made for purposes of lobbying:	\$6.00 (Schedule A1)
Total of other expenditures related to lobbying activities:	\$0.00 (Schedule A2)
Total expenditures:	\$6.00 (Schedule A1 + A2)
Total of other Contributions made by Lobbying Entity:	\$101.00 (Schedule C)

Schedule C – Other Contributions made by Registrant Entity

On Behalf Of	Beneficiary	Date	Amount	Purpose	Status
XYZ Lobbying Group	Bowser For Mayor	12/14/2018	\$100.00	Political Campaign Contribution	Submitted
XYZ Lobbying Group	Bowser For Mayor	12/10/2018	\$1.00	Political Campaign Contribution	Not submitted

Additional Comments:

500 characters left

[Back](#)
[Save](#)

Figure 112. Draft Activity Report – Schedules A2, B and C

My Registrants / Registrant Profile / Reports / Review Activity Report

Review report

Report added successfully!

Activity Report Details

XYZ Lobbying Group - Lobbying Entity
200 I Street SE 5th floor Washington, DC 20003
(222) 727-5959
mark.mcdermott@dc.gov

Client: LMP Corp. - Client
200 I Street SE 5th floor Washington, DC 20003
(222) 222-2222
mark.mcdermott@dc.gov

Nature of Client's Business:
Educational Services
Client's Key Contact
Chris Client
Client IRS Tax Status:
Registrant is not 501(c)(3)

Report period:
7/2018 - 2019 Jan Activity Report

Compensation Details

Resource Name	Report Category	Start Date	End Date	Compensation Amount	Lobbying Matters
Bob Tester	Activity Report	7/1/2018	12/31/2018	1000 / Monthly Retainer	Matters related to education and technology
Mary Tester	Activity Report	10/1/2018	11/30/2018	3000 / Monthly Salary	Matters related to education and technology

Figure 113. Review Report Page

My Registrants / Registrant Profile / Reports

Reports

LMP Corp. - Client
200 I Street SE 5th floor Washington, DC 20003
(222) 222-2222
mark.mcdermott@dc.gov

Edit Client Profile
Client's Key Contacts
Manage Client Profile
Delete Client's Profile

Registration Reports / **Activity Reports** / Previous System Reports

Activity Reports ?

+ Add New Activity Report

Show 10 entries Search: PDF CSV

Report Period	Status	Actions
7/2018 - 2019 Jan Activity Report	Not Submitted	Open Pdf Download Edit Delete

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 114. Registrant Profile - Reports Page – Report Not Submitted

My Registrants / Registrant Profile / Reports

Reports

LMP Corp. - Client

200 I Street SE 5th floor Washington, DC 20003

(222) 222-2222

mark.mcdermott@dc.gov

Edit Client Profile

Client's Key Contacts

Manage Client Profile

Delete Client's Profile

Registration Reports **Activity Reports** Previous System Reports

Activity Reports ?

+ Add New Activity Report

Show 10 entries Search: PDF CSV

Report Period	Status	Actions
7/2018 - 2019 Jan Activity Report	Submitted	<p>Open Pdf</p> <p>PDF CSV Print</p>

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 115. Registrant Profile – Reports Page – Activity Report Submitted